



# LEPOLE

## EVOLUTION OF EDTECH BUSINESS MODELS

Prospective monitoring  
December 2022  
by Geneva Intelligence



# Summary of the december 2022 edition



## Definition of Edtechs



## Methodology



## Trends Analysis



**GoGuardian** is a tool for monitoring and protecting various online activities to make the internet safer for learners.



**Panorama Education** is a platform that aggregates student data, measures social-emotional learning, conducts surveys and provides behavioral analysis.



**Ready Education** is a turnkey solution that takes the form of a mobile application to facilitate life on campus and enable better communication between students and the school.



**Smartest** is an application for designing interactive learning modules from documents, such as PDFs or images.



**Gimkit** is a tool that relies on gamification to increase learner engagement. To achieve this, the solution borrows its format from game shows.



## Definition of Edtech :

The acronym EdTech is short for Educational Technology. **EdTech represents the use of new technologies to facilitate and improve knowledge learning and transmission.**

For example, e-learning provides individual digital teaching instead as an alternative to physically attending classrooms. These "classrooms" and MOOCs (Massive Open Online Courses) are lectures broadcast on the Internet. The LMS (Learning Management System) makes it possible to distribute educational content online, including course. There are also educational robots that capture the attention of young people and support them in their learning.

EdTech provides tailor-made and on-demand services. It revolutionises teaching, making it possible to **design a personalised learning path for students.**

Teachers and schools in general also benefit from these technologies, which facilitate the sharing of knowledge in collaboration with their students through participatory and pedagogical teaching. In addition, they use these technologies as **online platforms to better organize, control and monitor learning and adapt their teachings to students.** This allows them to provide more relevant and effective services.

Overall, Edtech benefits students and teachers as well as schools by **facilitating administration and communication.** They improve dialogue, education, learning and above all pedagogy.

**DISCOVER MONITORING METHODOLOGY**



# Prospective monitoring - Definition



## Overview

Prospective monitoring consists of collecting strategic information in order to anticipate changes in the ecosystem and respond as quickly and appropriately as possible. Prospective monitoring provides support for the implementation of a commercial and technological strategy.

## Methodology

An effective method involves regular monitoring and service developments monitoring.

The below steps were taken to carry out the monitoring and illustrate the results:

- Research, analysis and comparison of a dozen innovative offers in the field of Edtech.
- Identification and understanding of the commercial and technological benefits of these results.
- Identification of Edtech trends and innovations. Trends represent market characteristics and developments.

## Objectives

For a company or educational institution to compete sustainably competitive it needs to be constantly aware of changes in its market, in order to either limit potential risks or benefit from these changes. This would involve the following:

- Monitor competitive products and service developments.
- Identify and distinguish innovative trends and strategies over the long term.
- Analyse and compare this information with the organisation's current strategy.
- Evaluate competition and their business strategies through their innovations.
- Carry out a self-evaluation and develop a strategy.
- Find inspiration in business and technological trends.

**DISCOVER EDTECH TRENDS ANALYSIS**



# Edtech trend analysis



## Main technological trends

Represent **opportunities or threats** for the various players in the sector



Gamification



Artificial intelligence



Big Data



VR



Publication of the "Education Technology Market by Infrastructure, Systems, Devices, and Solutions 2022 - 2027" report

The report evaluates a wide variety of digital learning environments with an analysis of technologies and solutions, including hardware, software, devices and services. According to the report, more than 70% of all formal education programs will rely on Edtech solutions by 2027. In addition, the global virtual classroom infrastructure market will reach USD 58.9 billion by 2027.

## Major developments



The Indian EdTech that operates on a freemium basis has raised **USD 250 million**. The new funding valued the Bengaluru-based startup at USD 22 billion

The English start-up

\* **blackbullion**

specialized in budgeting raises **GBP 2.5 million** in an oversubscribed funding round shared exclusively with UKTN.

The learning platform



raises **USD 35 million** to enhance its technology and product profile.



has just raised about **EUR 5.7 million** to make learning more immersive through VR.

## **GoGuardian : A tool for monitoring and managing online classes**

GoGuardian is an online activity protection and monitoring tool to make the internet safer for learners.

### **Type**

Tool for protecting and monitoring online activities.

### **Competitive advantage**

GoGuardian makes it possible to filter the content available on the internet, but also to communicate directly with students.

