



LAWTECH **UK**

Building an Entrepreneurial Ecosystem to Improve Access to Justice

March 2023

LAWTECH **UK**
PANEL



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Foreword

The UK lawtech sector continues to grow at pace. Fast-growing lawtech companies are developing new and innovative ways to deliver legal services and law firms are investing and using technology at scale.

Whilst we've seen this developing sector go from strength to strength, the affordability and accessibility of legal support has remained largely unchanged, particularly for consumers and SMEs. It is time we changed this and supercharged a subset of the lawtech sector: JusticeTech.

JusticeTech is ideally placed to transform consumers' and SMEs' experience of the law and justice, for the better. By inspiring and supporting entrepreneurs to take on this challenge, we can fuel innovation, accelerate the creation of new digital products and services and attract much needed investment into this sector. All with the aim of, ultimately, improving legal outcomes for those who need it.

To achieve this, it will require the public, private and third sector to come together to create a vibrant, well connected JusticeTech community. It will require innovative new approaches to attracting investment and creating demand for JusticeTech. It will require more support for

entrepreneurs to test and build their solutions in safe environments with those with lived experiences.

The findings and opportunities identified in this report should be seen as the beginning of a journey to creating a flourishing JusticeTech ecosystem in the UK. We have included a range of stakeholders from across the community in both our research and opportunity building. To help make sense of the complex and fragmented ecosystem, we found it helpful to position our findings through the point of view of the entrepreneurs themselves. By placing ourselves in the shoes of an entrepreneur, we have been able to highlight opportunities to build successful JusticeTech solutions and support the growth of the JusticeTech sector at large, for the benefit of society and the economy.

Alexandra Lennox
Director of LawtechUK



JusticeTech is ideally placed to transform consumers' and SMEs' experience of the law and justice, for the better.

1. Key takeaways and opportunities

Key takeaways: Understanding the challenges

SUPPORTING ENTREPRENEURS WITH THE MEANS TO SUCCEED

The JusticeTech marketplace, while still in its infancy, has provided opportunities for entrepreneurs to successfully develop and launch their solutions in to the market in recent years. These entrepreneurs can be considered the pioneers in creating a fertile JusticeTech market. Through them, and other supporting stakeholders, we have been able to identify what has helped to drive their success and what barriers new entrepreneurs to the market will need to overcome.

Critical to the success of any JusticeTech entrepreneur is **securing investment** to scale their businesses. Upfront capital is required to fund the activities to develop products that demonstrate product-market-fit and reach the largest addressable market. This is especially important in attracting further investment, in an underdeveloped market like JusticeTech. To do this, entrepreneurs need to **balance the needs of justice-affected communities and investors** in order to find business models that allow them to seek funding from non-traditional sources.

We learned from entrepreneurs that **access to reliable data** and a **safe space to experiment** with it, as well as **collaboration and cooperation between industry stakeholders**, are critical to building scalable solutions with viable business models.

An additional hurdle faced by the JusticeTech entrepreneur is that **consumers often find the journey through the justice system complex and lengthy** and are not always aware that their problem is a legal one. This limits the ability of JusticeTech to deliver on its promise of transforming consumer access to the law.

We heard that both **the government and regulators have an important role to play in providing direction for entrepreneurs** on a clear path towards success, as well as helping to **instil trust in consumers and traditional firms** to adopt and use verified JusticeTech solutions.

Lastly we heard from citizen groups, industry experts and entrepreneurs themselves, that the overarching goal of any JusticeTech should be to improve access to justice, with economic success as a byproduct. To achieve this, **entrepreneurs with firsthand experience should be encouraged to enter the ecosystem.**

This report outlines current challenges and critical success factors that have driven businesses to transform the lives of justice-impacted individuals while providing a return on investment. It also highlights opportunities for change within the current supporting ecosystem.

The JusticeTech marketplace, while still in its infancy, has provided opportunities for entrepreneurs to successfully develop and launch their solutions in to the market in recent years.

Key takeaways: Opportunities for change

With a clear need and a market for JusticeTech solutions, there is an opportunity to capitalise on the growing passion and activism within the Access to Justice sphere, to create a vibrant, well connected JusticeTech community that attracts entrepreneurs, investment interest and support from the private sector. The most efficient, effective and sustainable approach to creating this ecosystem would be through the creation of a single convening point for the ecosystem, which has a dedicated entry point within government.

Within that ecosystem, the creation and scaling of JusticeTech could be accelerated through providing entrepreneurs with direct support in the form of access to experts and resources to support them to build, test and scale their solutions. Support of this kind would help them navigate the complex legal and regulatory landscape, develop successful business models that can scale, and test their products with those with lived experience. This type of support could be provided through specialised venture builders, sandboxes, and trial labs (such as the FCA Digital Sandbox), which have the support of regulators and government, and critically put justice affected communities at their heart.

Finally, this sector's full potential will only be realised if the current lack of available funding for JusticeTech is addressed. This will require attracting both demand for, and investment in, JusticeTech. We believe there is an opportunity to explore less traditional funding routes to encourage investment and there would be value in raising consumers' awareness of the options for legal support through better signposting.

These opportunities reflect what we believe would be good starting points for consideration.

1. Building a well connected JusticeTech community
2. Supporting entrepreneurs with building, testing and scaling JusticeTech through expert advice and resources
3. Attracting demand and investment

1. Building a well connected JusticeTech community



A SINGLE CONVENING POINT FOR THE ECOSYSTEM:

Stakeholders and entrepreneurs highlighted the vital need for building networks and connections to share knowledge and resources in addition to feeling part of valuable community. However, given the highly fragmented nature of the current JusticeTech ecosystem, many entrepreneurs struggle in knowing which organisation to approach and where to start in reaching out for support. Therefore we suggest that a **single convening point for the ecosystem is needed to bring together key stakeholders, act as a ‘front door’ for entrepreneurs and investors, take point on knowledge and guidance curation and take responsibility for educating the marketplace on opportunities within JusticeTech.**

As a first step, this single coordinating entity should **identify key persons and organisations across the community within the UK, to bring together expertise and existing efforts in supporting the JusticeTech market, including existing regional justice focussed communities where applicable.** A primary function of the single entity will be in working with all relevant stakeholders in the ecosystem to arrange events, working groups, awareness campaigns, education and further research.

Building a clear, strong interface between government agencies supporting justice and the JusticeTech sector is a critical element of this. The justice system itself is fragmented with multi-agency involvement, which creates confusion and makes it difficult for entrepreneurs to navigate. **A clear, single point of coordination** within government, that is able to provide clear signposting for JusticeTech entrepreneurs seeking to understand and navigate the system and interfaces, would alleviate this confusion.

2. Supporting entrepreneurs with building, testing and scaling JusticeTech through expert advice and resources



VENTURE BUILDERS AND TESTING ENVIRONMENTS WHICH PLACE 'JUSTICE-BY-DESIGN' AT HEART

We learnt that there are a number of unique factors that can make building and scaling a JusticeTech solution challenging. Whether that's finding the right business model that delivers to justice impacted individuals and investor simultaneously, or navigating the legal system and regulatory framework, it means that JusticeTech entrepreneurs would benefit from having specialist, tailored support to help them find the legal and technical knowledge and resources needed to succeed. There are two core enabling elements in achieving this:

- A level playing field must be created to ensure that entrepreneurs with lived experiences, less familiar with the legal and justice system, can find the knowledge and support they need to bring impactful solutions to the market.
- Creating a safe space for entrepreneurs to test solutions with the access to legal service regulators, government and users to ensure that consumers' justice needs are being met without compromising users or their own safety, as well as to fine tune business models and value propositions, ahead of seeking investment.

This could be achieved by convening the relevant stakeholder groups to assess ways in which the above needs can be delivered, which may include

expanding existing venture builders and sandbox environments already in place to include the space and opportunity to test JusticeTech solutions with real justice-impacted users.



REGULATOR SUPPORT TO HELP BRING NEW JUSTICETECH SOLUTIONS TO MARKET

The regulatory landscape is complex and JusticeTech entrepreneurs highlighted that they need support navigating this, to reduce both the burden and cost of becoming compliant where needed. Better support and guidance could be made available, not only where regulation applies, but in helping to identify what they can do to expedite the process of becoming regulated, in turn reducing the costs associated with becoming regulated for new market entrants.

The **Regulatory Response Unit (RRU)**, convened by LawtechUK, is a group made up of all the UK legal service regulators and the Financial Conduct Authority who have come together to provide assurance and guidance at pace to lawtech entrepreneurs via the Lawtech Sandbox. Continued collaboration amongst regulators and ability for JusticeTech entrepreneurs to engage with regulators will be critical.

KEY TAKEAWAYS: OPPORTUNITIES FOR CHANGE



COORDINATED APPROACH TO DATA COLLECTION AND DISTRIBUTION

All new JusticeTech solutions require data to build, validate, prove, and scale. Our research highlighted that currently very little data is available to entrepreneurs, which limits their ability to test, launch and scale their solutions and businesses.

We suggest that the relevant **data holders need to come together to agree and prioritise the mechanism for collection and sharing of data around cases, pathways and outcomes across both public and private sectors**, in order to:

- Provide evidence around size and scale of the consumer need (and therefore market opportunity)
- Assist government and courts services in understanding unique pain points, which could be alleviated with technology
- Understand what JusticeTech solutions exist to meet a given consumer need already (across Jurisdictions)
- Allow simulated data repositories to be created, which JusticeTech entrepreneurs can use to build and test their technology safely

There are initiatives underway that have started to tackle a number of these data needs, including the Legal Education Foundation's Justice Lab.

Additionally, the Online Procedure Rule Committee is a new rule committee that will have the ability to make rules for online services in the civil court, family courts and tribunals. Its remit also extends into the pre-action dispute resolution space, meaning that it will make rules for online courts and have the ability to set data and behavioural standards for online dispute resolution providers. The aim behind this is to provide a framework for allowing cases which are not successfully resolved at the pre-action stage to transfer seamlessly into the online court system.



RAISING AWARENESS OF THE JUSTICE CHALLENGES RIPE FOR INNOVATION

JusticeTech entrepreneurs are trying to build solutions that have to work within or around the current legal system, which is complex, outdated and under pressure. JusticeTech solutions therefore often operate (and replicate) those current systems, rather than making it simpler for consumers to achieve a desirable legal outcome quickly. On a large scale, this limits the impact of potential solutions as a driver for transformation within the sector.

As government looks at the end to end user journeys across civil and family justice and tribunals, it should engage with a cross-ecosystem group to identify the frequently used consumer journeys through the justice system and explore the opportunity for JusticeTech to re-invent these, for improved user outcomes. Additionally, publishing these consumer journeys may attract new innovative thinking and spark fresh ideas by entrepreneurs not yet working in the space.

