



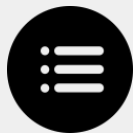
LEPOLE

EVOLUTION OF EDTECH BUSINESS MODELS

Prospective monitoring
June 2023



Summary of the june 2023 edition



Definition of Edtechs



Sylva is a learning and assessment platform that automates part of the content creation process for teachers.



GetMoreBrain is a platform that integrates instant messaging to make exchanges more interactive and facilitate communication and collaboration.



Methodology



Pear Deck is an online presentation software that takes the features of PowerPoint or Google Slides and incorporates new functionalities.



Screencastify is a video screen and webcam recording program, packed with features that make video creation easy.



Trends Analysis



Civitas Learning is a platform that centralizes all school data for analysis and decision-making.



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 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 rapport
"EdTech And Smart Classrooms Global Market Report 2023"

"The Business Research Company" has published a comprehensive report on market developments for companies involved in education technology (EdTech). The global market for educational technologies and smart classrooms has grown from USD 140.24 billion in 2022 to USD 162.89 billion in 2023. The market for educational technologies and smart classrooms is expected to reach USD 304.63 billion in 2027, with a CAGR of 16.9%.

Nouvelles marquantes



Indian EdTech has raised **USD 250 million** in new funding and is on the verge of securing a further USD 700 million. Byju's has maintained its valuation at USD 22 billion throughout the past year.



The Oslo-based EdTech platform has secured **EUR 4.1 million** in a Series A financing round. The platform initially offers homework help and physical education to students.



The startup has secured **USD 8.5 million** in funding. The Tel Aviv-based EdTech company will use the funding for staff expansion and product development.



The leading Arabic online video learning platform has raised **USD 10 million** in financing to accelerate its growth towards its goal of serving 10 million learners.



Sylva: Easily create and modify course materials

Sylva is a learning platform that automates part of the content creation process. It also makes it possible to set up an automatic assessment system, to maximize teachers' time.

Type

Platform that optimizes content creation.

Competitive advantage

Sylva not only facilitates the creation of documents, but also makes them more dynamic, using a variety of media (photos, videos, audio, etc.).

Price

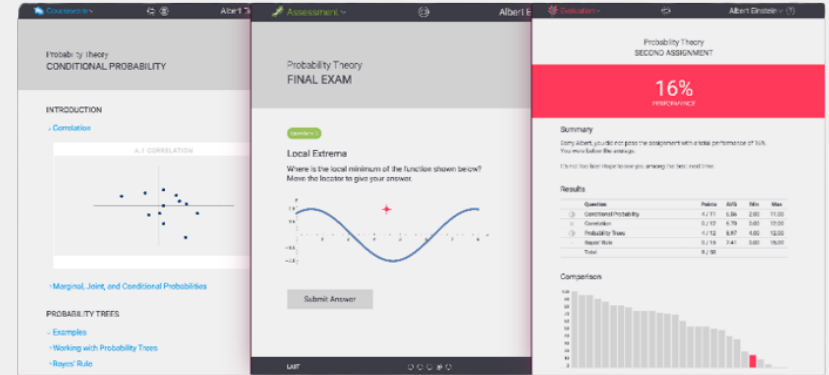
No relevant information was found.

Number of users

No relevant information was found. The website does not highlight the potential **number of** organizations that can use the platform.

Level of development

Sylva is a start-up co-founded in 2019 by Maik Meusel and Christina Richard in Zurich. It was awarded a first-round Venture Kick prize in May 2019 and won CHF 10,000 as well as training to develop their business ideas, in the same year it was victorious in the second Venture Kick round and won CHF 40,000. In 2020, she won another Venture Kick prize of CHF 150,000. According to information available on LinkedIn, the start-up currently employs between 2 and 10 people.



How does it work?

The teacher logs directly onto the platform with his or her credentials, and can then create different content using existing templates. All they have to do is enter the information required for their course. A wide range of media can be easily incorporated, including videos, photos and audio files. All documents are stored online and can be consulted by students once authorized. The same principle applies to exams, which can also be corrected automatically.