### **Price**

Pricing depends depending on the size of the institution and the number of users. According to Reddit posts the price is between USD 7 (CHF 6.92) and 13.5 (CHF 13.35) per user.

### **Nombre d'utilisateurs**

According to the website, GoGuardian claims to have over 22 million students using the solution, over 10'000 schools and 500'000 educators, mostly in the United States.

### **Level of development**

GoGuardian is a startup founded in 2014 in Los Angeles, California. In January 2015, the Los Angeles Unified School District (LAUSD) selected GoGuardian to support its device deployment program to 661,000 students. In May 2018, the startup was acquired by private equity firm Sumeru Equity Partners. It is now a recognized company in the education sector.

**Link** <https://www.goguardian.com/>

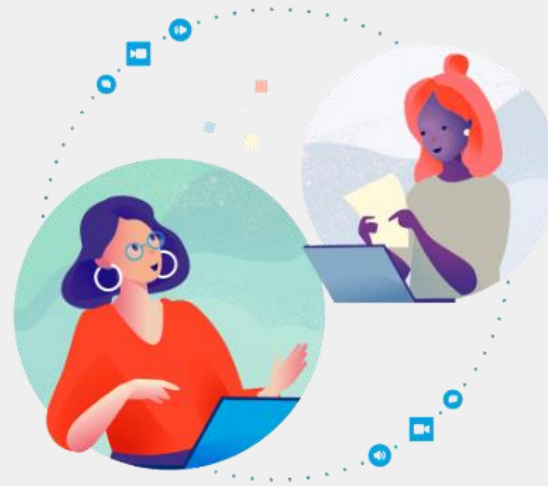


### **How does it work ?**

The solution is installed on all the students' computers, which allows teachers to filter the different online activities. The teacher can also view the learner's computer screen in real time, suggest links, talk directly with an online chat... The tool also allows to set up videoconferences in a simplified way.

## Features:

- The solution offers more or less precise **filters in order to limit distractions as much as possible, but also to ban unwanted content**. Teachers can set these filters to block or make accessible certain sites.
- GoGuardian implements an **instant screen-sharing system**, which allows teachers to supervise various student activities. This way, they can advise them on their learning by giving advice or sending more specific links. The teacher has the ability to close the students' window when necessary.
- **Instant messaging** is constantly open to increase communication and interaction between the learners and the teacher. But also to facilitate remote work.
- The tool integrates a **"security" feature** that alerts the designated staff in case the online activities present a risk of danger to others or the individual (depression, suicide...).
- The **ergonomics of the product** is well thought out with a real-time view of all students and the possibility to manage digital resources for the class or for each individual.
- The solution offers a **detailed report of student browsing activity** to teachers from the class sessions.
- A **video conferencing system** includes interesting options such as recording of presentations.



Kindergarten	★★★	High School	★★★★
Elementary School	★★★	University and school	★★★★

The Covid-19 pandemic has forced teachers, institutions, but also students to adapt to online courses. This phenomenon has reinforced the implementation of computers in education. For this reason, GoGuardian offers the following advantages :

- **The implementation of filters allows limiting access to different websites and applications.** This way, learners are **less distracted**, and **protection** against malicious content is increased. This feature is a **time-saver for teachers**, but also a way for schools to reassure parents.
- The availability of a permanent **instant messaging** system **improves interactions between teachers and learners**. This tool coupled with the ability to directly observe the user's window can **improve teacher responsiveness** and better understand student questions.
- GoGuardian is a tool that can be used for both **video conferencing and face-to-face classes**. **This allows for greater flexibility** for the institution, teachers and learners.
- **The detailed reporting of internet research activity as well as the "safety" feature can detect distressing situations** among students. The institution to put in place certain measures as soon as this type of behavior is detected (parent-teacher meeting, internal psychologist...).
- The implementation of an **interface with all the screens of the class** allows to get an **overall view**. Thus, the teacher can control the progress of the different tasks.

However, this tool has two negative points:

- The **feeling of always being controlled** and monitored by a teacher can become oppressive for students. In this type of situation, they might put in place different stratagems in order to avoid being monitored. This would be counterproductive for learning and teachers.
- It is important that all students have a digital tool and more specifically a computer. To avoid **increasing inequalities**, the school should lend the equipment. If the school does not have computer equipment, the acquisition of computers represents a significant cost.