3. Attracting demand and investment



IDENTIFYING SOURCES OF FUNDING FOR JUSTICETECH

JusticeTech companies often require a lot of upfront capital to invest in product-development and marketing to get their businesses off the ground and functioning to a point where they can demonstrate product market fit and attract traditional sources of start-up funding, such as venture capital. As the JusticeTech market is nascent and the business models JusticeTech companies deploy are less familiar/favoured by venture capital investors, securing funding to scale can also be difficult. These solutions could be highly attractive to less traditional sources of funding, such as impact investors, who are motivated by the positive social impact and accepting of a slower return on their investment. In the US, this is already a developing area, with specialised JusticeTech investor networks being established, such as done by Village Capital.

Encouraging investment into the JusticeTech market therefore requires a clear strategy that addresses:

- a) The **current barriers to JusticeTech entrepreneurs in accessing R&D and innovation grant funding** to help get their businesses off the ground, including clarifying what is available and how to apply.
- b) Ways in which **private sector sources of investment can be encouraged**, such as through connecting existing impact investors to JusticeTech companies and increasing the pool of impact investors by exploring opportunities with less traditional sources of funding, such as well-capitalised legal service providers.

- c) Whilst there is a knowledge gap on how to build, scale and finance JusticeTech (including what the investment curve looks like, what the margins should be and how to value them), **support with market sizing using centrally sourced data and educating investors** on the size and opportunity in the market would be valuable.



HELPING CITIZENS AND SMALL BUSINESSES KNOW THEY HAVE A LEGAL NEED AND NAVIGATING OPTIONS

Many consumers aren't aware the issue they are experiencing is a legal one and that the law may offer them protection or recourse. Government, legal services regulators and the third sector have an important role in helping people to identify they have a legal need, in navigating the system and knowing they have options, and that those options include JusticeTech. This could be improved by **information to increase awareness of legal problems and better signposting of JusticeTech solutions, within the support routes people access when facing a problem that has an element of legal need**. This would require raising awareness of these solutions with those organisations who currently act as the first port of call for consumers, to update their guidance and information on the consumer pathways and options.

2.

Background to the project

An introduction to the project

OUR PURPOSE

Building an entrepreneurial ecosystem to improve access to justice

Today, access to legal support is unattainable for many consumers and small businesses due to cost and opacity of the information and processes required to achieve a satisfactory legal outcome. The complexity of the law and our legal systems, as well as the mechanisms to support justice, means that many go without support or take years to reach a legal outcome, all of which costs the economy billions per year.

Despite the demand and need for cost-effective, easily accessible legal support never being greater, innovation in consumer facing legal services has remained largely static due to a lack of investment and limited resources.

We believe that by supporting entrepreneurship in consumer facing legal services through 'JusticeTech', we can encourage organic, technological innovation and attract investment into this market. In turn this will improve access to justice by creating new products and services that can deliver new legal services and products at scale and at a lower cost-point.

A few JusticeTech startups have begun to pave the way, but much more is needed to support a thriving entrepreneurial ecosystem that supports entrepreneurs to develop and scale new products and services that meet consumer need.

AIMS OF THIS RESEARCH

How might we build an entrepreneurial ecosystem to help close the access to justice gap?

Our research aims to understand how JusticeTech entrepreneurs are supported in bringing new solutions to market, what barriers they face and how we might address these challenges. As entrepreneurs success and the organic growth of an entrepreneurial ecosystem is contingent on the support of the audiences that entrepreneurs interface with, this research also looks to understand what support is currently available and also stands in the way of that community supporting entrepreneurs to gain the access and resources they need to start and grow a business.

As the research has provided an opportunity to talk to stakeholders from the supporting ecosystem as well as the entrepreneurs themselves, we aim to understand in more detail what attracts investment in JusticeTech and where more support is needed in building an attractive value proposition.

WHY ACCESS TO JUSTICE MATTERS

Global B2C Legal Services Market to Reach **\$176.9 Billion by 2027** growing at a CAGR of 3.8% over the period 2020-2027. [Source](#)

40% of consumers handle legal issues without assistance, and **only 22%** get professional legal help. **83%** of consumers have unmet legal needs. [Source](#)

Six in ten consumers experience a legal issue every four years, and **53% faced anxiety** as a result. [Source](#)

36% of people do not feel confident that they could achieve a fair and positive outcome when faced with a legal problem. [Source](#)

"92% of people that need solicitors can't afford them. Most A2J companies are paid by the users they are solving the problem for. That is **6 billion people in the world, the largest market** you could ever imagine and it's infinite."
- Investor Interviewee

Defining the landscape

During our research conversations, we noticed that different groups use different terms to describe legal technology that sells products or services to consumers (such as JusticeTech, B2C, A2J, and People Law).

We propose using the term JusticeTech and have created a system to help clarify the terminology used in the industry. By doing so, we hope to improve

communication between different groups involved in this field.

Our proposed system is meant to improve communication, but it's not meant to be a strict definition and should be used in context.

The term Lawtech has been used as an umbrella term to refer to all technology-based legal services.

WHAT DO WE MEAN BY AN ENTREPRENEURIAL ECOSYSTEM

The community of specialism and guidance which supports the development of those new technology solutions which bring about positive improvements to consumers in accessing justice.

Within a healthy ecosystem entrepreneurs can find knowledge and support covering consumers, the law, regulation, investment and business models as well as a community network to help identify resources.

WHAT DO WE MEAN BY ACCESS TO JUSTICE

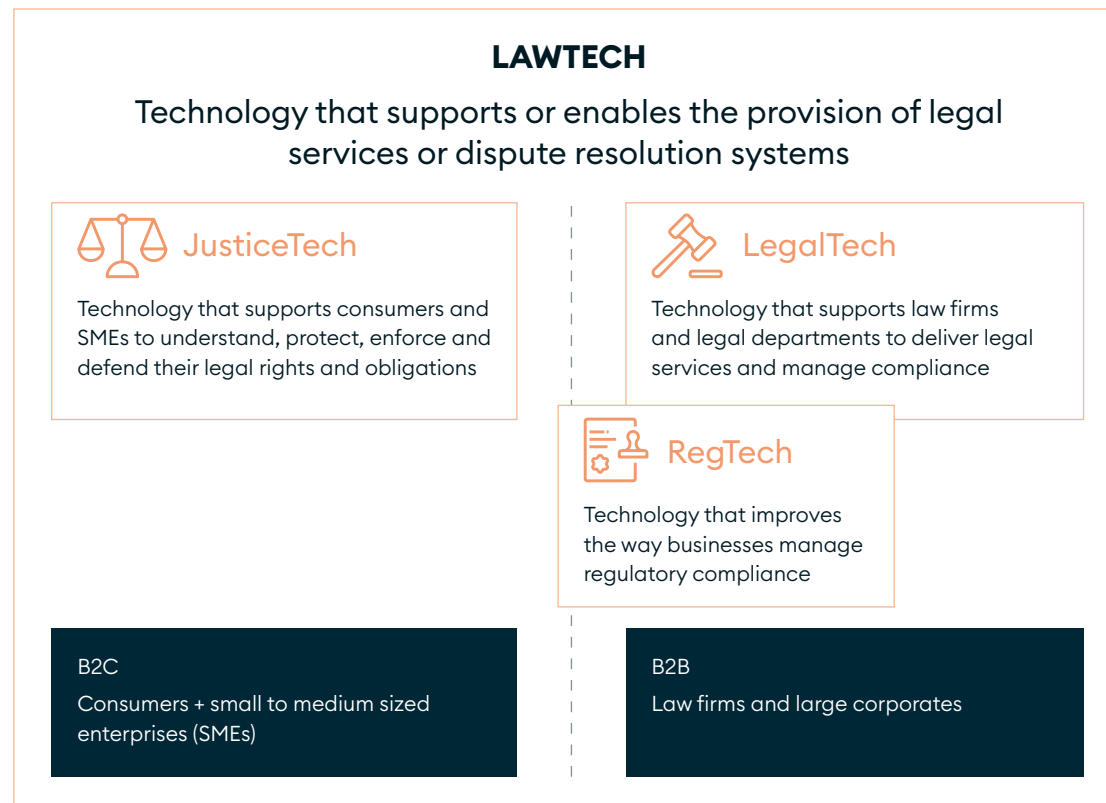
“It is not about access to lawyers, nor is it exclusively about access to court services. It is a fundamental human right. One that should ensure that everybody in society, irrespective of their background or financial situation, is treated fairly according to the law. If they are not, then they can seek appropriate redress.”

Christina Blacklaws, Chair of the LawtechUK Panel

Richard Susskind, member of the LawtechUK Panel and technology advisor to the Lord Chief Justice

proposes that there are four elements to access to justice:

1. Access to dispute resolution
2. Better methods of dispute containment (quick resolution)
3. Dispute avoidance
4. Legal health promotion (users understand the benefits of using the law)





3. Research findings

The rest of the report provides the detail of what we learned about JusticeTech entrepreneurs, the ecosystem that supports them and the barriers that they face.

Entrepreneur persona types

Our research has highlighted that it's important to recognise that not all JusticeTech entrepreneurs are the same. Their solutions are born out of a range of experiences, backgrounds and skills and cover a large area of consumer facing law and their motivations for entering the JusticeTech space may also vary. We have sought to group these into three different entrepreneur personas.

The support that Justice Tech entrepreneurs need varies based on persona. These personas were used to help generate the recommendations that can be found in the report. We believe that in order to put entrepreneurs at the centre of helping to close the justice gap, it is imperative that we continue to understand the perspectives and challenges of entrepreneurs as they enter the JusticeTech market. As such these personas should continue to be built upon as recommendations are taken forward.

This will provide all industry players with a rich and relatable way to build a deeper understanding of these varied strengths and needs, ensuring that the growing ecosystem is meeting the needs of JusticeTech entrepreneurs from all backgrounds and offering a level pathway to success.

Further information on the barriers to getting support, or gaps in current support ecosystem can be found later on in this report.



THE TECHNOLOGIST, HELPING ACCESS TO JUSTICE

Experienced technologist, from outside of the legal sector, who has seen an opportunity for JusticeTech to improve access to justice/legal outcomes and a real business opportunity.

Where they flourish

Deep technical expertise in the art of the possible
Thinking disruptively rather than being constrained by BAU
UX and marketing skills, agility to build quickly
Tech startup mindset with access to tech resources and connections

Where they need most support

Gaining knowledge of the law/legal sector
No easy access to a knowledgeable community for their legal niche
Identifying users + orgs to test/validate ideas
Understanding regulatory requirements



LEGAL PROFESSIONAL TURNED FOUNDER

Experienced legal professional (often from a small firm) who has identified how technology can be leveraged to deliver better value to the consumer, reduce their costs or improve their outcomes.

