



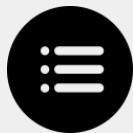
LEPOLE

EVOLUTION OF EDTECH BUSINESS MODELS

Prospective monitoring
September 2023



Summary of the September 2023 edition



Definition of Edtechs



Methodology



Trends Analysis

Quizlet

Quizlet is a platform that lets you set up fun quizzes for students to make lessons and assessments more stimulating.

CONSTRUCTOR

Constructor is an all-in-one learning platform that makes it easier for learners to understand, but also easier for teachers to work with, thanks to a range of products.



Parentsquare is an instant messaging system that connects learners, teachers and school administrators by incorporating additional features.



Classowl is a learning management system (LMS) designed to simplify classroom management, but also to stimulate learner engagement with interactive assignments.

newsela

Newsela is a platform offering a range of reading content on specific themes or subjects, and there are 5 reading levels to suit all students.



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. This 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 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 OUR 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 report
"Global education monitoring report, 2023 : technology in education: a tool on whose terms?"

UNESCO has published a comprehensive report on the impact of new technologies on education and learning. It examines the educational challenges to which appropriate use of technology can provide solutions (access, equity and inclusion; quality; technological progress; system management), while recognising that many of the solutions proposed can also be detrimental.

Nouvelles marquantes



Ukrainian EdTech has **raised USD 70 million** in new funding to "enhance" 35'000 tutors with AI capabilities. This latest funding brings its Series C funding round to USD 120 million.



GoStudent

The Vienna-based EdTech platform is raising **USD 95 million** in equity to extend its blended learning solutions to the DACH region (Germany, Switzerland and Austria).



London-based artificial intelligence start-up Kinnu has raised **USD 6.5 million** in a new funding round.



VUIHOC, an educational technology start-up, has announced an investment of **USD 6 million** in a Series A funding round led by TNB Aura.



Quizlet is a platform that lets you set up fun quizzes for students to make lessons and assessments more stimulating.

Type

Platform that facilitates and optimises the creation of questionnaires.

Competitive advantage

Quizlet simplifies the creation of quizzes to make lessons more fun and interactive.

Price

The solution is free, but offers a freemium package called "QuizletPlus", which includes customisation, advanced creation tools, pre-designed exercises and ad suppression. This offer costs CHF 25.99 for a one-year subscription or CHF 6 for a one-month subscription.

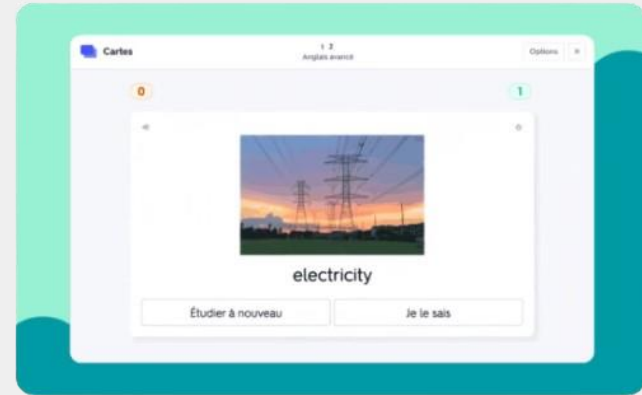
Number of users

The platform boasts 60 million learners and over 3 billion study sessions.

Level of development

The company was founded in 2003 by Andrew Sutherland. In 2020, Quizlet closes a Series C round of USD 30 million (CHF 26.2 million) and reaches a valuation of USD 1 billion (CHF 872 million). According to its [LinkedIn](#) page, the company employs between 201 and 500 people. It is therefore at a very advanced stage of development.