Features :

- The solution makes it as **easy as possible to create content**, simply by placing titles and texts in the various identified categories. **Various types of media** can be incorporated directly into the document.
- In addition to creating course documents, it is also possible to **design exams** with multiple-choice or free-response answers.
- The tool provides a **range of statistics** to give a clearer picture of the general level of the class, or to highlight students in difficulty. It is also possible to **personalize and modify evaluation questions** to discourage cheating.
- The platform **features a ranking system** to stimulate learners' competitive spirit.
- **Team assessments can be set up** to facilitate collaboration between students.
- Sylva archives content in its cloud, but it's also **possible to work offline** and save changes when the teacher has an internet connection again.
- Students **can raise objections** directly from their assessment reports.



Kindergarten ★★

High School ★★

Elementary School ★★

University & school ★★



Sylva: Easily create and modify course materials

Working with the same type of document can be daunting, but setting up dynamic content is time-consuming and can be relatively complex. For example, it's difficult to incorporate multiple types of media within a course. Sylva addresses this problem by making it easier and less costly for teachers to create documents:

- Obtaining templates that have already been designed makes them **very easy to use**, even for teachers with little computer experience. The solution allows a very **large number of customizations** to make the course much more dynamic. It's even easier to incorporate different types of media within the same chapter. We can imagine a section that starts with text, then a photo or images to illustrate, and finally a YouTube video for those who want to learn more. Even for math, Sylva offers easy formatting solutions to incorporate equations, graphs, geometry, etc. directly.
- The introduction of ungraded continuous assessment tests **makes it easier to identify the various issues students might face in understanding the course**, particularly with the statistics offered by the solution. What's more, just like exams, correction can be automatic, **saving teachers a considerable amount of time**. Assessments can also take different forms, such as multiple-choice answers or open-ended questions.
- **Bringing all the documents together on a single platform** is an undeniable advantage for this type of medium, as it **avoids multiplying the number of channels** and makes it easier for students to get to grips with them, particularly those who are not used to using different digital tools. What's more, it's also possible for teachers to **work without an Internet connection**, which is a real advantage for teachers who are often on the move.
- The grading system and the teamwork system enable **different synergies** to be achieved, depending on the teacher's preferences, as well as those of the students.
- Finally, one of Sylva's greatest strengths is its ability to accommodate all types of teaching. In fact, it complements traditional learning by enhancing course materials, and is perfectly suited to blended learning with an online and face-to-face component. Finally, it can also be used for purely distance learning courses, making it a **highly versatile tool**.

However, this solution does have one drawback:

- If the school's Internet connection or Sylva's website were to fail, teachers **would not have access to their course materials**. In the worst case, a teacher could **lose all his or her data**.



GetMoreBrain is a platform that integrates instant messaging to make exchanges more interactive, facilitating communication and collaboration between the school, teachers and learners.

Type

Messaging-based learning platform for increased interaction.

Competitive advantage

The solution takes the codes of well-known messaging systems, while adding features to meet the needs of the educational world.

Price

No relevant information was found.

Number of users

No relevant information was found. The website mentions partners such as AWS EdStart and Swiss Edtech Collider.

Level of development

The start-up will be founded in 2021, the same year GetMoreBrain secured CHF 2.5 million in seed funding. It currently employs 11 people, according to the website.

How does it work?

The platform takes the form of a WhatsApp-style messaging system, enabling learners to chat directly with their teacher or the school administration. Documents, quizzes, challenges and learning paths can all be uploaded directly from the platform.