Where they flourish

Deep understanding of the law/legal process in a specific area of law
Well connected in the legal world, often part of a community, strong network
Sold understanding of regulation landscape

Where they need most support

Gaining technical knowledge/UX design
Seeing the potential of 'disruptive' tech solutions vs solutions support their BAU
Adopting 'Tech Start Up' mindset required to fund and scale their venture



THE EXPERIENCED CITIZEN

Person with lived experience of an aspect of the consumer facing legal sector who sees an opportunity to help simplify the process for other users, using technology.

Where they flourish

Deep understanding of the specific area of law they experienced
First-hand user experience of what good would look like
A passion for removing pain points for others
A fresh perspective, therefore potentially disruptive ideas

Where they need more support

Access to technical knowledge
Gaining knowledge of req's of law/legal sector & regulation
Finding a community to take their idea with mentorship, business case building and investment help
Knowing whether their solution already exists

Balancing competing needs of stakeholders

By viewing the findings through the entrepreneurs perspective, it is apparent that irrespective of how they have entered the world of JusticeTech entrepreneurship, in order to be successful they must strike a very fine balance between the sometimes competing needs of the stakeholders they need to engage with and get support from in order to scale their JusticeTech offering.

Our research highlighted 2 clear points of tension:

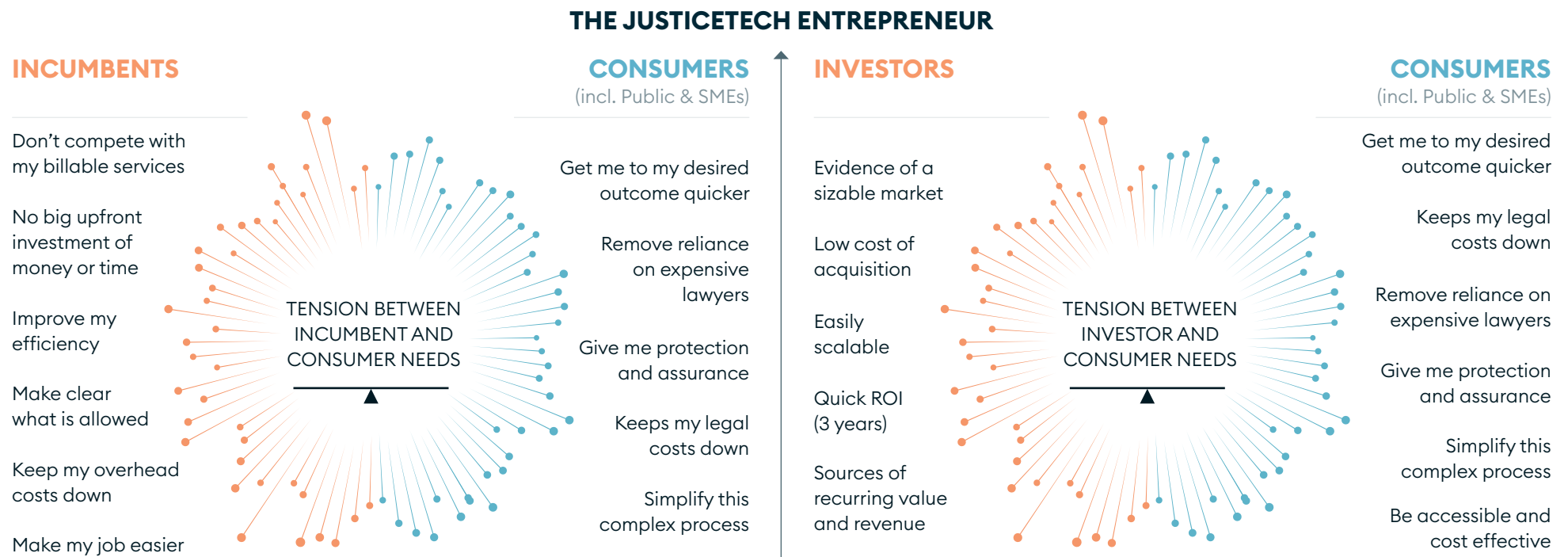
1. Between the intended buying audience of a JusticeTech solution (the small law firm versus the end consumer)

2. Between the cost needs of consumers in making justice accessible and the needs of non impact-investors for an attractive business proposition with clear ROI

These tensions are illustrated in the below diagram.

Given these stakeholders have competing and conflicting needs, of the 10 themes highlighted in the remainder of this report, we have chosen to focus our problem statements and solutions event around those areas which provide the greatest help to entrepreneurs in addressing these tensions.

As part of our process to understand the current JusticeTech market, we have catalogued those actors that are currently supporting entrepreneurs, which can be seen at a glance on the following page and in more detail in the appendix. What is evident is that although support does exist, there doesn't seem to be adequate connection or collaboration between these sources to create a supportive and easy to navigate JusticeTech ecosystem.



The wider ecosystem

Entrepreneurs must navigate a complex and fragmented ecosystem.

As part of our process to understand the current JusticeTech market, using our research (and interviewee knowledge), we have catalogued the actors that are currently supporting entrepreneurs, which can be seen in more detail in the appendix.

What is evident is that although support clearly does exist, it is very fragmented making it incredibly difficult for those outside of the legal profession to navigate through this to get the support they need, at the point when they need it.

The lack of a single gateway in to the ecosystem, means entrepreneurs can spend years trying to build and scale solutions, resources and business cases, without ever receiving the help they might need to set them up for success. There doesn't seem to be adequate connection or collaboration between these sources to create a supportive and easy to navigate JusticeTech ecosystem.

Encouragingly, where initiatives have brought together various actors in the ecosystem (such as the Nesta Challenge in 2020), JusticeTech entrepreneurs have reported how beneficial this has been to them and their business plans. This indicates that it is vital for this support to be a part of an ongoing programme of support, available throughout the 'prove', 'commercialise' and 'scale' cycles of the entrepreneurs journey, rather than a 'one off' time-bound opportunity.



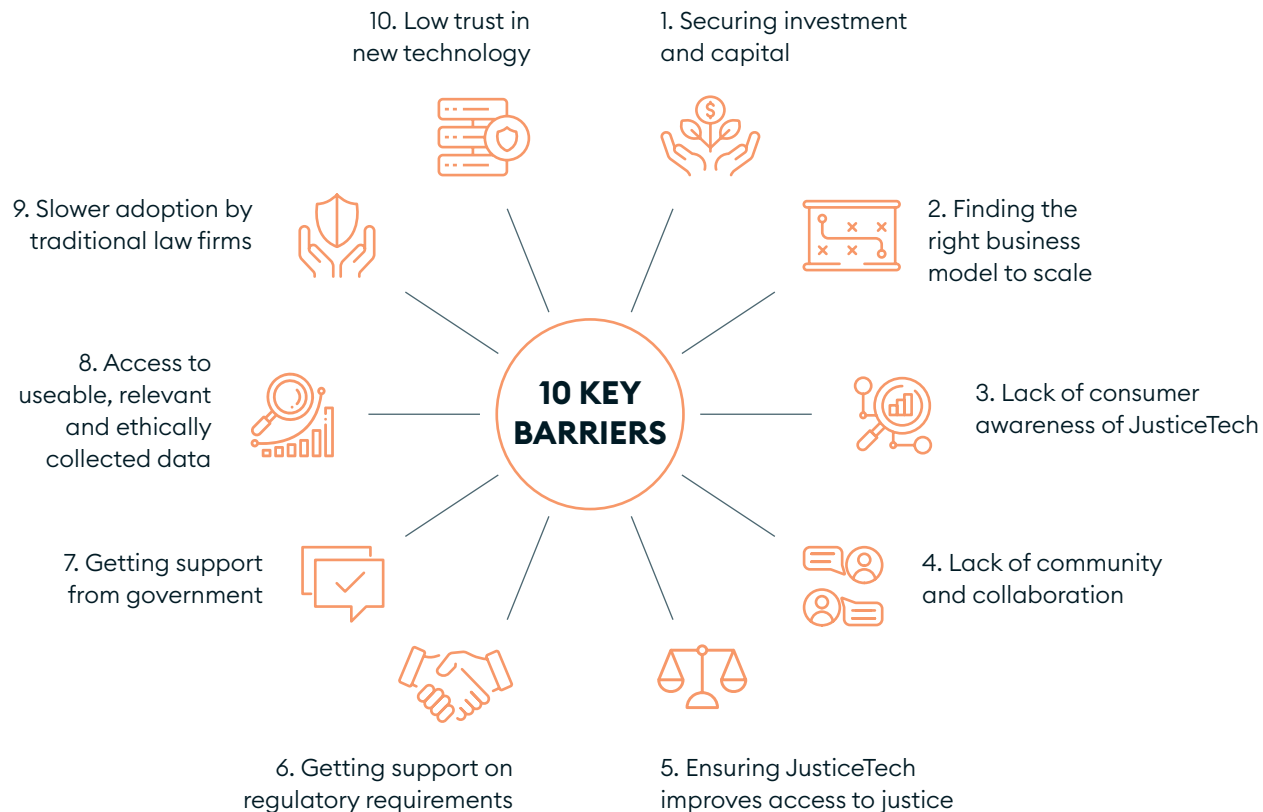
Key | Type of actors | Specific Organisations For a more detailed breakdown of these actors, refer to slides 63-67 in the appendix

Understanding entrepreneurs in the wider ecosystem

After interviewing multiple stakeholder groups within the JusticeTech landscape, it is apparent that **emerging entrepreneurs are faced with several challenges that they need to overcome if they are to survive and thrive in the current landscape**. Addressing these present an opportunity to build a fertile ecosystem that supports successful entrepreneurship and in turn delivers impactful solutions to an underserved market.

To help make sense of the complex and fragmented ecosystem currently supporting (or failing to support) entrepreneurs, we found it helpful to position our findings, including any barriers and opportunities we uncovered, through the point of view of the entrepreneurs themselves.

Our research identified 10 key barriers highlighted in the below diagram, and detailed in the full report where we have outlined what we heard from different stakeholder groups, what we learned as a result and what we might tackle first, to begin to build a healthy and buoyant entrepreneurial ecosystem around JusticeTech.



1. Securing investment and capital

Securing investment and finding capital to develop and scale JusticeTech solutions can be a key barrier for entrepreneurs trying to break into and succeed in the B2C JusticeTech market. Entrepreneurs need to find business models which are simultaneously attractive to investors and their target audience, who often have competing needs.