Link <https://quizlet.com/fr-fr>



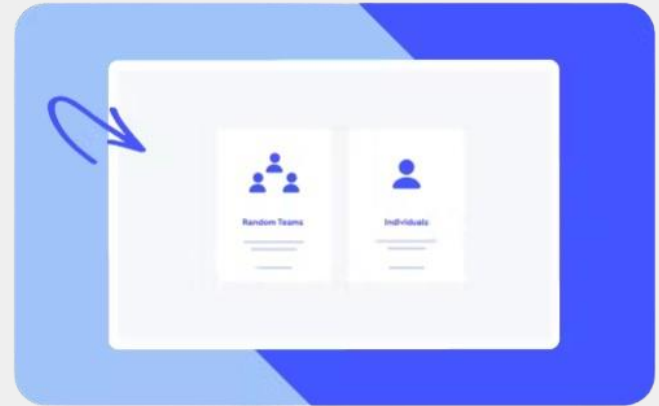
How does it work?

Teachers can choose to create their own questionnaires or use those provided by the platform or by other users. The teacher then gives the link or QR code to the learners so that they can access the questionnaires. The teacher has the choice of creating his or her own questionnaire or using those provided by the platform or by other users. The teacher then gives the link or QR code to the learners so that they can access the questionnaires. The latter can be completed directly in class or as homework.



Features :

- The solution is **available on a range of platforms** : computers, tablets and smartphones. An application is also available on the [App Store](#) and [Google Play](#).
- Content creation is simplified to save teachers' time. What's more, the tool appears to be **suitable for all subjects**, with the possibility of integrating complex functions for mathematics or images and shapes for geometry.
- The platform **has a live section called "Quizlet Live"**, so students can see their progress directly in class.
- It is possible to set up a **competition mode with different rules**. This can be done individually or by team.
- Quizlet **provides various statistics** at the end of the quizzes, including the number of correct answers per student and per question.
- The 'Live' mode automatically generates a quiz in a few seconds for each subject.
- Content is **already available on the platform** and selected by experts, for example for TOEIC revision. Teachers can also publish their own quizzes for the benefit of the whole community.



Kindergarten ★★★

High School ★★ ★

Elementary School ★ ★ ★

University & school ★ ★ ★



Not all learners have the same comprehension skills. That's why it makes sense to offer different ways of learning. Quizlet offers learning through quizzes to stimulate students, and according to the platform, "90% of pupils and students who work with Quizlet see their grades go up". Although this figure should be treated with caution, this solution does have a number of advantages :

- The tool seems **relatively easy to use**, even for people who are not comfortable with computers. What's more, **all subjects are covered**, even those requiring special formatting, such as maths and geometry. In this way, if a teacher has mastered the tool, he or she can help other teachers to adopt it.
- It is possible to use questionnaires that have already been produced by other users, and the tool also makes available fun questionnaires that have been pre-checked to be suitable for schools, as well as for various competitions such as the Baccalaureate, IELTS, TOEFL, TOEIC, etc. This has two major advantages. Firstly, **it saves the teacher a considerable amount of time**, but it also diversifies the sources to make the course more attractive.
- One of Quizlet's greatest strengths is that it **brings a new teaching method to students**, stimulating them and increasing their level of engagement, with **much more interaction**, particularly in 'live' mode. Offering quizzes makes homework or lessons more interactive, leading to greater involvement and potentially better academic results. What's more, setting up competitions, whether in teams or individually, stimulates the whole class. The system of anonymity **avoids stigmatising students with difficulties and limits social pressure or fear of failure**.
- By making the results available after the tests, you can **see the overall level of the class**. The solution offers a range of independent questions, which again saves teachers time.
- Finally, one of the significant advantages of the platform is that **it can be adapted to all types of teaching** : face-to-face, distance or hybrid.

However, there is still room for improvement :

- It's a shame that the **community aspect isn't more developed**, as the platform has great potential for bringing teachers together, particularly those in the same subjects. In this way, there would be exchanges that would raise the quality of teaching for the whole teaching staff.



Constructor is an all-in-one learning platform that makes it easier for learners to understand, but also easier for teachers to work with, thanks to a range of products.

Type

All-in-one learning platform.

Competitive advantage

The tool offers features that stimulate learners, such as the "laboratories" mode, making it easier for teachers to create content.