Features :

- The platform is **available on several media** : web page, smartphone and tablet. An application has been found for the Google Play store, but not for the App Store (Apple products).
- Messages can be sent to **various members of the organization** : teachers, students and, if the school so desires, to the administration.
- Teachers can create quizzes and challenges.
- GetMoreBrain makes it easy to **share a wide range of content**, from course documents to photos, videos and audio files. What's more, it's possible to set up a learning path to better grasp the different themes and chapters.
- The solution relies mainly on text messaging, but it is also possible to **communicate with voice messages or record a video**.
- **Several profile types are possible**, including learners, creators, coaches, organizations and developers. Each profile gives access to **specific functionalities**.
- **Learning content is offered** either free of charge or for a fee, to facilitate the transmission of quality documents. The platform features an academy tab for specific documents, and a library tab providing access to books.
- The tool provides **artificial intelligence** to help perform and automate various tasks.



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



The lack of communication, but also the very vertical nature of teaching in higher education is one of the main criticisms levelled at it, particularly by students. GetMoreBrain aims to increase the number of interactions between students and professors, as well as the administration :

- Implementing this type of tool **increases interaction** between students and teachers. This means that information can be obtained more quickly, which can increase student engagement and therefore **reduce absenteeism**, but also potentially **improve academic results**. A teacher can send a message directly to a student if he or she is not attending class regularly, thus reducing the likelihood of students dropping out.
- Document sharing **reduces the need for multiple platforms** to transmit content, which is an advantage for learners and teachers alike. What's more, it's possible to create a "learning path" to incorporate different course elements and chapters. With this type of methodology, it becomes much easier for students to understand and retain a chapter, especially for those who need structured content.
- Direct communication with the administrative department **can save a considerable amount of time**. In most cases, to solve a problem, we have to communicate by e-mail, which takes a lot of time depending on the complexity of the problem. If it becomes possible to create voice messages, the administration could use them to clarify a situation in less than 5 minutes, instead of exchanging dozens of e-mails.
- Challenges and quizzes can be more fun than exams in **pinpointing a class's difficulties**. In addition, this type of functionality can also be used by the school to gain a **better understanding of students' knowledge** of a particular subject.
- On a much more general level, the introduction of this type of technology can demonstrate a school's desire to be more modern, **thereby enhancing its reputation and attracting talent** and new students.



However, two points need to be borne in mind:

- This type of tool seems more suited to schools than universities. The sheer number of students taking a course, and therefore requiring a teacher, makes it **difficult for the latter to respond to all the messages**.
- The introduction of this type of platform can meet with a great deal of opposition from both teachers and students. Instant messaging **complicates the separation between private and professional life**. What's more, the ability to send video and audio can **lead to a number of abuses**.



Pear Deck is an online presentation software that takes the features of PowerPoint or Google Slides and incorporates new functionalities to increase the number of interactions between learners and teachers.

Type

Slideshow presentation software.

Competitive advantage

The solution boosts learner engagement by increasing interaction and making courses more fun.

Price

Pear Deck offers a freemium business model, meaning that teachers can use the software free of charge, but to obtain full functionality, they have to pay USD 150 (CHF 134) per year. If the software is purchased for a school, the company can provide a quote.

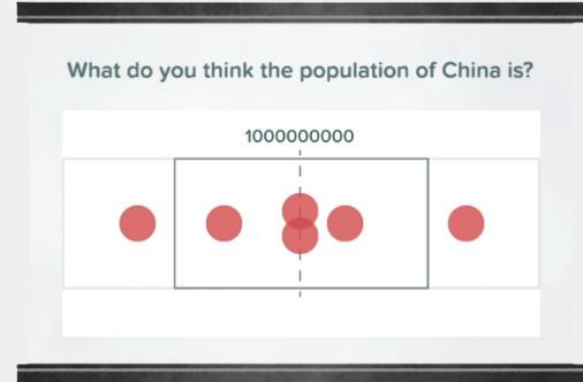
Number of users

According to [PR Newswire](#), the company works with over 100,000 teachers and has more than 2.5 million users.