With the JusticeTech market being so underdeveloped and fragmented, making ROI data rarely available, many investors are not willing to take a chance on consumer facing JusticeTech solutions, which is why most of the current available funding or investor support is short-term. We also heard that there can be additional barriers for female-lead businesses, with far less funding being awarded to them across the start-up landscape.

Given that this sector is arising as a result of marginalised communities voices being heard, the entrepreneurial ecosystem has a duty to discourage 'justice wash' where JusticeTech solutions can enter the market under the banner of A2J without actually delivery A2J.

From what we heard, UK JusticeTech entrepreneurs do not appear to be well connected with impact investors who may have more aligned needs and values, than other investors who might be more averse to the legal space because of a perception that solutions are not built on scalable business models.



I need help changing the negative perception of investors around JusticeTech or finding those whose needs are better aligned with my own.

KEY OPPORTUNITIES TO EXPLORE

- Q How might we help JusticeTech entrepreneurs find investors that see the long term value in their solutions?
- Q How might we help JusticeTech entrepreneurs to demonstrate the opportunities within the B2C JusticeTech market to investors?

WHAT WE LEARNED

- There is a tension between providing access to justice for consumers at a price they can afford and building an attractive business proposition that will secure investment to scale a new JusticeTech product.
- Investors don't always understand the legal landscape, so they can't understand the requirements of the business model.
- There are impact investors doing good work to support businesses that are doing more than just making a profit, even it means it will take longer to see ROI. They seem to be less widely known / accessible to UK JusticeTech entrepreneurs than those with more traditional ROI timeline expectations.
- Entrepreneurs have experience in the 'problem' or opportunity they are solving for but not always in building scalable and attractive commercial models.

97% of JusticeTech funding in the last decade has gone to businesses serving corporate clients. [Source](#)

In 2019, **2.8%** of funding went to women-led startups; in 2020, that fell to **2.3%**. [Source](#)



THINGS WE HEARD

"You're looking for investors who aren't scared of B2C and JusticeTech. In FinTech, they have seen everything but with JusticeTech one of the biggest issues of all time is that they can't benchmark, because there's not enough data or "what good looks like" companies." - ENTREPRENEUR

"We got funding through a Knowledge Transfer Partnership Program for a machine learning and artificial intelligence project. We got £90k and had to match with £100k. The funds cover embedding a person with knowledge that you lack in your organisation. The two years went by so quickly. It allowed us to viably test and build out some prototypes but we didn't have an understanding of the product market fit, UX and CX in terms of communicating the value of a digital offering like that to the public. We've ended up employing that individual in our business and are bootstrapping further developments." - ENTREPRENEUR LAWYER

"Only 2% of available capital goes to B2C. And less than 1% goes to female founders. The fact that we're 2 female founders makes it harder to get investment." - ENTREPRENEUR

"Most JusticeTech companies seem to be solving a real problem. The challenge is that most of these problems do not have a venture scale opportunity, likely due to the vast majority of founders being lawyers." - INVESTOR

"We back mostly B2B companies. You can't really see an opportunity for any source of recurring revenue or recurring value and the cost of acquisition usually feels quite prohibitive. I have not yet seen a great success story in B2C inspiring people or any major innovations such as legal tech services for SMEs disrupting traditional law firms models." - INVESTOR

"92% of people that need attorneys can't afford them. It's like an infinite market. So it's about getting investors, impact and others, to understand that there is an insatiable market out there and it's a matter of reaching those impacted individuals and doing something which is still to their benefit." - IMPACT INVESTOR

2. Finding the right business model to scale

Balancing the needs of investors and end users can be a juggling act for emerging JusticeTech entrepreneurs in the A2J market. Securing investment seems to be the most crucial factor in helping startups to succeed, however, the challenges that poses (discussed in this report) require entrepreneurs to challenge conventional thinking if they want to survive and scale.

The Nesta 2020 Legal Access challenge highlighted a number of business models which may help entrepreneurs walk the line. In addition to this, we heard from entrepreneurs from both within and outside the legal space about the different journeys taken to navigate this challenging space, and the ‘trial and error’ approach taken before landing on a commercial model.

Whether charging firms to deliver value around a critical incumbent need in order to provide consumers with free access, or finding ways to help consumers pay only marginal costs by turning the traditional legal services model on its head, these entrepreneurs are forging the path for future innovation. Providing a means to share what they’ve learned to help new entrepreneurs to the market, could be crucial in helping new A2J JusticeTech solutions survive and thrive.

On the next page, we have a look at the businesses of the entrepreneurs we spoke to, how they secured investment and from where and the business models they created to do so.



I need to test various commercial models in a safe way as I develop my business and plan my marketing strategy.

KEY OPPORTUNITIES TO EXPLORE

Q How might we help entrepreneurs to get access to the tools and support they need to test their business models in a safe way before launching to the market?

WHAT WE LEARNED

- Business models for JusticeTech solutions require alternative thinking to find ways of generating ROI that attracts investors and makes it self-sustaining but without exploiting the consumer.
- JusticeTech has the potential to strip out cost to both end users and firms if the commercial model makes it affordable.
- Not all private investors are willing/able to give their time and knowledge to entrepreneurs to help grow a business.
- Public/institutional investment may provide assurance for other investors who aren’t familiar with the B2C legal space.
- Direct digital channels to the consumer market have proved fruitful for some JusticeTech entrepreneurs, cutting out the ‘Law firm’ middleman.
- Having the small firm as the target buyer of JusticeTech solutions, may actually prevent citizens from accessing technology that may benefit their legal requirements.



THINGS WE HEARD

“A lot of the acquisition channels that I specialize in are SEO, PR top of funnel activity. So that’s a big part of how we acquire users. E.g. Tik Tok is a big channel for us and we still use paid advertising and things like that as well. I think the big difference between us acquiring users online and a law firm doing the same, is that the firm would probably pay PPC or get some SEO people to do that work. But they would have to spend a lot and throw away a huge majority of the leads because those people couldn’t afford them. And so their cost per acquisition will be much higher, which is why a lot of firms don’t focus on consumers.” - ENTREPRENEUR

“JusticeTech SMEs are adapting their offer to a gap in the market. The product that we have serves the users that law firms would just have to turn away. We are a consumer legal platform.” - ENTREPRENEUR

“Due to the competition of all the other resources AND because we need to run a firm to make the money to bootstrap it, beyond the initial competition funding, we cannot scale it in a way that would make an impact in terms of access to justice, unless we can get some sort of commercial return.” - ENTREPRENEUR LAWYER

“It took a long time to find a model that VCs would back and at the same time, solve the actual problems that consumers have. We have to meet consumers price point, deliver value for the business and be amenable to the legal services market.” - ENTREPRENEUR LAWYER

BUSINESS MODELS WE UNCOVERED



Legal professional turned founder

Lawyers pay for qualified leads
+ free to the public

Entrepreneur Lawyer: Family lawyer with a desire to change an outdated approach to legal services.

Business model:

Online platform free to the public and charge a small fixed fee to lawyers getting qualified leads.

Investment:

Initial grant funding from Innovate UK and partnership with a university for phase 1. **Bootstrapping** until they can get further funding.

Currently trying to secure private funding which has been challenging.

Three potentials:

- One didn't work out because they didn't understand family law.
- Another said we were still too small - they only look at series 3 funding.
- One looking promising - a tech platform background.

Entrepreneur Lawyer - Dual business model: The B2B commercial model funds pro-bono side.

Fixed fees and connect with a human when you need

Entrepreneur Lawyer: Lawyer who foreseen an opportunity to provide services to individuals and SMEs to help them in diagnosing legal problems that they are facing and then getting the resources and information needed.

Business model:

B2B2C

Sign-up for free then pay for the chosen lawyer.

Investment:

First round started off with a combination of angel investment and EU Grant funding to help support that R&D and manage our partnerships.

Second round had some more debt funding from angel investors.

Entrepreneur Lawyer - Business model:

A platform that basically matches pro bono opportunities with lawyers who are willing to take on work; that is paid for by the law firms that subscribe to it on the behalf of their attorneys.



The technologist, helping access to justice

Freemium means you pay transparent fees for exactly what you need when you're ready to take action

Entrepreneur: Software engineer come digital marketer with a personal experience of discrimination at work and a desire to make justice more accessible.

Business model:

It's a freemium model. Online platform free to the public and they pay when they are ready to take action.

Investment:

First round was an institutional investor based on our reputation of building and scaling startups. Initially we were a B2B platform focused on data efficiency in law firms.

Second round: Closed angel round where we invited specific investors within our networks who we knew we could learn specific things from.

Third round was part institutional part angel where we looked for specific people who aren't scared of B2C.

Entrepreneur Lawyer - Business model: They used to be a law firm in the personal injury space. They pivoted to be a platform that is client centric and set does things like fixed fee instead of instead of percentage of winnings.



The Experienced citizen

Fixed fees communicated before you begin

Entrepreneur: Combined psychology and technology to "disrupt the legal market" based on personal divorce experience.

Business model: Fixed fees including VAT to consumers communicated at the beginning of the process with full transparency, to align everybody interest and allowing people to spread payment. Failed to get a fixed fee from traditional legal network lawyers due to how they bill, how they price and traditional mentality.

Investment:

Initial funding to develop MVP from friend who just sold a tech company. Had cash and believed in "tech for good."

First round of funding with friends & family to launch a legal service to the public.

Second round we used an agency that that finds angel investors. Had good product market fit and were gaining traction.

Third round via institutional funding, which was delayed by a court case that they ultimately won and which, in combination with the law changing in their favour, helped them secure institutional investment.

Now bootstrapping until profitable to regain control.

3. Lack of consumer awareness of JusticeTech

Building a business in the JusticeTech sector usually begins with a well-defined gap spotted in the market by entrepreneurs. Their initiative is often built on a strong recognition or experience of a clear consumer need, so when they arrive in the market they see the potential impact they can offer.

The difficulty arises, however, in making consumers aware of their JusticeTech offering, particularly when consumers are not always cognisant of when they have a legal need. Even when they do, they rarely know how to go about solving it. As a result, while entrepreneurs may launch a product to the market, being 'findable' to consumers is the route to commercial success.

Research has highlighted that, in reality, small law firms and third parties such as charities, insurance companies and citizen groups are often the gatekeeper and signpost to consumer access of JusticeTech solutions, as consumers still tend to seek out a professionals to help them navigate the justice system.

In addition, friends and family may influence a consumer's awareness or decision to use a legal tool, which emphasises the need for strong marketing strategies to increase adoption.



I need to build a strong brand to market my product directly to users and to industry players who can advocate my product.

KEY OPPORTUNITIES TO EXPLORE

- Q How might we encourage industry-wide advocacy of JusticeTech solutions as a way to help consumers achieve their desired outcomes sooner and more easily?
- Q How might we help JusticeTech entrepreneurs to build awareness around their solutions so that consumers can consider them as an option in their legal journey?