Price

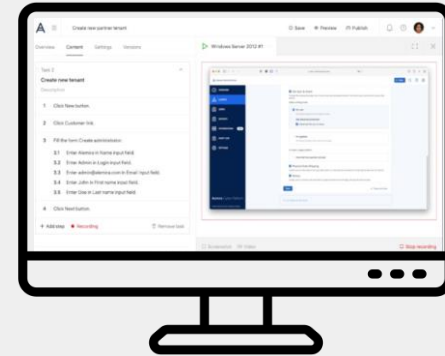
No relevant information was found on this subject. It seems that this tool can only be installed on the basis of a quotation and depending on the various functions.

Number of users

No relevant information was found on this subject. The website highlights partners such as Acronis, Virtuozzo and the Technical University of Milan.

Level of development

Constructor is a Swiss company founded in 2019, and was originally called Alemira. Today, it has between 51 and 200 employees according to [LinkedIn](#) and seems to be at a fairly advanced stage of development.



How does it work?

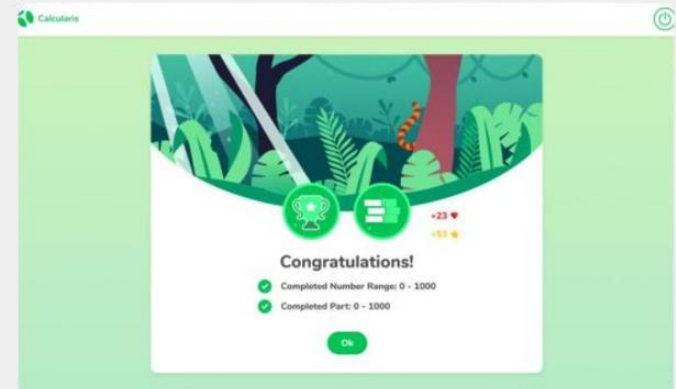
Constructor offers several products :

- **Proctor** makes it possible to take online exams securely.
- An **LMS** that converts complex subjects into interactive content.
- A **laboratory mode** for putting knowledge into practice.
- **Classroom**, which facilitates the creation of online courses.
- **Grafari** develops learners' spelling and can also improve phonetics.
- Finally, **Calcularis** helps with mathematical understanding.



Features :

- Artificial intelligence makes it possible to **create avatars** in the image of teachers.
- The platform offers a **means of online assessment, with artificial intelligence monitoring** to detect any attempts at fraud.
- The solution offers a streamlined environment where all course content is online. **Various statistics can be obtained** to track changes in student engagement.
- A "laboratory" mode is available, particularly for learning programming languages. Students complete the exercises directly, and the tool provides corrections if necessary. **Assessments can be marked automatically.**
- It is possible to **create a 'laboratory' mode** quite simply and for all subjects. **Students can also work together** to facilitate group work. Once again, **analyses are omnipresent** to improve the experience and monitor learner performance.
- **The 'classroom' mode makes online courses much easier**, with the integration of a **number of features** such as the availability of collaborative tables, the ability to simply record the course as well as the discussions, etc.
- Grafari (Phonics) introduces writing skills, while Grafari (Orthograh) focuses specifically on spelling practice. Calcularis aims to master the fundamental principles of mathematics. These 3 tools all aim to **develop the skills of the very young through gamification.**



Kindergarten	★★★	High School	★★★
Elementary School	★★★	University & school	★★★



In most cases, teachers do not have enough time for all the students, and this phenomenon is even more prevalent in universities, where a teacher has to teach several hundred students. This makes it difficult to involve all the students, particularly when the courses are distance learning. The Constructor learning platform has many advantages, for both face-to-face and online courses :

