



MONTES ALTI
EDUCATIONAL FOUNDATION



EVOLUTION OF EDTECH BUSINESS MODELS

Prospective monitoring
September 2022
by Geneva Intelligence



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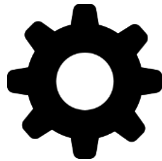
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Summary of the September 2022 edition



Definition of Edtechs



Methodology



Trends Analysis



Partager Apprendre is a platform that gives teachers the opportunity to share or sell documents with an educational purpose.



Kokoroe is an online platform that offers short courses with various formats to increase engagement.



Atom Learning is a learning tool that helps students revise and deepen their knowledge. In addition, it allows students to prepare for exams, but also to see their progress and points of improvement.



Pronote is a complete solution for managing school life. All the information relating to the student's experience within the school is centralised and digitised by the solution.



Padlet is an online application that allows the creation of collaborative virtual "bulletin boards" of images, text, sounds, web links and videos in the form of thumbnails.



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Definition of Edtechs:

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 the possibility of offering a complete 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](#)



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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 is to involve 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



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Edtech trend analysis



Main technological trends

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



Artificial intelligence



Learning analysis



Big Data



VR

Major developments

upGrad

has raised USD 210 million from investors.

Start up

bhanzu

Raises USD 15 million

to eradicate 'maths phobia' among students

twenix

Raises EUR 3.5 million to improve professional language skills

Tiger Global invests USD 50 million in Indonesian Edtech startup

ruang guru



Fortune Business Insight has published a research report, entitled "EdTech and Smart Classroom Market Forecast, 2022-2029"

According to the report, the global edtech and smart classrooms market share is expected to reach USD 319.65 billion by 2029, growing at a CAGR of 17.8% during the forecast period. According to the same report, the global market size was USD 88.82 billion in 2021.

Discover the analysis of Edtech trends



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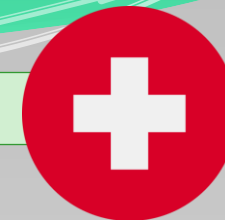
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Partager
Apprendre

Partager-Apprendre : A platform that values teachers' work



Share and Learn is a platform that gives teachers the opportunity to share or sell documents with an educational purpose.

Type

Platform for sharing paid or free documents.

Competitive advantage

An easy-to-use service to share and showcase teachers' work.

Price

Sharing-Learning is free but takes a 40% margin on the sales of paid documents. The remaining 60% goes to the author of the document.

Number of users

By July 2022, the platform had 950 registered users, almost 38,000 downloads and 823 document sales.

Level of development

The creation of Partager-Apprendre seems to date back to January 2020, but the start-up has been supported since June 2022 by the official business creation support body of the canton of Fribourg (FRUP). Moreover, the company has been offering its services since the beginning of 2022.

Link <https://partager-apprendre.ch/>



How does it work?

Share and Learn allows teachers to share documents in a very simple way. These are generally simple documents that can be printed. They can be free or paid depending on the creator's wishes. Afterwards, users can download the documents put online for free or pay for those that are monetised. You only need to be registered to have access to all documents on the platform.



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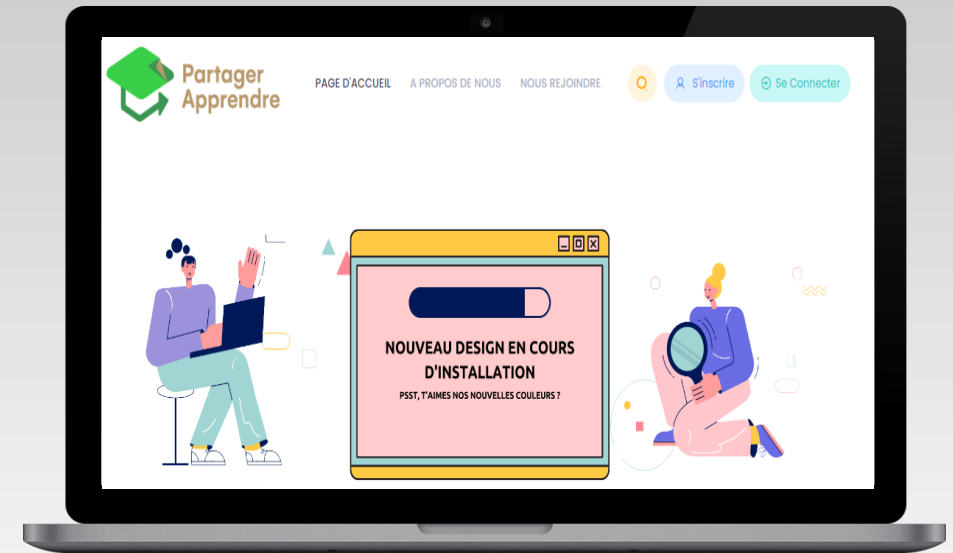
Partager Apprendre