Panorama Education is a comprehensive platform that aggregates student data, measures social-emotional learning, conducts surveys and provides behavioral analysis.

### Type

All-in-one platform that gathers qualitative and quantitative information about an institution.

### Competitive advantage

The solution saves time by consolidating student data and offers the implementation of surveys and socio-emotional learning.

### Price

The price is variable and no precise information has been found on this subject. In an interview with [EducationWeek](#), the CEO of Panorama Education indicated a price range of USD 500 (CHF 495) to 3000 (CHF 2969).

### Number of users

According to the site, Panorama Education serves more than 15 million students in 25,000 schools, 2,000 districts and 50 states, primarily in the United States.

### Level of development

As we can see on LinkedIn, the startup is founded in 2012, it has between 200 and 500 employees in 2022. It is now a mature start-up that has raised USD 60 million in 2021.

### How does it work ?

The platform centralizes the data of all the students in order to understand the evolution and better identify any weaknesses. The solution also allows to better understand the socio-emotional learning of the students with questionnaires. In addition, surveys are offered for students, family members, teachers and staff.

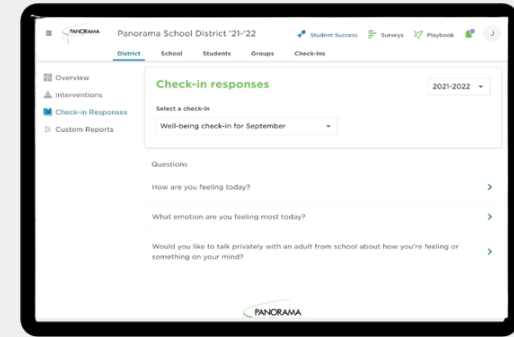
**Link** <https://www.panoramaed.com/>





## Features:

- The tool **aims to save time by centralizing all the data** to facilitate the analysis of academic results, but also those of the students' behavior.
- By analyzing the various learner data, the platform allows educators to **indicate the risk level of each student, ranging from "critical" to "on track"**.
- The **solution offers surveys** to measure students' social-emotional learning. This way, the organization can plan more specific interventions.
- Panorama Education offers several surveys to **collect the opinions and comments of all the stakeholders of a school**, it is possible to compare the results obtained with other schools to consider ways of improving and making the school more attractive.
- The **availability of the analyses with a timeline** makes it possible to observe trends and to prevent and reduce undesirable behavior. Positive behaviors can also be promoted.



Kindergarten ★★☆☆

High School ★★★★★

Elementary School ★★☆☆

University and school ★★☆☆

Panorama Education is a comprehensive tool that has real advantages for a school and its stakeholders :

- It is difficult for a school to know how well its students are doing. This is also true for all stakeholders. The solution proposes the **implementation of different surveys** to know the satisfaction on four domains: students, general school climate, teachers and staff, family. With these different surveys, the school can **realize its strengths and weaknesses**. With a large database, **the school can compare itself to others** and try to improve by analyzing the data. The implementation of Panorama Education demonstrates a real ambition for **improvement on the part of a school**, it also allows **for an increase in influence** if the school is well ranked.
- The tool allows teachers to be **more efficient** with an easy-to-use platform that provides a global view of each student. The solution does not only take into account the academic results, but also **learner behavior**. This way, if a student exhibits undesirable behavior during a class, all teachers can be informed, which represents a **considerable time saving**.
- The analysis of the data, whether it is the academic results or the behavior, **helps to prevent risky behaviors in a preventive way** (harassment, dropping out...). It is a security for the teachers, the students, the school, but also the parents.
- The use of this type of tool allows for the **visualization of the results in a chronological way**, if a new project is set up or if a teacher is replaced, it is much easier to see **the evolution**.

However, you have to be careful on some points :

- First of all, a tool like this can become a new norm with the comparison system between different schools. The schools coming from privileged backgrounds will put forward their score and attract the best students, which produces a virtuous circle. But the flip side of this is that Panorama Education **can accentuate preexisting social differences between schools**.
- The fact that all teachers can see a student's behavior across all subjects can **create misconceptions**. Indeed, if a student has misbehaved in a class because of a dispute with a teacher, this **can affect the subjectivity of all teachers**.





Ready Education is a turnkey solution that takes the form of a mobile application to facilitate life on campus and enable better communication between students and their schools.

### Type

Application to manage campus life as well as school life.