- One of Constructor's greatest strengths is that it offers a virtual laboratory for organising guided practical workshops. This type of content can be generated automatically and step by step by capturing the process in the software. This **saves time for teachers**, but also ensures that all teachers are able to use the tool. To further increase the efficiency of the tool, **the grading system is automatic, with immediate feedback on learners' actions. This type of learning can really benefit learners**, especially those who need to practice to understand. What's more, this exercise can be carried out in collaboration with other students, which can further increase motivation.
- Most of the features offered by the solution include a wide range of statistics to measure learner engagement. This information is invaluable for teachers and schools. Based on the results, **it is easy to identify the subjects and exercises that are most stimulating**. It becomes possible to modify a programme or assignments to keep only the most effective. Assessments supervised by artificial intelligence can be beneficial and **represent a reduction in (financial) costs for schools**.
- Even if face-to-face classes are once again the norm, the features offered by the online classroom are interesting and make it **possible to make videoconference lessons more captivating**. The ability to create an avatar is also a good practice that **can enable more interaction**. It is possible to imagine a lecturer who is unable to come to the classroom to meet the students, and take advantage of the various features offered by Constructor's "classroom mode".
- Providing games for the youngest pupils is a good way of fostering an **appreciation of spelling, phonetics and mathematics**.
- It should also be noted that, in addition to the learning platform, the solution offers two products to **facilitate and digitise administration**. On the one hand, it centralises payment methods, invoice management and so on. And on the other, different analyses of graduation rates, simplified enrolment processing, the ability to update information on former students, and so on.

However, there are two points to bear in mind :

- For this type of tool to work, it is essential that both students and organisations have high-quality IT equipment. This can **represent a high cost for the school, but it can also accentuate the digital divide** that already exists among students.
- It is important not to **expose children to screens too early**. It seems sensible to offer this solution only as a complement to traditional learning methods.

ParentSquare is an instant messaging solution designed to connect learners, teachers and school administrators, while incorporating a number of interesting features.

Type

Instant messaging.

Competitive advantage

The solution increases interaction between the various stakeholders in a school.

Price

Prices are based on an annual fee per student, plus a one-off integration fee. Packages start at USD 3,600 (CHF 3,200) per year for up to 600 student enrolments. If the features are customised and the number of students is high then the price increases.

Number of users

According to the 2022 retrospective available on the official website, more than 6.5 million students are using the solution.

Level of development

The company was founded in 2011 by Anupama Vaid, a software engineer. ParentSquare officially launched its eponymous product in 2014, with consistent year-on-year revenue growth of around 100%. The tool is present in more than 40% of California districts. ParentSquare has raised a total of more than USD 12 million (CHF 10.7 million) over five funding rounds since its inception. The company employs more than 100 people, demonstrating its advanced level of development.

Link <https://www.parentsquare.com/>



How does it work?

The main aim of the platform is to facilitate communication between teachers, the school and parents. It is possible for each of the parties involved to send messages, as with traditional instant messaging. Additional functions are available, such as mass notifications, parent-teacher conferences, sending authorisation forms, etc.

Features :

- The solution **enables schools to send alerts that are broadcast to everyone** or to a targeted group such as a class, sports team, etc.
- It is possible to **share content from social networks** or a website without having to share a password.
- ParentSquare lets you **send content and newsletters to different groups**, as well as tracking the number of views, likes and comments linked to the content.
- **Alerts are sent automatically by the platform if a pupil is not present**, after which parents can 'excuse' their child directly from the application (or by SMS or e-mail).
- A wide range of **documents can be sent using the platform**, including forms, invoices, notes, etc.
- **Making appointments has been simplified** with specific functions, particularly for parent-teacher meetings, setting up voluntary work, etc.
- Parents and teachers **can be contacted directly by message**, and **telephone calls can also be made**.
- The solution **features reports and statistics** to measure the level of commitment from all stakeholders.



Kindergarten	★★★	High School	★★★
Elementary School	★★★	University & school	★★★

Communication between parents and schools is often quite complex, and the larger the number of students, the more complicated it becomes. This can be frustrating for families and teachers alike. In addition, the way in which learners and teachers communicate is very vertical, which limits interaction. ParentSquare tries to make communication simpler and has a number of interesting features :

- The use of instant messaging **allows a greater number of interactions** between the various stakeholders in a school. A teacher can contact a pupil's parents directly, **which saves time**. Similarly, parents can contact the administration or teachers to obtain more precise information about documents, which **increases their involvement**.
- **It becomes easier for the school to reach all parents** with an alert or a grouped message, as many more people will be able to obtain the information. In many cases, announcements are sent by email, and many people do not check them. The information is **therefore transmitted much more directly and is more likely to be read**.
- The ability to send ads and newsletters automatically is a strong point of the solution. This type of functionality can really **improve the quality of an establishment** by providing details, suggesting activities, etc. What's more, statistics can be **used to identify the most engaging content**, as well as the best time to send it so that it is read.
- Making appointments and **sending documents directly via the platform saves a considerable amount of time for the school administration**, teachers and parents. There is no longer any risk of the learner losing the document or forgetting to return it on time.
- Being able to notify if the child is not in class **creates a feeling of security**, and it is also possible to justify the student's absence directly. This feature is a **real asset for schools** wishing to reassure parents looking for security for their children.