Partager-Apprendre : A platform that values teachers' work

Advantages :

- Sharing-Learning allows teachers' work to be valued. Indeed, when a quality document is created, the teacher can share it with the members registered on the site.
- Monetisation of files again allows teachers' work to be valued. It is always gratifying to know that people are willing to pay for our work (if it is monetised). The added value is therefore twofold: the pupils are stimulated and the teachers' work is valued.
- The platform is very easy to use, so even teachers with little computer knowledge can benefit from this tool.
- The possibility to look at different free or paid creations stimulates the creativity of teachers or parents.
- The ease of obtaining multiple documents with just a few clicks saves time for teachers.
- The documents can be filtered according to educational level (class), branch (subject) and type of document.



Suitable for :

Kindergarten



Elementary School



High School



University



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Partager
Apprendre

Partager-Apprendre : A platform that values teachers' work

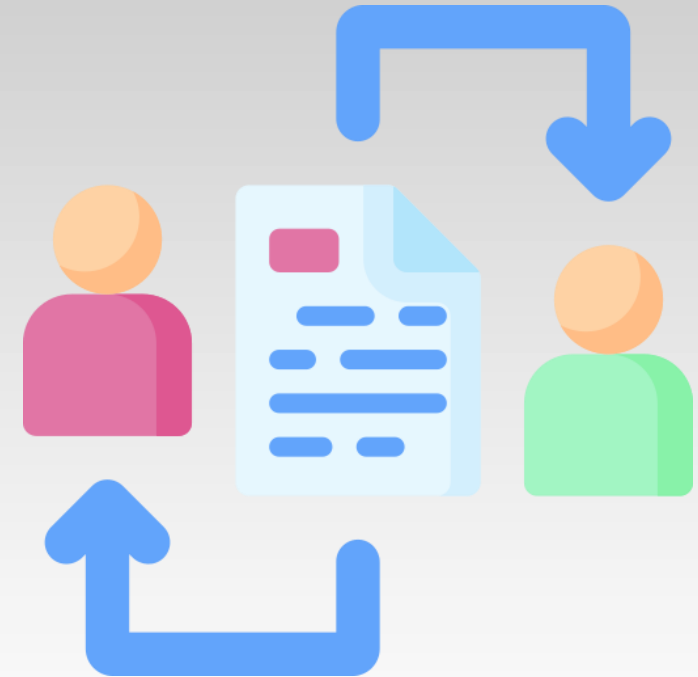


Many teachers produce high-quality materials and tools. It is a pity that the results aren't shared with the entire teaching staff. For this reason, Share and Learn has many benefits:

- The value of a high quality document produced by a teacher can be measured by the learning and enjoyment of the pupils, but also **by the number of times the document is uploaded to the platform**. This number of downloads can be an additional source of motivation. It can represent the number of people who helped.
- Document sharing **saves a lot of time** for the whole teaching staff so that documents are not duplicated. In addition, **this type of platform can highlight teachers or an institution with a high pedagogical quality**.
- The ease of use of the platform makes it possible to **include a larger number of people**, even those with a lack of computer knowledge. In this way, Sharing-Learning can **create a community spirit** that encourages teachers to produce increasingly creative and qualitative documents.

However, this platform could be improved on several points:

- For the moment the **maximum educational level proposed is middle school** whereas this idea could be applied for higher education levels.
- It is a pity that the platform does **not offer features for exchange between teachers**. Such tools would allow the transmission of good practice as well as documents.





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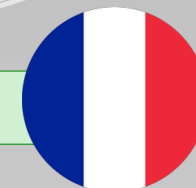
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SUIVANT



KOKOROE



Kokoroe : A training platform for the knowledge of tomorrow

Kokoroe is an online platform that offers small training courses in various formats for students or anyone who wants to increase their knowledge in a fun way.

Type

Platform offering fun training.

Competitive advantage

The training courses offered stimulate learners and the topics covered focus on the skills of tomorrow: creativity, diversity and inclusion, well-being at work, etc.

Price

Kokoroe has a freemium offer with 7 free courses, but a subscription of CHF 7.95 is required to access the whole catalogue (CHF 6.50 for a yearly subscription).

Number of users

According to the Kokoroe website, the platform has over 60,000 users.