Level of development

The company was founded in 2014 in Iowa City, USA, and [successfully raised](#) USD 500,000 in the same year. It has also won awards and competitions. In November 2020, it merged with GoGuardian, which is one of the largest Edtech companies on the market. According to its [LinkedIn](#), Pear Deck has between 11 and 50 employees. It is therefore at a very advanced stage of development.

Lien <https://www.peardeck.com/>



How does it work?

The teacher produces a presentation or lesson in slide format. Content creation is facilitated by pre-defined templates. Learners can then access the material to complete it or follow it interactively in class.



Features :

- **Numerous tools have been integrated** to facilitate use of the solution. Indeed, the Office suite, Teams, Mails, Google drive and other software can be incorporated. It can also be **integrated into the LMS** (Learning Management System) platform of various organizations.
- Pear Deck is **available via a simple web browser** and on all types of device.
- The solution **stores all elements on its cloud**, so they can be accessed from anywhere, and storage is unlimited.
- Numerous templates are available to **facilitate the creation of interactive content**. What's more, these are subject-specific.
- Students can answer questions directly on the slides during class. If the teacher so wishes, they can also complete homework assignments. The teacher can then **provide feedback and corrections**.
- Students' live answers are **presented anonymously**, so only the teacher can see which students have answered.
- It's **easy to incorporate audio or video into presentations**, and by extension into courses.



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



It can be difficult to get students involved in a course, which is why it's important to make it more interactive. Pear Deck proposes to make courses much more horizontal, so that they become almost like inverted classrooms, which has many benefits :

- The most interesting aspect of this solution is its ability to **make courses much more interactive**. Students answer the questions on the slides, and then the teacher provides the answers. In this way, **learners are much more stimulated** than with a simple lecture, which leads to greater class involvement.
- The use of pre-existing templates for specific subjects not only **saves time** when creating presentations/courses, but also **enhances teachers' creativity** by offering fully customizable visual aesthetics.
- The **integration of pre-existing tools** is one of Pear Deck's great strengths, whether for teachers, students or the school. This is also the case for integration into the LMSs of different organizations, which **increases the efficiency** of this solution. The integration into Canvas, widely used in the United States, is a perfect example.
- The answers given by the students are visible anonymously on the slides, but not to the teacher, who has all the information. **Social pressure is much reduced** for all students, especially those experiencing shyness. Teachers can **more easily identify students in difficulty**.

However, the solution has certain limitations :

- Unfortunately, Pear Deck **doesn't have its own videoconferencing system**, especially for a program that is used for online classes. To do this, you need to use software that is more or less well integrated. From various videos, it seems that Teams and Zoom are the most widely used.
- The early use of this type of tool raises two issues. On the one hand, it assumes that all students have suitable digital equipment, which can **reinforce existing inequalities**. On the other hand, it's bad for young students to use screens too regularly, which can lead to eye problems, but also **increase the likelihood of addiction**.



Screencastify is video screen and webcam recording software, with a range of features that make it easy for teachers and learners to create videos.

Type

Recording software.

Competitive advantage

The tool makes recording and creating videos much simpler. Interactive questions can also be integrated, as well as allowing students to record themselves.

Price

Screencastify offers a free subscription with a maximum of 10 videos, which cannot exceed 30 minutes. A USD 7 (CHF 6) subscription removes this time constraint, but storage is limited to 25 GB (compared with 10 GB for the free version), while the pro version is USD 10 (CHF 8.5) and increases storage to 100 GB. The version for an establishment is available on request.

Number of users

According to screencastify, more than 12.4 million users are registered in over 195 different countries.

Level of development

Screencastify was founded in 2013 in Chicago, USA. According to [RocketReach](#), it now has 89 employees.

How does it work?

The solution lets you log in with an account via a Google Chrome extension, after which you can record an application or the entire screen by adding your computer's camera and microphone. Once the video has been saved on a cloud, it can be easily edited.