However, the solution has several limitations :

- The initial aim is to increase interaction between schools and parents, thereby increasing the latter's involvement in their children's schooling. However, this type of solution can greatly increase social inequalities. First of all, people who are not comfortable with digital tools and who do not have a smartphone are unlikely to use this communication opportunity. On the other hand, parents who were already heavily involved in their children's schooling will be even more so. On the other hand, parents who do not have the time or who are not concerned about their children's school results are unlikely to use this type of tool. It's easy to see that **the social inequalities that already exist can be accentuated**.
- One potential pitfall is **the additional burden placed on parents this tool may create** if they are able to contact the teacher directly.
- Finally, it's a shame that the platform **doesn't offer a more advanced diary function**, like Remind. The latter makes it possible to identify the various dates on which pupils have to hand in their homework, which encourages parents to get more involved in homework.



ClassOwl is a learning management system (LMS) designed to simplify classroom management, but also to stimulate learner engagement with interactive assignments.

Type

Learning Management System (LMS).

Competitive advantage

The management tool makes it possible to centralise a great deal of information on a single platform, as well as offering some interesting features to make life easier for teachers or to stimulate student involvement.

Price

There are a number of pricing options depending on the size of the school, with a sliding scale of marginal costs. For a school with 5 students, the price per month per student is CHF 5.8, a total of CHF 348 per year. For a school with more than 500 students, the price per month is CHF 1.3, a total of CHF 7'816 per year.

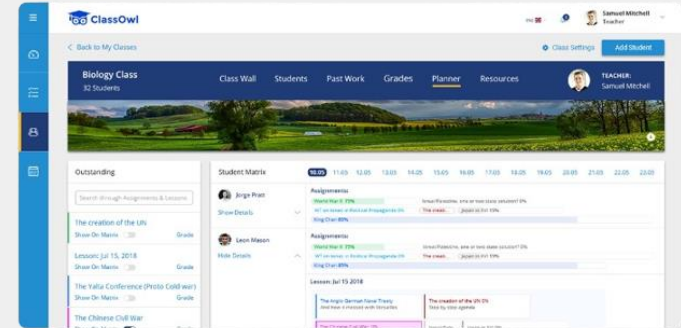
Number of users

No relevant information was found on this subject. However, the [Aurum public school](#) in Zurich uses this management system.

Level of development

ClassOwl is an EdTech startup founded in 2013 by Noah and Alex, aged 18 and 17 respectively, in their final year of the IB programme at Zurich International School. The company was subsequently acquired by [Branch Metrics](#) (USA), a portfolio company of Cowboy Ventures and New Enterprise Associates. ClassOwl had raised approximately USD 900,000 (CHF 802,180) from investors prior to the acquisition.

Link <https://classowl.com/>



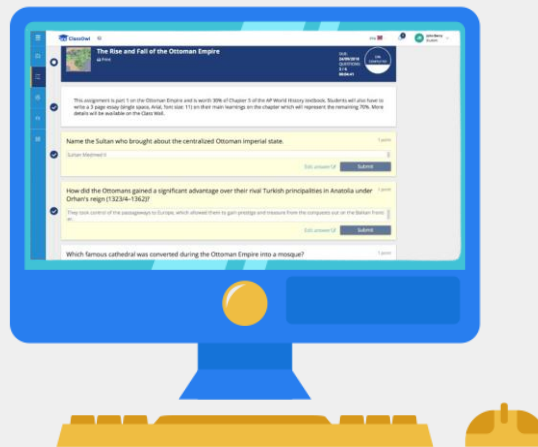
How does it work?