WHAT WE LEARNED

- Consumers often don't know they have a legal need and if they do they don't know how to solve it. Equally, JusticeTech providers don't always know how to reach consumers. Middle parties like consumer groups and charities often serve as a conduit between the two.
- Some of the citizens who most need the support and cost efficiencies that JusticeTech could bring are the least likely to ask for or stumble across the tools that could help them.
- The research indicates that citizens seem willing to use technology if it decreases their legal costs but usually want reassurance from a human that it's the right thing to do.
- Entrepreneurs need to put effort into marketing their solutions to third parties as advocates and directly to consumers in order to increase awareness and therefore adoption.

People with legal needs feel stressed, confused and disenfranchised from the justice system due to duplication and often conflicting solutions. [Source](#)



THINGS WE HEARD

"Some of our research has shown people will talk to friends and family or will Google, and their experience is then influenced by the search results [...] so if there is not clear validation from someone, they're probably not going to click on it." - THIRD SECTOR

"Whether that's health and social care services, whether it's a local community group or other kind of family support initiatives, those networks are gateways to advice services." - THIRD SECTOR

"People will go to the court buildings themselves, just to speak to someone, assuming they will find help, but there isn't any, so they're given a leaflet with organizations to contact and that's their starting point." - THIRD SECTOR

"People who don't have the funds to access legal advice, but also don't qualify for legal aid is a really big gap. Having tools that allow people to do as much as they can themselves and save their money for if they need to speak to professional would be widely accepted." - THIRD SECTOR

"If we say there is this option available online and you're more than capable of being able to use this based on our conversation, having the backing from us as an organization [...] is what helps people to use these things." - THIRD SECTOR

"We've decided that actually if you want to be a consumer led business, we have to spend a lot of time building the brand and prioritizing our content and getting as much free stuff out there as possible." - ENTREPRENEUR

4. Lack of community and collaboration

A key finding that emerged around collaboration and community is that there is a clear division between how entrepreneurs emerge into the JusticeTech market: those from a legal background and those from a non-legal background (such as technical specialists). Both groups bring different expertise that the other one requires, however, there is little collaboration between the two and overall a feeling of a lack of coordination and collaboration in the sector.

Those without legal expertise tend to struggle with navigating a complex legal environment and seemingly highly regulated framework, whilst those who lack technological expertise are challenged more by understanding how to develop a product that is fit for users or qualified staff with digital skills.

Despite rooted legal actors already having access to a strong network, overall the community is as fragmented as the JusticeTech solutions space itself. All actors agree that a central point of collaboration and resource availability would be highly beneficial to everyone.



I need to be able to learn from and collaborate with other entrepreneurs and stakeholders in the industry.

KEY OPPORTUNITIES TO EXPLORE

- Q How might we stimulate collaboration between legal professionals and entrepreneurs who have a lot to gain from one another?
- Q How might we encourage knowledge sharing within the JusticeTech community to learn from the successes and failures before us?

WHAT WE LEARNED

- For entrepreneurs entering the legal space, building a network from the ground up and finding basic information about their market is time consuming and costly, delaying their route to market and eating in to their funding.
- The small law firms seem to be well connected within their jurisdiction communities but that does not necessarily mean that collaboration and knowledge sharing is happening. For those entering from outside the legal sector, these networks can feel like a closed shop.
- There doesn't seem to be a curated and centralised ecosystem in the B2C JusticeTech space to source and share information and data.
- Sharing between non-legal entrepreneurs with knowledge about deep tech skills, UX and disruption, and legal entrepreneurs with knowledge about the legal market and regulatory landscape, does not seem to be happening at the moment but could be deeply beneficial to the JusticeTech market.
- If collaboration and knowledge sharing does not happen, it can increase the likelihood of failure with innovation and duplication of solutions to market, resulting in lower adoption of each solution.

THINGS WE HEARD

“My business could be three or four years ahead of where it is now. if only we were able to get other JusticeTech companies interest to merge with us, or for us to acquire them and bring in their assets.” - ENTREPRENEUR LAWYER

“I'm heavily integrated with the ecosystem. We have a very strong community but very poor collaboration. [...] The poor collaboration is due to competition and ego.” - ENTREPRENEUR LAWYER

“Collaboration exists as this is probably one of the best industries with a great sense of community, highly engaged, but you have to have an entry point to access it.” - CITIZEN GROUP/3rd SECTOR

“There's no collaboration between actors within the industry. There's no kind of success stories to follow as you would a similar type of space like fintech.” - ENTREPRENEUR

“Both of us weren't lawyers, so we really had to build our network from the ground up. It took us a year just building a massive legal industry UK market map, trying to understand who the major players were, how the money flowed and where most of the money went.” - ENTREPRENEUR

Lack of collaboration and information sharing across the legal sector on technology and its uses can lead to the repetition of mistakes when organisations try to innovate. [Source](#)

A variety of processes, products and services are duplicated: As an example, a number of organisations have developed legal aid eligibility calculators which have the same purpose and similar functionality. [Source](#)

5. Ensuring JusticeTech improves access to justice

We have observed a line of tension between making money and doing good. There is an awareness that in any tech goldrush towards new and commercially viable offerings, it may be tempting for entrepreneurs (and their investors) to lose sight of the positive justice-based impact of those solutions.

This requires entrepreneurs to tread a careful line between finding viable business models and maintaining the positive integrity of their offerings. Equally, impact investors with a justice-focused approach need to carefully vet the businesses they invest in to ensure they are creating a genuinely positive impact.

In addition, research shows that the best solutions are developed by those with lived experiences of a problem, who may not always have the skills or know-how to bring those ideas to life and into the market.

A successful ecosystem therefore needs to include these people and their experiences, and support them in turning their ideas into scalable solutions, or at the very least provide a feedback loop to include them in the design of solutions.



I need to design scalable solutions that attract investment but also effectively close the justice gap.

KEY OPPORTUNITIES TO EXPLORE

- Q How might we support individuals with lived experiences to bring their JusticeTech ideas to life in the market?
- Q How might we help entrepreneurs to ensure that the positive justice-focused impact of their business idea is not lost as they develop and scale their solutions?

WHAT WE LEARNED

- Some people strongly advocate to address a significantly under-served market by bringing justice through technological means.
- The impact investor community seems to be doing good work to support the emergence of JusticeTech solutions that genuinely serve access to justice individuals. Making these funders more prominent would help entrepreneurs ensure the justice-focused integrity of their solutions is not lost.
- Incorporating the ideas and/or voices of affected communities with lived experiences in the fight for access to justice is critical in creating solutions that solve real problems.
- Creating pathways through the ecosystem for JusticeTech entrepreneurs with lived experiences, seems key to ensuring solutions that address those access gaps, come to the fore.

THINGS WE HEARD

“I want to create the age of accountability. JusticeTech is an excellent test case for ‘profit with purpose’ and for improving society through a VC backed company, as well as creating real accountability for bad actors. I call it the 2000 pound problems. I think those are the really exciting parts of JusticeTech. If you can construct an exploitative model that solves those millions of legal services problems, then you will construct a profitable company.” - ENTREPRENEUR

“It’s unreasonably expensive for consumers to get legal services. Essentially the legal service market right now is only available to 20% of the market.” - ENTREPRENEUR [Source](#)

“If you look at other sectors, the most exciting disruptive opportunities are not launched by people with a background in that industry.” - INVESTOR

“If a really great idea comes from someone working in the Amazon warehouse, they can’t take six months off to start working on it funded by their blog posts. What they actually need is to be paid for a year with a salary, and the resources they need to build a prototype, make connections with people who can help refine their idea and pitch. Or we keep the current situation where 98% of funding goes to white males, with zero lived experience solving a problem from the outside...which will never have the impact.” - IMPACT INVESTOR

“You don’t want to build a business based on increasing the amount of harm. For instance, there was a company that one of our investors ended up not investing in because although their solution to provide convenient and affordable transport options for families to visit their incarcerated loved ones was impactful, the business model was based on more and more people being incarcerated.” - IMPACT INVESTOR

In 2018 there were still 5.3 million adults in the UK, or 10% of the adult UK population, who were non internet users. [Source](#)

A participant said that there is “no coordinated way of buying, updating or donating hardware or software solutions in the access to justice community. This prevents the sector from accessing productivity gains and innovation.” [Source](#)

6. Getting support on regulatory requirements

Our research highlighted that JusticeTech entrepreneurs are faced with an overall lack of clarity and guidance from regulators. This includes the following common concerns of JusticeTech entrepreneurs, who are struggling to navigate a fragmented B2C JusticeTech market:

- Lack of clarity on which regulator to belong to and how to go about being compliant.
- Financial and bureaucratic roadblocks of joining a regulator.
- Lack of control over the landscape with no clear guidelines on what applies to who.

These challenges have knock on effects for entrepreneurs, such as difficulty building trust with consumers who might look to the regulator for clarity and guidance on who to trust and what data to share, difficulty securing investment as the market feels too fragmented and risky, and in some cases, entrepreneurs avoiding the market altogether due to perceived regulatory challenges and risks, and a lack of safe space to test and develop ideas.

In addition, entrepreneurs from a legal background seem to be frustrated by startups from non legal sector, operating without regulatory compliance and legal qualifications, while external startups are not given clarity on what they need to do, in order to be compliant.



I need regulatory guidance to ensure that I am compliant and understand how best to navigate a complex industry.

KEY OPPORTUNITIES TO EXPLORE

- Q How might regulators support JusticeTech entrepreneurs without imposing stringent regulatory requirements on them, whilst simultaneously upholding the integrity of their mandate as the regulator?
- Q How might we make regulatory requirements and processes clear and easy to navigate for emerging JusticeTech entrepreneurs?

WHAT WE LEARNED

- There is a tension between JusticeTech providers from a legal background who are not getting the support they expect from the regulator who they pay, and those from a non-legal background who don't understand the regulatory requirements and don't see the benefit of being associated with a regulator due to lack of clarity provided.
- (Perceived) risk around regulation might be preventing some startups from entering the market. Some that do enter are unaware of regulatory requirements at first, thereafter having no choice but to manage the risks.
- There is a lack of consistency and sometimes contradiction in what new JusticeTech companies are told about their regulatory obligation.
- JusticeTech solutions that are born out of firms circumvent the regulatory barriers as they are compliant by default.
- Emerging JusticeTech entrepreneurs need a safe space to play as they develop and mature their businesses to a point where regulatory compliance is not a financial and operational burden.