Features :

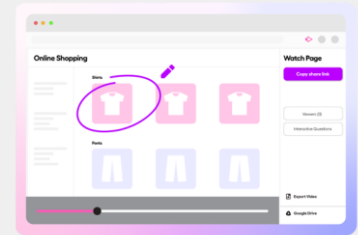
- The solution offers simple, **effective recording of an application or computer screen**. It also enables a microphone and camera to be recorded at the same time as the presentation.
- Screencastify **stores data and videos on a Cloud**, eliminating the need to store them on a computer.
- The solution makes recordings available on YouTube or on a Google Drive, **making them accessible to all**.
- It's possible to **find out who has or hasn't viewed the video**, as well as how many times each individual has watched it.
- **All you need is Chrome** to access the tool, so it's possible to use the software on a standard computer, a Mac or even certain tablets.
- Teachers can set up **interactive questions** in real time, and users can leave comments.
- **Videos can be requested from students** in a relatively simple way, with links where only teachers have access, so that they can complete an exercise or homework assignment. To do this, learners use the same software.
- A **"design" mode** is available when recording to make videos more visual and aesthetic.



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

Recording and editing video is a complex task, especially for those with little editing or computer skills. Screencastify attempts to overcome this problem by offering a simple and effective tool for teachers and learners alike to record themselves with ease.

- The solution makes it very easy to record a video of a screen or application, while incorporating a camera and voice sound. Taking the form of a Chrome extension, no special installation is required on the part of users. What's more, the **tool is highly intuitive, making it easy to use.**
- As in the case of recording, the editing part is considerably simplified, making it much faster. Students and, above all, teachers can now record and edit in a very short space of time, all on a single platform. What's more, the tool incorporates interactive questions to help identify students in difficulty. The use of videos within a course or **presentation adds dynamism and potentially increases learner engagement.**
- The ease with which videos can be published means they can be made available on a google drive or on YouTube. In this way, each student can **watch them on multiple media.** Screencastify **provides statistics** on who has already watched the video, and how many times it has been viewed per student. We can assume that a video that has been viewed several times per person is potentially not clear enough, or that the subject is complex. Providing comments also facilitates feedback.
- The ability to give students access to this tool is a strong asset. Indeed, this type of exercise is a welcome change from traditional homework and exams. It helps **develop "soft skills"** such as speaking, being synthetic and using new software (adaptability). What's more, a change of scene **can be an additional source of motivation for learners.**



Although this solution has the advantages listed above, it does have certain limitations :

- First of all, the **teacher must have high-quality equipment**, i.e. a camera with the right resolution and, if possible, an external microphone. Making recordings with poor-quality equipment greatly reduces the benefits of the tool, but the purchase of the equipment **represents a significant cost** for the teacher or school.
- As for teachers, homework or student assessments require at least one computer with at least one camera. Indeed, it's not possible to record with a smartphone. It would be a pity if the use of this solution were to **disadvantage learners who don't have all the necessary hardware.**



Civitas Learning is a platform that centralizes all school data for analysis and decision-making.

Type

Data aggregation and statistics production.

Competitive advantage

Retrieves all the data from a facility, enabling you to produce statistics and make more informed decisions.

Price

No relevant information was found. The cost of implementing the solution depends not only on functionality, but also on the number of students at the school.

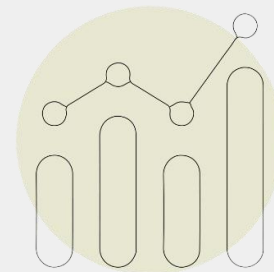
Number of users

According to the [Franciscopartners](#) website, the company is currently active in over 350 establishments. According to the [official website](#), more than 400 establishments use the platform, mostly in the United States.

Level of development

Civitas Learning was founded in 2011 in Austin, USA, and currently has over 140 employees, according to [Zooinfo](#). In 2015, the company successfully raised USD 60 million (CHF 54 million). Its level of development is one of the most advanced, particularly in the school data analysis market.

Lien <https://www.civitaslearning.com/>



How does it work?