### Competitive advantage

A solution that strengthens the involvement of students in university school life.

### Price

No relevant information was found. The price depends on the size of the establishment.

### Number of users

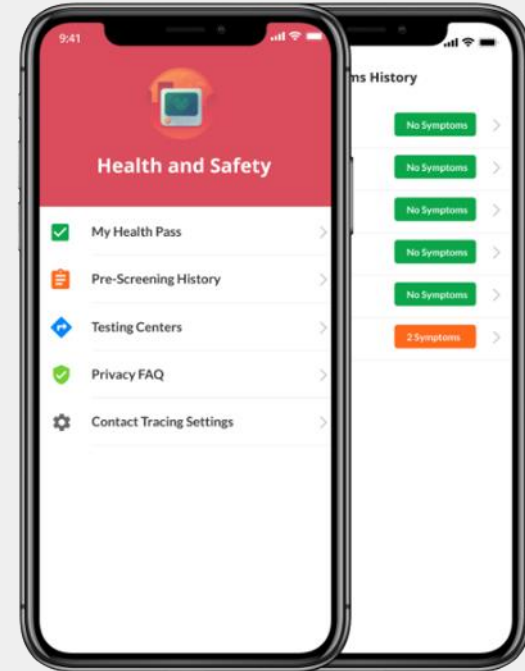
According to the site, the platform claims over 7 million users as well as over 715 institutions in several countries.

### Level of development

The startup was founded in 2012 in Montreal, Canada. It is now mature with a number of employees between 51 and 200.

### How does it work ?

Ready Education is a platform that centralizes all student life and campus information on a single channel. In this way, students can directly access in real time (via an application) their timetable, emails, notes, messages...

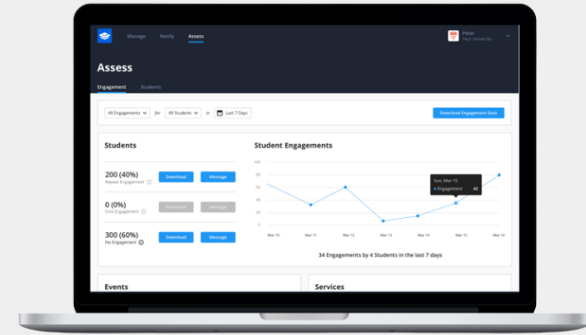


**Link** <https://www.readyeducation.com/>



## Features:

- The **centralization of the different elements of school life** (grades, schedule, absences, finances...) allows the school to save a lot of time and costs.
- The **different contents of the application are adjusted in real time**, the school can directly notify the students concerned when a schedule changes or if a teacher is absent.
- Different statistics are proposed by the solution to **know the contents that generate the most commitment from students**. The institution can therefore learn from these statistics to highlight content that makes people react.
- The **application is customizable and it is possible to broadcast relevant information** according to the type of users selected. Groups can be created for future students, but also for those who have already graduated.
- Ready Education does not replace everything that already exists within an institution. In fact, the **application can be grafted onto the various services present** in the system, notably social networks and other internal information flows that are directly incorporated into the solution.



Kindergarten	★★★	High School	★☆☆
Elementary School	★★★	University and school	★★★★

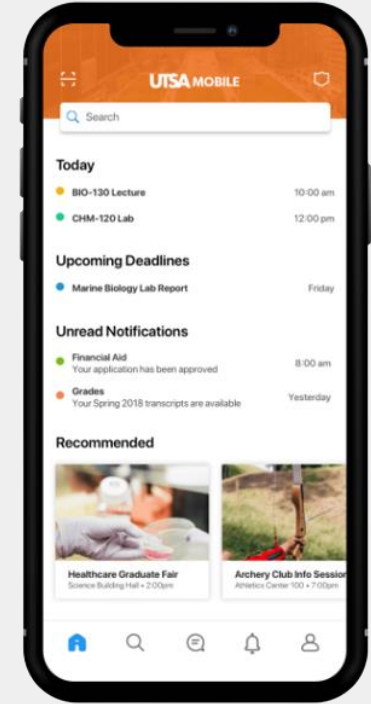


It can be difficult for a school to communicate directly with students. Ready Education is a solution that has many advantages to overcome this problem:

- It can be complicated for new students to become **familiar with multiple communication channels**. Indeed, many institutions offer an email address to communicate with professors, an application for the schedule, another for documents and exercises. Ready Education **centralizes all of these functions**, which makes communication between students and teachers much easier. It also becomes easier for students to see the schedule, the exams, justify absences... **If students are more involved**, then the dropout and catch-up rate should decrease. This decrease can **contribute to the influence of universities and schools**.
- By centralizing all the information, the solution helps to **reduce administrative costs**. Moreover, this cost reduction is accompanied by considerable time saving.
- It is complicated to know if a content appeals to students, but with the various statistics offered by the platform, it is **possible to know the different trends on engagement** in order to better understand certain situations. Moreover, with time, the content can be **more and more relevant**.
- The **availability of different resources** directly on the platform, but also the ability to **differentiate each group of users** is one of the main strengths of the solution. Indeed, it allows to prospect for future students, but also to create a **network with an alumni group**. We can therefore imagine 3 different groups with different contents: a group of future students where the content would be focused on student parties, associative activities... A group composed of current students with job offers, good deals, accommodation... And finally a group of alumni with professional experiences, jobs, feedbacks. Moreover, all this is **accompanied by different statistics** in order to know which content makes the most reaction according to the groups.

Despite the undeniable advantages, the solution may have one major flaw:

- With the implementation of this solution, one has to be careful **not to aggravate the numerical divides** between different students. Indeed, **not all students own a smartphone**, especially students from **less privileged countries**.



Smartest is an application for designing interactive learning modules from documents, such as PDFs or images. This solution uses artificial intelligence to make the creation process much faster.

### Type

Learning module design tool.

### Competitive advantage

The solution is a time-saving way to create and share modules or learning materials such as courses, revision documents or exams.

### Price

No relevant information was found on this subject.

### Number of users

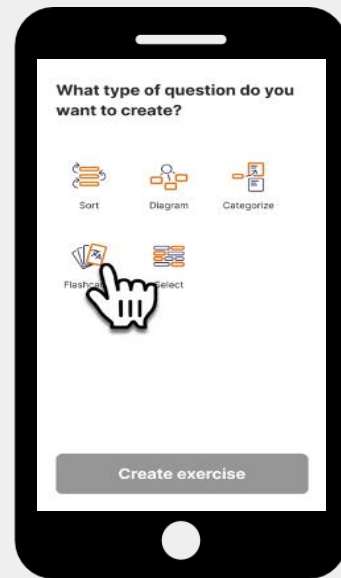
According to Smartest's website, the solution is offered in various educational institutions in Switzerland, including schools and gymnasiums. However, the exact number of users is not communicated.

### Level of development

Smartest Learning was founded in 2019 in Zurich and is part of the InnoSuisse program and a member of the Swiss EdTech Collider. In 2020, the start-up received a funding of CHF 850'000 to develop new features and stimulate its growth. It currently has less than 10 employees.

### How does it work ?

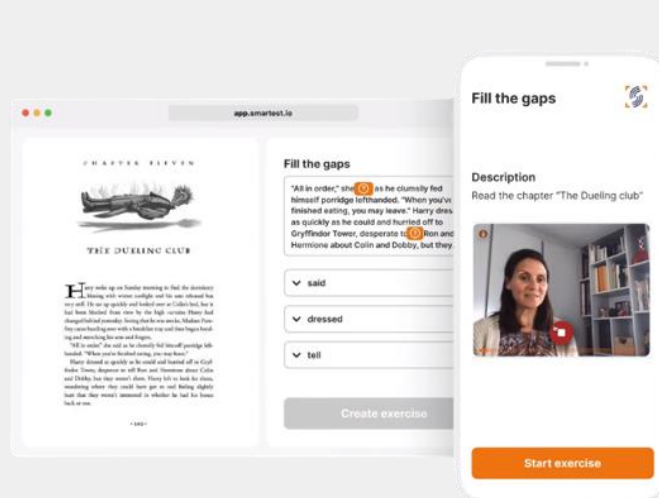
The solution allows you to design lessons using already existing documents. You just have to scan a document with your phone or have it in digital format so that the artificial intelligence can propose a learning exercise. The latter can take several forms such as a text with holes, a map of countries...