44%
of firms cite regulatory uncertainty as barrier to tech adoption. [Source](#)

20%
of firms stated that the possibility of legal or regulatory risk in the future deters innovation. [Source](#)

THINGS WE HEARD

“I didn't know anything about regulation when we started so I didn't come with any of the fear. I literally just rang them up and told them absolutely everything we were doing. They said: 'we can't possibly regulate you, go away, be creative and do wonderful things; you don't need to worry about us'. Then a few years later we had to go to the High Court to prove that what we were doing was legal, which was obviously an incredibly stressful time and very nerve wracking.” - ENTREPRENEUR

“Regulators gave us this wishy washy kind of answer. They don't say yes or no, they basically say probably, but it's up to you to figure it out. So you take the legal risk, you decide, so it's up to us.” - ENTREPRENEUR

“I have spoken to other people who just didn't start the business because of the perceived risk of the regulation within this space. Like, I don't want to get involved with that. I'm gonna just gonna go do something else.” - ENTREPRENEUR

“Both options are non-optimal for us as a startup as we just cannot afford those kinds of overheads. Either splitting our company into two for the SRA, or going through the FCA approval process and then paying them a percentage of all of our profits. The regulation was definitely not designed for platforms like us.” - ENTREPRENEUR

“There is a regulatory gap in the fact that 'legal services' is not a protected term. There are online offerings in legal services like family and others and they're not lawyers. They're not regulated. They're not trained. They're not supervised. It's not against the law to to say on your website: "we are legally trained" even if they're not. The regulator isn't governing the market.” - ENTREPRENEUR LAWYER

7. Getting support from government

The government is expected to play a custodian role in the legal environment but has left a gap in bringing consistency and clarity to guiding both consumers and entrepreneurs in the right direction to achieve their desired outcome.

Government processes and the law itself can lag behind the industry, making the JusticeTech environment a challenging one to innovate in. In addition, the complexity and outdated mechanisms to support justice result in a huge range of legal cases being funneled through a beleaguered and outdated court system. For some consumers it can take years to reach a legal outcome, all of which costs the economy billions per year.

Cuts to legal aid have left many vulnerable communities with less access to justice, resulting in a massive demand and opportunity for A2J solutions but very little supply.

Part of the challenge for entrepreneurs in navigating government process is twofold: Firstly, because consumers see government agencies as a trusted source of information, any outdated or incorrect content provided by those agencies creates consumer confusion in knowing where to go next and how to access the legal resources (incl. JusticeTech) that could help them. Secondly, JusticeTech entrepreneurs are trying to build solutions that have to work within or around the outdated 'system'. This limits the impact of potential solutions as a driver for transformation within the sector.



I need government, as a trusted source of consumers, to support JusticeTech adoption through their custodian role.

KEY OPPORTUNITIES TO EXPLORE

- Q How might government leverage their custodian role to support emerging JusticeTech entrepreneurs?
- Q How might we encourage collaboration between government and the B2C JusticeTech sector to leverage opportunities that could relieve the economic burden on the justice system?

WHAT WE LEARNED

- If frequently used legal routes could be simplified, this would create fertile ground for technology to be better leveraged and deliver better legal/justice outcomes much sooner.
- Consumers often turn to government for reliable guidance and direction. When their information is outdated and misleading, it can create mistrust between consumers and industry providers, with providers powerless to change it.
- Changing anything within government requires time, money and resource that small businesses do not have.
- Government has reduced legal aid but has not increased their support for alternative solutions that provide access to justice.

THINGS WE HEARD

“Imagine the role of JusticeTech in increasing access to justice as a Grand Challenge. The problem is you’re trying to build that on an infrastructure and ecosystem that has decades of structural underinvestment.” - INDUSTRY ACADEMIC

“Because of the underlying complexity of the rules of our legal system, there’s an appetite to simplify and change the way the legal system approaches particular problems, rather than trying to replicate a dysfunctional system. If we’re really serious about JusticeTech, we need a serious commitment by government for a simplification programme.” - INDUSTRY ACADEMIC

“Outdated., Doesn’t provide the support that’s really needed to develop and grow a startup.” - ENTREPRENEUR LAWYER

“Gov.uk has the highest domain authority so from a public service perspective that information should be correct but, there are factual errors on there. Changing these takes time, energy and resource that we don’t have as a small business.” - ENTREPRENEUR

“Because the ‘justice system’ controls the process around the breakdown of relationships, it costs the country £51 billion a year. That’s more than the defense budget.” - ENTREPRENEUR

Legal disputes cost to SMEs in England/Wales: **£11.6 BILLION** includes legal representation, lost alternative business opportunities, and lost productivity. [Source](#)

SME late payment debt in UK/Wales: **£23.4 BILLION**. Costs SMEs **£4.4 BILLION** each year to collect money owed. [Source](#)

Research conducted in 2022 found the average civil court case (not criminal) took **350 DAYS** between a claim being initiated and the ‘first hearing’. The worst in UK was 426 elapsed day, which was just to the first hearing. It varies by region. [Source](#)

8. Access to useable, relevant and ethically collected data

Access to data was highlighted as a core need of emerging JusticeTech providers, mainly for the purposes of testing and validating their solutions, as well as to prove that there is a viable market for their product. Without the ability to do both of these things, access to investment and capital to launch and scale an idea is extremely challenging.

Currently, the fragmented nature of the B2C market, coupled with concerns around data security risks, makes sharing reliable data an uncommon practice. Entrepreneurs are looking to the government and regulators to provide a controlled source of shared data to be used freely by the industry.

In addition, we have learned that access to legal data (and knowledge) is asymmetrical. Large firms have access to their own data sets, case files and knowledge repositories, none of which they are obliged to share publicly, meaning that only they can innovate from it. This makes it difficult for new market entrants to gain traction and creates a closed loop where innovation and its gains stay within the private sector. Creating publicly available data could open up the market for entrepreneurs, improve access to justice (and legal outcomes) for consumers and see benefits flow back into the state provision.



I need access to reliable data to help me prove there is a market for my product and develop solutions that consumers feel assured of.

KEY OPPORTUNITIES TO EXPLORE

- Q How might we support JusticeTech entrepreneurs in accessing reliable data to help them develop, test and prove their solutions to the market and demonstrate integrity to lawyers and the public?
- Q How might we encourage better data sharing practices within the JusticeTech industry to help entrepreneurs successfully launch and scale their offerings?

WHAT WE LEARNED

- Entrepreneurs in the JusticeTech market have to do a lot more ‘punting’ to win over investors, as the industry is so new and the data from government that could help ‘size’ a market is not always collected and therefore not available, making it hard to prove product market value.
- A fundamental barrier to scaling and cross sector collaboration is a lack of regulatory clarity on ‘legal data’ and how entrepreneurs should protect, collect, process, share and retain data.
- Coordination on data collection and data sharing practices would make it easier for startups to break down silos and collectively raise sector success.
- Many data management systems that allow companies to efficiently store, manage and experiment with their data are expensive and therefore inaccessible to startups.

If UK SMEs bringing AI products to market cannot access data at scale or deliver services without meeting customer concerns around data access, control and privacy, they will operate at a disadvantage in most jurisdictions. [Source](#)

Talking about access to common data, a developer said: “The biggest blocker was that the market of people supporting [individuals with legal needs] didn’t want to share resources and did not want to defragment.” [Source](#)



THINGS WE HEARD

“One of the biggest issues of all time is that investors can’t benchmark because there’s not enough data. It’s not like FinTech where they’ve seen everything. So they don’t know what good looks like. And you know, investors use that a lot to evaluate the companies that go through the portfolio.” - ENTREPRENEUR

“What is difficult, is awareness and understanding of the need from data, not so much in terms of providing the data to resourcing it and fertilization of it. The main issue is around government and the regulators then either collecting or providing that data.” - ENTREPRENEUR LAWYER

“We did a lot of research with an external agency that basically showed that there is demand for our service. But it was still quite a punt at that point.” - ENTREPRENEUR

“If you are a big law firm or insurance company and you bring lots of cases before courts, you have access to data within your own systems - repositories of information that far outstrips that which is available in the public domain. It’s an inbuilt advantage because you’re not required to actually publish the underlying data sets that you built your products on. So no-one else can build innovation on top of that.” - INDUSTRY ACADEMIC

“It’s absolutely the responsibility of government to fix the regulation of access to legal data: fixing the data flows, creating API’s to access particular court service and fixing information asymmetries. There’s a cost reduction benefit for government and it opens up a sector and creates economic growth.” - INDUSTRY ACADEMIC

9. Slower adoption by traditional law firms

Due to the fragmented nature of the B2C legal market, it is largely served by smaller traditional firms. Unlike large businesses, consumers don't have big budgets to spend on legal services, which is why small law firms operate within tight budgets.

Even where new JusticeTech solutions would be beneficial for small firms and the end consumer (their client), they often cannot afford the upfront costs that are associated with investing in new technologies, and many struggle to move away from the traditional billable hour model. This can make it difficult for entrepreneurs to market their solutions to firms.

On top of this, small team sizes in these firms mean they have less skill and resource capacity available to dedicate to the innovation or implementation of new solutions.

Previous research shows that where efficiency, cost and client outcomes could all benefit from JusticeTech, small firms are willing (if not able) to use it. Some entrepreneurs, however, have found it easier to work around firms by marketing their JusticeTech services directly to consumers.



I need to create solutions that are easy to implement to encourage incumbents to use tech to augment engagements with clients.

KEY OPPORTUNITIES TO EXPLORE

- Q How might we help entrepreneurs to ensure that their solutions support small firm needs and are easy to implement, in order to increase adoption?
- Q How might we support entrepreneurs in building a business which reaches consumers directly, when there is low appetite for their services from small firms?

WHAT WE LEARNED

- Small firms serving the B2C market make their money by providing an expert service. For some, JusticeTech is seen as something that diminishes their service.
- Small firms with small teams don't often have the internal skills required to integrate and develop JusticeTech solutions without external investment and support.
- Small firms serving the B2C market often lack the capital to invest in JusticeTech solutions.
- Generic tools to improve efficiency seem to be more readily adopted by law firms than specific tools which might overlap with the services they provide and generate revenue from.
- Adoption of JusticeTech may be hindered by small firms where they are the gatekeepers to certain consumers who prefer to engage with human professionals first.