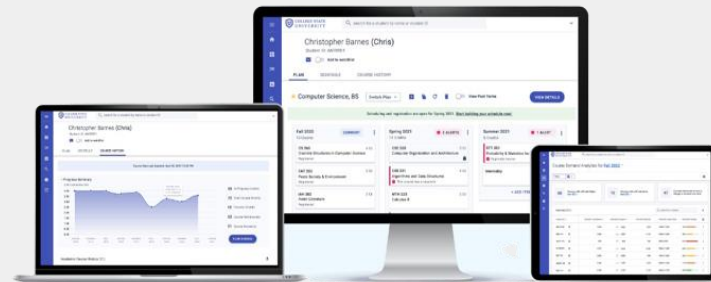
Initially, the platform collects all the school's information: grades, absences, attendance, subjects, success rates, etc. Then it provides various statistics that can be differentiated into three sections: grades, absences, attendance, subjects, success rates, etc. It then provides various statistics, which can be divided into 3 parts :

- The first focuses on students, specifically those who are dropping out.
- The second enables course planning.
- The last part analyzes the influence of various elements that can have an impact on students (new courses, projects, etc.).



Features :

- The platform **brings together all student and school data on a single platform**. With just one click, you can obtain all the information on a student.
- **Students at risk of dropping out can be identified** by means of a wide range of statistics. Even more impressive, the solution can estimate the probability of a student not graduating or leaving the school.
- Learners in difficulty are **highlighted on the platform** so that the right people can send them a message, set up an appointment with a counselor or arrange tutoring.
- Various functionalities enable teachers, administrators and counselors to **work together more effectively**.
- Civitas Learning analyzes data from courses and events held at the school. Analyses can then **identify the factors that decrease or increase student success rates**.
- The tool monitors enrolment data to **anticipate the hiring of future teachers**.
- The solution integrates a **planning mode** for students to facilitate the creation of their agendas, but also to monitor course fill rates and potentially **create new timetables** more in line with demand.



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



In most establishments, all data is not grouped together and is only available to some departments. What's more, this information is not analyzed, even though it represents an effective source for decision-making. Civitas Learning brings these different sources together to produce analyses on a range of issues, with a number of advantages :

- By analyzing large quantities of data, including grades and absences, the platform can **identify learners in difficulty** with different "scales". The software then **suggests various actions** to be taken, such as an appointment with an advisor, teacher or tutor, or simply sending a message of encouragement. With this method, **the number of students dropping out should decrease**, and consequently **increase the success rate**. This system can also be reassuring for learners' parents, who have an influence on the choice of schools.
- By analyzing events and courses over a period of time, we can see which elements have a positive or negative influence on student success. Furthermore, if a course has a large number of dropouts or poor results, **it seems wise to invest heavily in that subject**. The tool makes it possible to invest more strategically, based on data.
- The fact that all information is available on a single platform not only **saves time**, but also **enhances collaboration** between different sectors within a school organization. Teachers can observe not only the notifications submitted by the administrative section, but also the results obtained in the various subjects.
- Depending on the school and the curriculum, the number of options can be considerable. Students may find it difficult to draw up schedules, leaving less time for more qualitative tasks with the guidance counselor. Civitas Learning helps with all scheduling. In addition, it becomes **easier to arrange new hours** if the number of learners per class is too high, and in the opposite case, it is possible to reduce them.



Nevertheless, this solution has major limitations :

- To make this tool as efficient and effective as possible, **it needs a lot of data**. Few establishments have such detailed information, particularly for class monitoring, as lectures rarely count attendance. Should a school wish to implement this system and thus **increase the amount of data**, it may increase the workload for teachers and potentially reduce the time available for teaching.
- It seems clear that this type of tool represents a **danger to data protection**. In the event of a cyber-attack, hackers would possess a huge amount of information.
- Finally, the most critical point is the extensive use of data within a school. **Forecasts are rarely accurate** and are subject to numerous biases. For this reason, it should be used sparingly.