## Features:

- The solution allows you to **create content from materials already used by teachers**. It is the solution that adapts to the teacher and not the other way around.
- The use of **artificial intelligence aims to save time**. In fact, all you have to do is scan a document or give one in digital format and Smartets will automatically propose fun content.
- It is possible to **share the different tests** between users. This feature can be particularly useful for teachers to avoid duplicating work.
- It is possible to **incorporate audio on the platform**. A course can be delivered entirely with Smartest by integrating a video, an audio, a text, an exercise and finally a test.
- The solution is **multiplatform**, it can be used on a smartphone, a tablet or a computer.
- This type of tool **diversifies the content offered in the classroom**, which can stimulate learners' learning.
- With greater **simplicity in taking quizzes and exams**, it becomes easier to monitor learners' learning.
- The solution is **available for virtually all subjects**. Teachers and students do not need to change the method or tool every time.



Kindergarten	★★★	High School	★★★★
Elementary School	★★★	University and school	★★★★



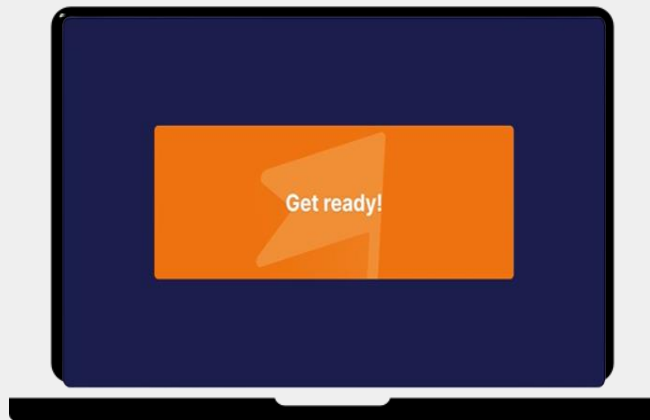


Smartest is a tool that facilitates the work of teachers by simplifying the content creation process. It has many advantages for students and teachers:

- The solution **saves a lot of time** on content creation and more specifically on small knowledge checks. Indeed, the teacher only needs to have a digital document for Smartest to propose content. **This allows the teacher to focus on more qualitative tasks** to improve student learning.
- It is possible to set up an entire chapter, with **different formats** like videos, audios, text and questions. A teacher can start with an introduction where they film themselves, then a YouTube video to give context, a text to analyze, and finally a series of questions to find out the level of understanding. **More diversity in the type of content can stimulate student learning.** One of the strengths of this strategy is that materials come in one single format which avoids disorienting the learner.
- The solution offers live quizzes with the names of the different participants, which helps to **better understand the points that require more explanation, but also the students who are struggling.**
- The tool is **available for most subjects**, which makes it accessible to all teachers. In this way, teachers can share their experiences and will naturally give advice so that the technology can be adapted by as many people as possible. Furthermore, it is possible to exchange the different documents created in order to save even more time.

Although it has more than enough features, the solution has some limitations:

- It is regrettable that Smartest does not develop more the **community aspect**, such as messaging or forums, which could be a real asset, especially with **content sharing**. Indeed, if all teachers could share their lessons, tests, quizzes, then there would be an **increase in creativity, but also a considerable saving of time.**
- The solution can be used for classes composed of **relatively young learners**. Care must be taken not to overexpose students to screens so as not to develop a dependency and a delay in other areas (reading, writing...). In addition, heavy eye strain can lead to ophthalmological problems.





Gimkit is a tool that relies on gamification in order to increase learners' engagement. To do so, the solution borrows its format from game shows.

## Type

A tool that stimulates learning by using the principle of game shows.

## Competitive advantage

A game with an easy grip that helps stimulate the learners' learning.

## Price

Several offers are available depending on the number of teachers who use it. The simple version for use by one single teacher is CHF 60 for one year, another version at CHF 650 for 20 teachers and finally an unlimited version which costs CHF 1000 per year.

## Number of users

No relevant information was found on this subject.

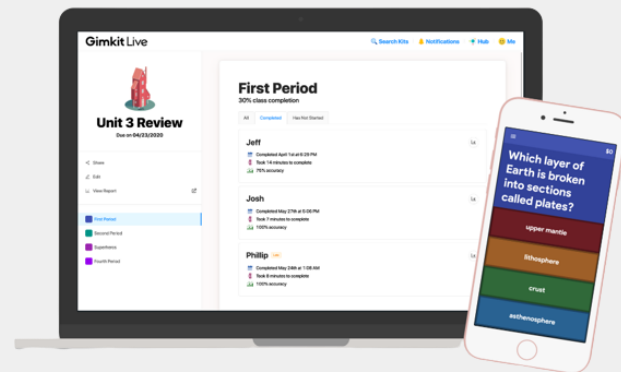
## Level of development

Gimkit is a startup founded in 2018 in the US that currently has 4 employees. The level of development seems advanced considering the interface and the different features the solution offers.