ClassOwl is a management system that can be integrated into a school, with each individual having a login to connect to the platform. All the profiles have different functions to make life easier for teachers, students, parents and school staff.



Features :

- The management system **provides a timetable** in the form of a calendar for both students and teachers. Assignments and due dates can be incorporated into learners' calendars.
- The various **documents are available online on the platform**, including lessons and assignments. It is also possible for learners to **submit their documents online** (homework, tests, etc.).
- Parents can use a special 'portal' to **get an overview of grades**, tests and teachers' comments.
- The tool can be used to **set up interactive assignments** such as group work, class exercises, quizzes and so on.
- Teachers can **customise lessons** for different classes, groups of students or even individuals.
- The solution is **available on two types of medium** : tablet or computer.
- It is possible to **increase collaboration** between teachers by grouping or creating a new subject.
- A questionnaire mode is **available for automatic marking** of submitted assignments.
- The solution **enables teachers to communicate better** with their students by sending messages. The reverse is also true, with **students able to ask teachers directly for help**.



Kindergarten ★★

High School ★★

Elementary School ★★

University & school ★★



The proliferation of medium types is an obstacle to productivity, both for teachers and, more particularly, for learners. ClassOwl tries to incorporate some interesting features to make life easier for everyone involved :

- One of the greatest strengths of this management system is its **ability to centralise many of the needs** of the various stakeholders in a school. The calendar function replaces the diary for pupils, but also makes it easier for teachers to organise their lessons. This functionality is coupled with a "deadline" system to **remind students when their reports are due**. Still on the subject of centralisation, the ability to post course documents directly online and **for learners to hand in assignments on the platform** is a real advantage.
- More cross-functional means of communication mean **greater responsiveness** from teachers and **greater motivation from learners**. Parents also have the opportunity to read comments and take direct note of grades and homework assignments. It seems logical that this type of mechanism should lead to greater parental involvement in students' school life. Last but not least, communication is also facilitated between teachers, who can create common groups for different classes, and in this way, new and interesting collaborations can emerge.
- Interactive assignments, such as group work or quizzes, **stimulate learner engagement**. What's more, assessments carried out in the form of questionnaires can be corrected automatically, **saving the teacher a great deal of time** and enabling him or her to offer more qualitative teaching.
- Setting up this type of platform can send out a **strong signal about a school's image**, particularly when it comes to digitalisation. Indeed, many schools are not very advanced when it comes to digital development. What's more, the ability for parents to keep an eye on their children's educational progress may **encourage them to choose one school over another**.

Although it has the advantages listed above, the management system has certain disadvantages :

- To take advantage of this type of solution, it is essential that the facility and all its stakeholders are equipped with IT tools, and that they are all able to use them correctly. If the establishment is not sufficiently equipped, **the purchase of numerous computers or tablets can be costly and therefore prohibitive**. What's more, this can accentuate the digital divide already present among students.
- This type of platform encourages learners at a very early stage to make constant use of IT tools, and digital tools in general. With artificial intelligence tools such as ChatGPT, it's becoming increasingly **complex to know whether it's the student or a conversational agent using artificial intelligence who has written the assignment**. This **type of tool limits students' capacity for analysis**, not to mention the **ever-increasing dependence on digital technology**. This is why it seems appropriate to offer mixed content, while retaining handwritten assessments.





Newsela is a platform that offers a range of reading content on specific themes or topics, with 5 reading levels to suit all students.

Type

content library.

Competitive advantage

With just a few key words, the platform offers a wide range of content that meets school standards.

Price

According to the [360 quadrants](#) website: "Newsela prices depend on the plans you choose. The professional price of Newsela can be estimated at USD 6,000 per school, USD 2,000 per grade and USD 18 per student per year. However, you should contact the company for the exact price of Newsela depending on the customer's needs and the number of students."

Number of users

According to the official website, over 3.3 million teachers and 40 million students have registered with Newsela, mostly in the USA.