31% did not see JusticeTech as a strategic priority and **36%** were uncertain of the business benefits. [Source](#)

By 2024, legal departments will replace **20%** of generalist lawyers with non-lawyer staff who provide technical and operational support. [Source](#)

THINGS WE HEARD

“I thought I would scale my idea using firms and that I would simply be able to create a process that I could then give to lots of different lawyers, effectively white labeling it, and it would organically grow in that way. It became really clear really quickly, that lawyers just couldn't grasp this. I was trying to get them to fix do a fixed price a fixed fee, and they just couldn't do it.” - ENTREPRENEUR

“You can't try and change a law firm, you just have to work outside of the law firm, because the hourly billing model is king.” - ENTREPRENEUR

“Such huge diversity of issues in B2C and engagements are so sporadic that scalability is so challenging. This is why more solutions focus on internal process efficiencies for uniform issues.” - THIRD SECTOR

“Some simple JusticeTech solutions that target a very specific problem or services gap are time and resource intensive in terms of training or onboarding people, getting that kind of triage pathway up and running. It's much more complicated.” - THIRD SECTOR

“There's huge kind of professional institutional resistance. A lot of people are making a good living out of what they're doing, and it's really difficult to see that disrupted.” - INDUSTRY ACADEMIC

10. Low trust in new technology

Our research shows that most consumers are used to dealing with a human, rather than selecting technology as the primary mechanism for legal support in the first instance. This places the human in a ‘triage’ role, determining whether the technology can meet the consumers need and level of trust.

Interestingly, for those who may not know their need is a legal one (or have access to legal professionals), this can mean the use of online forums as a means to get help in resolving their legal issue.

Having had that triage, most people are willing to continue the process using JusticeTech to help them achieve their outcomes. Increasingly, tech savvy generations are at ease with using technology, and are therefore more likely to trust the process to get them to the desired outcome.

Small firms (who often act as the human triage), as well as consumers, see the benefits of technology as a way of keeping access to law affordable and augmenting the human approach BUT hold the view there’s only so much a non-human can do.

Entrepreneurs and their supporting ecosystem will need to convince consumers that technology can be trusted to enact legal processes where human intervention is not required.



I need consumers to understand that tech can augment the human experience and deliver value both economically and as a means of achieving desired outcomes.

KEY OPPORTUNITIES TO EXPLORE

Q How might we help JusticeTech entrepreneurs to build trust with consumers and firms by exemplifying the value that their technology can offer in augmenting the human experience and in helping to achieve a desired outcome?

WHAT WE LEARNED

- Some types of law favour the use of technology more than others. Where complexity or nuance is involved, it is felt that tech should be supported by human intervention.
- Citizens and small businesses seeking legal support are often in an emotionally difficult space. As such they sometimes want the human guidance to help them navigate the process.
- While the beneficiary of A2J JusticeTech is often the citizen or small business owner, they are often working with a small law firm or third sector group, who becomes the gatekeeper to technology solutions.
- Law firms are naturally risk averse, so data compliance is of high concern at all times. The use of technology exacerbates these concerns, which builds an additional barrier to the uptake of JusticeTech solutions.
- There is a general belief that digital tools which could help those most in need of access to justice would be well received if they were made aware of them, even in the way of forums to connect those going through similar experiences.

Ultimately, the public and legal professionals think that regulators, technology developers, and legal businesses all have a role to play in building public confidence and supporting uptake of technology in legal services. [Source](#)

THINGS WE HEARD

(Re online forums) People are looking for a space of digital trust: “One person described it to us as communities of trauma; a very poor advice seeking experience.” - CITIZEN GROUP/3rd SECTOR

“There’s a split of people who don’t trust technology generally and others who are capable but nervous that the information will not stand in court.” - CITIZEN GROUP/3rd SECTOR

“For all the breadth of different people that we see accessing legal services there’s still very much reliance on a face to face triage point with a client or a user, because it is that, which will give people the insight as to what competencies this person has, where they can be directed, what the level of trust is and what kind of additional resources it needs.” - CITIZEN GROUP/3rd SECTOR

“We have several different services that offer either an automated process where we’ve just created the tech to do the legwork or we have an integrated service where you still get the lovely tech, but you also get a human. [...] AI isn’t good enough to coach settlement.” - ENTREPRENEUR

“Our platform allows clients to find the right lawyers for their specific needs, feeding qualified leads to lawyers and reducing wasted time and effort. It also cuts out costly first meetings (±£800) where lawyers need to gather a lot of info to give the right recommendations.” - ENTREPRENEUR LAWYER



4. Appendix

The approach used to produce research and recommendations

We have used human-centered design as a method to better understand the current state of the JusticeTech market. This is a form of qualitative research which unpacking and understanding the experiences and opinions of various stakeholder groups to form a broad picture of how entrepreneurs can survive and thrive in this space and what must be in place within a wider ecosystem to help them and their solutions towards success.

This approach has included conducting interviews with people across the below-mentioned stakeholder groups, as well as reviewing existing research for additional insights into their experiences, and the challenges, barriers and opportunities facing entrepreneurs in this space.

To help make sense of the complex and fragmented ecosystem currently supporting (or failing to support) entrepreneurs, **we found it helpful to position our findings, including any barriers and opportunities we uncovered, through the point of view of the entrepreneurs themselves**, rather than the other varied stakeholders that we spoke to.

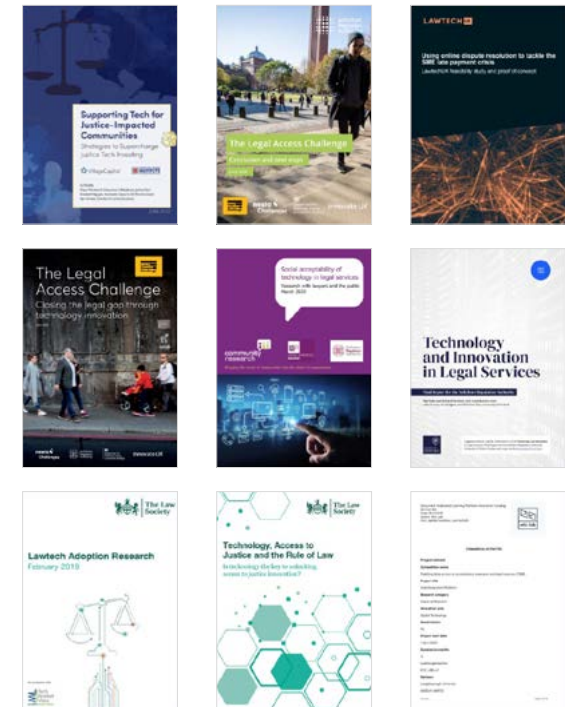
By placing ourselves in the shoes of an entrepreneur and considering what **they** may need to help them (and their Justice Tech solution) be successful, we have been able to highlight opportunities to support them and to make recommendations to take forward.

The recommendations we proposed have been co created with stakeholder representatives in a workshop consultation. These recommendations are designed to serve as a starting point for moving forward with tangible actions to help unblock obstacles for entrepreneurs and provide some short term momentum in stimulating a buoyant JusticeTech sector and supporting ecosystem.

STAKEHOLDER GROUPS INTERVIEWED

Academics 3rd sector
Industry experts JusticeTech Entrepreneurs
Law firms Investors
Citizen groups

RESEARCH SOURCES INCORPORATED





Appendix:

Proposed solutions suggestions
from our event

Event output preamble

On 28th February 2023, LawtechUK hosted a consultation on ‘Supporting Entrepreneurship in A2J’ in central London for 24 stakeholders and experts from across the A2J ecosystem.

Aside from serving as an inaugural bringing together of key actors in the JusticeTech ecosystem, the event was an opportunity to ensure participants were familiarised with the findings of the research laid out in this document.

In a facilitated workshop using human centered design methods, participants worked in teams to focus in on four of the barriers faced by JusticeTech entrepreneurs, listed below, as these seemed like fertile ground to provide quick wins and early benefit to entrepreneurs without depending solely on large scale systemic change.

- Securing Investment & Capital and finding the right business model
- Lack of collaboration and community
- Ensuring JusticeTech closes the justice gap
- Consumer awareness of JusticeTech

Participants first generated insights from our research findings before looking at the opportunities to better support entrepreneurs in these areas.

The specific solutions they co-created as an initial response to the opportunities can be found in the following section of this report. They are designed to serve as a starting point for inspiration, not only to help unblock obstacles for entrepreneurs, but also to provide some short term momentum in stimulating a buoyant JusticeTech sector and supporting ecosystem. They are not conclusive or agreed interventions but rather opportunities to further explore and discuss.

The associated recommendations have, where possible, been included in the broader recommendations made in the opening of this report.

We would like to thank all those who attended the event for their expertise and enthusiasm in addressing the barriers we identified, as well as for acting as early adopters/supporters of the JusticeTech ecosystem.



The event was an opportunity to ensure participants were familiarised with the findings of the research laid out in this document.

EVENT OUTPUT: SOLVING THE CHALLENGES AROUND

Securing investment and capital



THE FOCUS CHALLENGE

How might we help JusticeTech entrepreneurs and JusticeTech to educate investors to see the long term value in their solutions?

SOLUTION SYNOPSIS

Investors and entrepreneurs often find themselves on disparate paths due to misaligned needs and/or difficulty finding each other in a fragmented JusticeTech landscape. Consumers are left with gaping unmet needs.

An educational forum could help to teach investors about the size, value and opportunity within the JusticeTech market, and teach entrepreneurs how to find the right investors and how to pitch to them. In doing so, entrepreneurs and investors would be brought together, encouraging collaboration and strengthening networks within the JusticeTech ecosystem. Most importantly, it would help entrepreneurs find investors to launch and scale their solutions that could meet consumers needs and help close the access to justice gap.

INVESTMENT FORUM MARKETPLACE - EDUCATION, INVESTMENT, NETWORK



Entrepreneurs are often balancing the competing needs of investors and consumers, and as such, don't always connect or align in the way that the industry needs in order to address real A2J consumer needs.



The result is that investors learn the value and opportunities presented by the A2J market, and entrepreneurs learn how to pitch to investors and demonstrate the value of their solutions in a way that makes sense to funders.



The One Stop Investment Forum invites entrepreneurs and investors into a strategically curated setting where they can learn about the opportunities in the space and how to better connect and align with one another's needs.



A stronger investment network of impact funders is developed, helping more JusticeTech entrepreneurs to enter to ecosystem and launch solutions that can address the gaps in access to justice for consumers.

SPECIFIC RECOMMENDATIONS FROM OUR STAKEHOLDER EVENT:

Securing investment and capital

RECOMMENDATION

JusticeTech entrepreneurs need a way to connect with investors that understand the JusticeTech market and the opportunities it presents.

Since the research highlights that there may not be enough of these investors in the UK market currently, or difficulty for entrepreneurs in finding them, our recommendation is that a central source be identified to bring together investors and entrepreneurs that could benefit from connecting with one another.

This space should facilitate education for investors that will stimulate buy in to the JusticeTech market, education for entrepreneurs to understand how to approach and win investment, and help connect these stakeholders who may otherwise not find each other in the currently fragmented landscape.