## How does it work ?

Using Gimkit, it is possible for the teacher to create a "kit" with all the students, which corresponds to a TV set. Once the students are connected to the platform, the quiz can start and the students answer question by question. Each correct answer gives virtual money that allows them to buy items such as themes, bonuses...

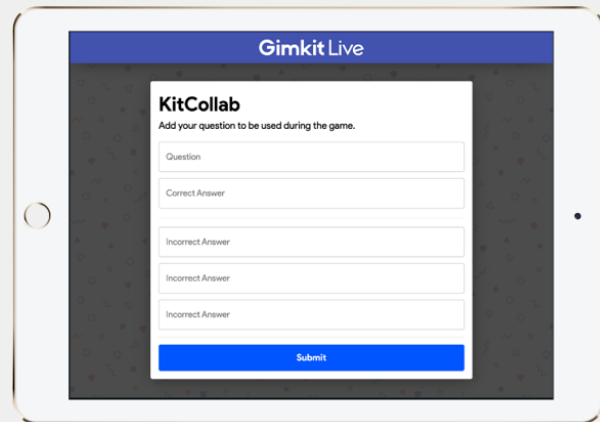
**Link** <https://www.gimkit.com/>





## Features:

- The implementation of Gimkit allows to take the **characteristics of a game show** in order to stimulate the learners, while asking questions previously written by the teacher.
- The solution offers **different game modes in order to increase the engagement rate**. The "classic" mode is an individual competition, the "team" mode allows to create groups of students who will compete against each other, the "floor is lava" mode gathers the learners around a common goal.
- It is possible to use the tool to **design homework assignments** in the form of a questionnaire. The solution can also be used as an evaluation tool, even if this is not its primary objective.
- Gimkit helps to **know the level of cohesion in a class**, but also to reinforce it with different game modes.
- The platform is **supported by several platforms** that allow learners to use it on smartphone, tablet and computer.
- The **ease of use of the tool**, which does not require special computer skills, is a strong point, making it within the reach of every teacher and student. Moreover, it works with a questionnaire which makes it usable for all subjects.
- It is possible for teachers to **share their quizzes on the platform**, and for other users to download the games proposed by other teachers. This represents a time saving for the entire teaching staff.



Kindergarten	★★★	High School	★★★★
Elementary School	★★★	University and school	★★★★



Gimkit relies on classroom gamification to increase learner engagement. The solution has definite advantages :

- It can be difficult for a new class to break the ice, especially for students entering a new cycle. This is also true for teachers. **Implementing a class-wide game can create greater cohesion from day one.** The solution can help even the most shy students better integrate. In addition, the quiz questions provide a way to **see how much each student has learned.**
- The change in educational practices allows for **greater student involvement.** Indeed, by **diversifying the materials,** teachers stimulate the learners. This is especially true since the solution offers several game modes. Moreover, **it allows to foster interaction between students and the teacher** so that the course is not only perceived vertically.
- Gimkit's gaming mechanisms such as the monetization system give students **extra motivation** to do their homework and master the curriculum. One can imagine that the student who has the most monetary value in the game can win a "prize" in the real world such as a treat or an extra point on an assignment for their involvement.
- The solution allows for homework assignments to be set up. This allows to **check in a playful way** (in the form of a quiz) if they are well done and if the different notions are well understood.
- The **"sharing" function of the platform encourages teachers to share their questions and thus their own quizzes** with all users. It is also possible to find published content via a search bar, which saves time and **efficiency for teachers.**

However, this solution has some limitations :

- As explained above, this learning method can reinforce class cohesion, especially with students who do not know each other. However, the opposite effect is also possible with students who have **difficulty socializing and are excluded from the class.**
- For this solution to be used optimally, each student must have either a smartphone or a computer. **This can facilitate the stigmatization of students** who do not have access to digital tools. It is always possible for the institution to purchase the equipment, but this represents an **additional cost.**
- Finally, it is important to limit the use of this type of tool. Indeed, students are already very busy with the screen all day long. This type of solution **must be implemented sparingly.**