Level of development

Matthew Gross decided to launch Newsela in 2013. In 2021, the platform announced that it had raised [USD 100 million](#) (CHF 89 million) in a Series D round. The financing was led by new investor Franklin Templeton and brings Newsela's valuation to USD 1 billion (CHF 890 million). Today, Newsela is one of the leading companies in the dematerialisation of school textbooks.

Link <https://newsela.com/>



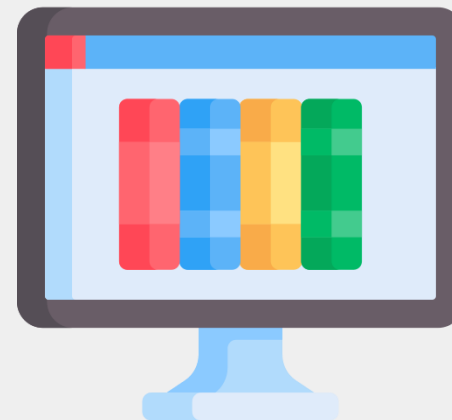
How does it work?

The teacher logs on to the platform and enters keywords to define a specific topic or theme. Newsela then provides reading content for students, with different levels of difficulty.



Features :

- You can **set up a digital environment or print out the various documents.**
- The solution offers **5 reading levels** with texts of varying degrees of complexity. Difficulty seems to be assessed according to lexicon and writing style.
- Newsela **offers a very large number of readings and articles for all themes** and subjects. What's more, the library is regularly updated with current articles.
- **Content is checked beforehand** to ensure it is consistent with the curriculum, but above all to be relatively neutral so as not to politicize a class.
- The tool can be used to **set up questionnaires** on a subject or an article, which acts as an assessment. The latter is **corrected automatically.**
- With Newsela's settings, school administrators can manage the visibility of pedagogical content to ensure that teachers and students have access to **texts that comply with pedagogical guidelines and objectives.** In addition, annotations can be made to aid comprehension.
- The **solution offers engaging resources to stimulate learners.** The first contents arouse students' curiosity, then as time goes by, the articles become more refined in their analysis. The aim is not to discourage the reader with the first reading.



Kindergarten ★★★	High School ★★★★★
Elementary School ★★★★★	University & school ★★★★★



In order to present a document to a class, it's essential that it complies not only with institutional standards, but also with those of the educational program. Providing a quality document that is suitable for all students and respects the various constraints is a complicated and time-consuming task. Newsela meets this specific need with a number of strengths :

- The solution offers a very large quantity of text that has already been checked and fits perfectly into the curricula. This eliminates the need for teachers to check that all documents are appropriate, which **not only saves time but also provides additional security**. What's more, by simply entering key words, you can obtain a corpus related to the subject, and recent articles are proposed **to keep you up to date**, which is stimulating for both students and teachers. If learners are more interested, then **academic results should improve**. This tool **is also suitable for all subjects, and therefore all teachers**.
- The platform offers five reading levels based not only on lexicon, but also on writing style. So, whatever the learner's reading level, it's possible to read texts with the same theme for the whole class. As a result, **classes become more inclusive**, and each student can read at his or her own pace and progress. **This stimulates learner commitment to reading text**, which is becoming less and less present in some schools.
- The use of questionnaires enables us **to observe whether students have fully understood the subject**. They are automatically graded, which limits the amount of time wasted on correction, so that students can concentrate on more qualitative tasks such as explaining the context or analyzing a subject.
- It is possible to add annotations explaining the passage of text. This completes the reading process, **helping you to better understand what an author or article is saying**.
- Newsela offers a print function for documents, and courses **can be offered as conventional face-to-face or distance learning courses**.



However, this solution does have its limitations :

- According to opinions left on various websites, it seems that the introduction of graded questionnaires is not the most efficient way of assessing students. Indeed, many of them, and even some teachers, explain that the number of questions is sometimes too small to be representative of a text's comprehension, **resulting in approximate grading**. In addition, this forces us to set up a multiple-choice questionnaire, which **limits the type of response**. It makes sense to use this feature only to observe the general level of comprehension of the class, rather than to use it as a real test in a grading system.
- Finally, it may be useful to occasionally present articles or texts that are a little out of the ordinary, in order to **stimulate learners and cultivate a critical mind**.