CALL TO ACTIONS

- LawtechUK could use their data on existing actors and stakeholders to bring the right people into these forums
- Approaching government for more money to fund the forum
- Funding needs to be neutral, so not from corporate but from regulatory or MoJ
- Someone with authority needs to come in and lead this, and try join up some of the siloed gaps that exist within the space currently
- Not wasting entrepreneurs time by making them do labour and time intensive programs that don't actually deliver on the outcomes they need

EVENT OUTPUT: SOLVING THE CHALLENGES AROUND

Lack of collaboration and community



THE FOCUS CHALLENGE

How might we help entrepreneurs navigate through the ecosystem of community support that is available to them?

SOLUTION SYNOPSIS

There are many entrepreneurs who have spotted a gap in the JusticeTech space but they don't know where to start or who to speak to in terms of bringing their solutions to market. They might try various different avenues, such as researching regulatory bodies and their requirements, seeking out peer groups and other startups through online research or connecting with accelerators and other support networks.

'The Fixer' or an academy of 'fixers' would be centrally hosted by an organisation to manage and curate networks and connections to other people in the industry, as well as do knowledge management to ensure consistency. The process might begin with a human but could be triaged through to technology interfaces to manage high volumes of requests. Entrepreneurs would have a direct line to a 'fixer' who would connect them with other startups, broker investment if needed, connect them to groups such as the Justice Innovation Network and handle all regulatory processes. This would provide a standardised experience to ensure that all entrepreneurs get the same benefits, regardless of where they are starting from and who they are already connected to.

THE FIXER - CENTRALIZING SUPPORT FOR A2J ENTREPRENEURS



Knowing where to begin to get a solution into the market can be very challenging for entrepreneurs, particularly those coming from outside of the legal industry who may have no experience navigating this complex environment.



The Fixer would provide centralised support for all entrepreneurs by serving as a conduit between them and other stakeholders, and in doing so, providing support and ensuring consistency across the industry.



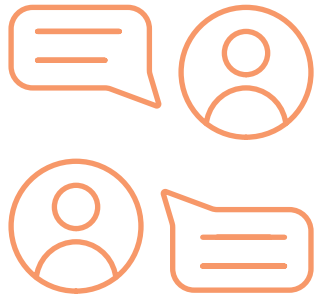
This support would include things like connecting entrepreneurs to one another to build their own support networks, brokering investment deals, linking them to support groups, and managing all regulatory processes.



The result is that entrepreneurs are supported in finding a clear pathway to success and a stronger community within the JusticeTech space can be formed, making it easier and more attractive for future entrepreneurs to join the market.

EVENT OUTPUT: SOLVING THE CHALLENGES AROUND

Lack of collaboration and community



THE FOCUS CHALLENGE

How might we stimulate collaboration between legal professionals, entrepreneurs and consumers who have a lot to gain from one another?

SOLUTION SYNOPSIS

Because of the current fragmented nature of the JusticeTech market and often poor visibility of existing solutions as a result, it is difficult for consumers and advocates or natural gatekeepers of JusticeTech solutions, such as citizen groups and small firms, to know what's out there.

Global Works is search engine that takes a description of your issue can generate examples of products or solutions that have worked well in other, similar scenarios around the world. In this way, it serves as a directory for JusticeTech advocates to help triage consumers and point them in the right direction towards solutions that can help them reach their desired outcome more efficiently and affordably. In addition to this, it helps entrepreneurs to connect with advocates of JusticeTech around the world and helps them avoid reinventing the wheel and making the same mistakes that have already been made by others walking a similar path before them. The collection of this data can serve as a powerful tool to help increase investment interest and confidence in the JusticeTech space and help connect stakeholder across the industry as they share knowledge and learning that will benefit the global industry as a whole.

GLOBAL WORKS - CENTRALISING SUPPORT FOR A2J ENTREPRENEURS



Because of the current fragmented nature of the JusticeTech market, many stakeholders within the space operate in contextual siloes, making it difficult to know what else is out there and to connect with others.



Global Works is a sophisticated search platform that allows entrepreneurs and advocates/gatekeepers of JusticeTech around the world to find one another so that a more connected ecosystem can be stimulated.



Entrepreneurs are able to get their solutions in front of a much bigger audience and JusticeTech advocates can do a better job at guiding consumers to the best possible tools that can help them achieve their desired outcome.



Entrepreneurs are also able to connect with and learn from others. The data collected through this platform serves to encourage investment and therefore helps grow the industry and most importantly, close the gaps in A2J.

SPECIFIC RECOMMENDATIONS FROM OUR STAKEHOLDER EVENT:

Lack of collaboration and community

RECOMMENDATION

JusticeTech entrepreneurs struggle to connect with, share and learn from others in the industry because of the fragmented and siloed nature of its current state.

The recommendation is to centralise a curated directory and source of information for all JusticeTech entrepreneurs to encourage collaboration and help make the connections they need to launch and scale successful businesses.

A source of funding opportunity for this could be to charge investors to access this directory as a way of finding and being matched with the right businesses to invest in.

CALL TO ACTIONS

- Identify an owner and approach them
- We could ask LawtechUK to run this but the RIU would help set this up and test demand as well
- Investors could pay for access to this, to actually meet some of the entrepreneurs using this service
- To de-risk this idea, demand would need to be tested with an MVP and real users

RECOMMENDATION

The JusticeTech market is currently very fragmented, making it difficult for consumers to find or become aware of the solutions that are available to them, for entrepreneurs to get their solutions in front of consumers and for advocates of JusticeTech to know where to point consumers.

The recommendation is to create a centralised 'catalogue' of solutions that shows consumers, entrepreneurs and JusticeTech advocates what's already out there so that learnings can be shared, duplication can be avoided and ultimately a more integrated and collaborative JusticeTech ecosystem can be formed.

CALL TO ACTIONS

- Need high level buy in from multi jurisdictions to help create the database
- Would need to identify who is going to fund this
- Would need to encourage data sharing to help inform best practice that would benefit all parties around the world

EVENT OUTPUT: SOLVING THE CHALLENGES AROUND

Ensuring access to justice JusticeTech closes the justice gap



THE FOCUS CHALLENGE

How might we support individuals with lived experiences to inform the development of JusticeTech ideas?

SOLUTION SYNOPSIS

A 'proving ground' could help attract emerging JusticeTech entrepreneurs who need support in developing and testing an idea, as well as build confidence in the sector, particularly the investment community. Entrepreneurs who have identified a problem and developed a solution but need to find investment to scale, get user feedback and actually deploy their solution into the market could run through a 'clinical trial' for JusticeTech solutions.

It would begin with a range of regulators who evaluate new ideas and provide the first level of approval to give the industry the confidence that they don't present any regulatory or compliance risks and are safe to be tested with real consumers in a controlled framework. Then, other stakeholder groups who serve as natural entry points into both legal and non-legal processes, would identify the consumers who are best suited to test the solutions, fully informed of the risks and safeguarded by other facilities within the process. This would provide a steady flow of solutions being tested under real-world conditions, so that a group of refined technical solutions that meet real user needs can emerge out of this and more successfully secure investment to scale.

LEGAL SERVICES 'CLINICAL TRIAL'



It can be challenging for emerging entrepreneurs trying to break into the JusticeTech market to know where to begin and to gain access to the right resources to test and develop their ideas.



After being assessed by regulatory bodies to ensure compliance, groups who serve as natural entry points for consumers into the legal industry match solutions with a suitable testing audience.



The Legal Services 'Clinical Trial' guides entrepreneurs through an evaluation, testing and iteration process that helps them to develop their solutions in a safe and supported way.



The solutions are then iterated and refined, based on feedback, to help entrepreneurs find the right product market fit and secure investment for solutions that have the ability to scale.

SPECIFIC RECOMMENDATIONS FROM OUR STAKEHOLDER EVENT:

Ensuring A2J JusticeTech closes the justice gap

RECOMMENDATION

Because it can be so challenging for JusticeTech entrepreneurs to get their solutions into the market, particularly for those outside of the legal space who might have identified a need through lived experience, the recommendation is to create a structured approval and iteration process to help these entrepreneurs test and develop their solutions in a safe environment.

This will give equal chance to all emerging entrepreneurs, regardless of their background, as they go through the same process and get the same support along the way to help them launch a successful solution.

CALL TO ACTIONS

- Identifying and forming a solid working party of regulators and other stakeholders to provide the two layers of funneling during the 'clinical trial'
- Building a framework around this to understand the remit of each section and each organisation within the particular group

EVENT OUTPUT: SOLVING THE CHALLENGES AROUND

Lack of consumer awareness of legal tools



THE FOCUS CHALLENGE

How might we encourage the promotion of JusticeTech solutions as a way to help consumers achieve their desired outcomes?

SOLUTION SYNOPSIS

Only a small proportion of people actually know when they have a legal problem, so entrepreneurs can market to that pool but it's not a big enough audience to scale their solution. For this reason, the most important first step is to provide public legal education so that consumers can be informed before a problem actually occurs.

This platform allows consumers to educate themselves about a process that they are going through so that if something goes wrong, they know how to react, what course of action to take, and what sources are available to them to assist. This opens the opportunity for JusticeTech solutions to be marketed to an informed audience.

PUBLIC LEGAL EDUCATION - EDUCATION BEFORE NEED



Consumers often don't even know when they have a legal problem, so before they can be receptive to JusticeTech tools, they need to know how to recognise a the type of issue they have.



This means that when issues do occur, consumers know what to expect, how to react and what options are available, including JusticeTech solutions, to help them achieve their desired outcome.



The Public Legal Education platform helps consumers get educated about processes they are going through to help avoid issues but more importantly, to know what to do if they occur.



The result is that consumers can avoid the panic of not knowing what to do and then initiating the expensive expertise of professional legal services because they think it is their only option.

SPECIFIC RECOMMENDATIONS FROM OUR STAKEHOLDER EVENT:

Lack of consumer awareness of legal tools

RECOMMENDATION

Because consumers need to know that they have a legal need before they can realise that JusticeTech might be able to help them, education around what constitutes a legal need and then how those can be addressed is crucial to developing a buoyant JusticeTech market.

The recommendation is to create a consumer facing platform that holds a repository of information around different legal needs and processes and how they can be address through which channels and tools. This will help avoid the panic mode that we often see consumers enter the legal market in, which places additional burden on the court system. In addition, it will create an engaged market and open opportunities for a range of JusticeTech services.

CALL TO ACTIONS

- Secure funding - this could be from government or fueled by the tech solutions that are marketed on the platform later in the process
- Representatives from across the working sector need to be part of the group to develop this solution
- The solution itself needs to be extensively marketed to both consumers and advocates of JusticeTech

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Thank you

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