Level of development

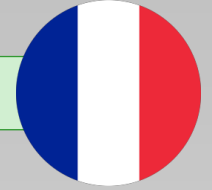
Founded in 2014 in Paris, Kokoroe grew up in the Microsoft Ventures accelerator. It is now a company with more than 10 employees. Many multinationals use their platform: Orange, Danone, La Poste, Vinci...

How does it work?

The platform offers different training courses that can be classified as either human, business or technological skills. A small number of them are free, and the platform offers a paid subscription for the others. The courses are quite short in order to optimise learning and different formats are used such as microlearning, expert videos and a quiz that awards a certificate.



Link <https://kokoroe.co/>



Kokoroe : A training platform for the knowledge of tomorrow

Advantages :

- The solution enables learners to better grasp complex concepts or ideas. Particularly on new topics or skills. The use of short videos based on microlearning and longer videos using experts allows for a better understanding.
- The use of short videos based on microlearning and longer videos featuring experts allows for better understanding.
- The use of a quiz and a certificate of achievement at the end of the course increases the learner's attention, but also verifies whether the knowledge has been acquired.
- The use of a quiz and a certificate of achievement at the end of the course helps to increase the learner's attention, but also to check whether the knowledge has been acquired.
- Kokoroe can be used on different media: computer, tablet, smartphone.
- Many webinars are offered by the platform. In addition, it is also possible to review replays of previous webinars.
- The training courses are generally offered in French and English.



Suitable for:

Kindergarten

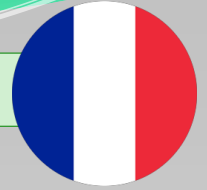
Elementary School ★

High School



University





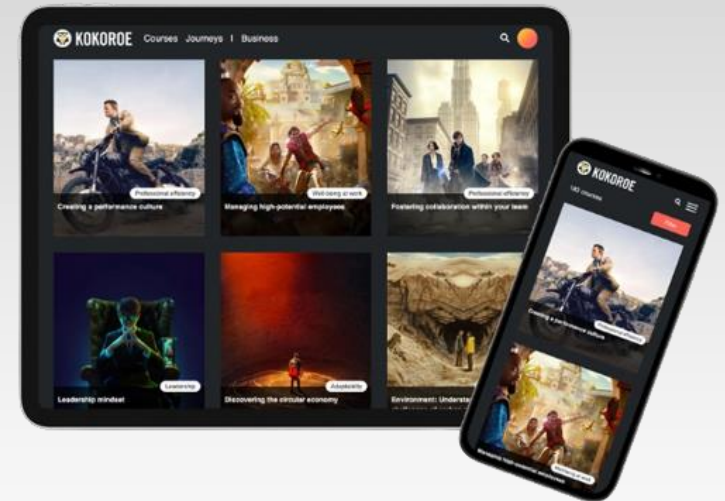
Kokoroe : A training platform for the knowledge of tomorrow

Kokoroe is a platform that offers rapid training to teach learners new skills. This type of tool can bring many advantages to education:

- The training offered by the programmes can have difficulty in adapting to new trends: artificial intelligence, big data... **Kokoroe allows teachers to introduce their students to topics that are not formally covered by the school curriculum. Moreover, the platform offers soft skills** that are highly valued in companies, such as creativity, collaboration, leadership... All these elements **allow schools to stand out** from the crowd.
- **The training format seems to be well adapted** to companies but also to students. A 20-minute training session can be inserted into a course and then discussed in the rest of the hour, which makes the course more stimulating and interactive.
- The quiz at the end of the courses and the certification **gives the students a goal**, which leads to a higher level of involvement. In addition, it allows teachers to know the level of understanding of the class.
- The webinars offered by the start-up allow for a more **in-depth course supplement** with experts in the field.

However, there are a few things to keep in mind:

- Firstly, the price of a subscription seems cheap for one person, but multiplied by the number of learners, **the cost can become high**. A simple solution would be to take a single subscription and transfer the videos to a large screen, but the value of the quiz and certificate is greatly diminished.
- If a teacher asks learners to watch the course at home in order to save time for direct classroom discussion, students who do not have the necessary material will feel excluded. Care must be taken not to **widen the digital divide**.





Atom Learning: A tool that combines revision and exam preparation

Atom Learning is a learning tool that helps students revise and deepen their knowledge. In addition, it allows students to prepare for exams, but also to see their progress and points of improvement.

Type

Learning platform for exam preparation.

Competitive advantage

An all-in-one tool to revise and prepare for competitive examinations.

Number of users

The website claims over 25,000 users.

Price

Atom Learning's offer is called "Atom Nucleus" and works on a subscription basis. The full package costs CHF 64.90 (monthly), the subscription without tests CHF 53.20 and the basic programme costs CHF 32. In addition, a free platform is offered for teachers with the Atom Prime package.

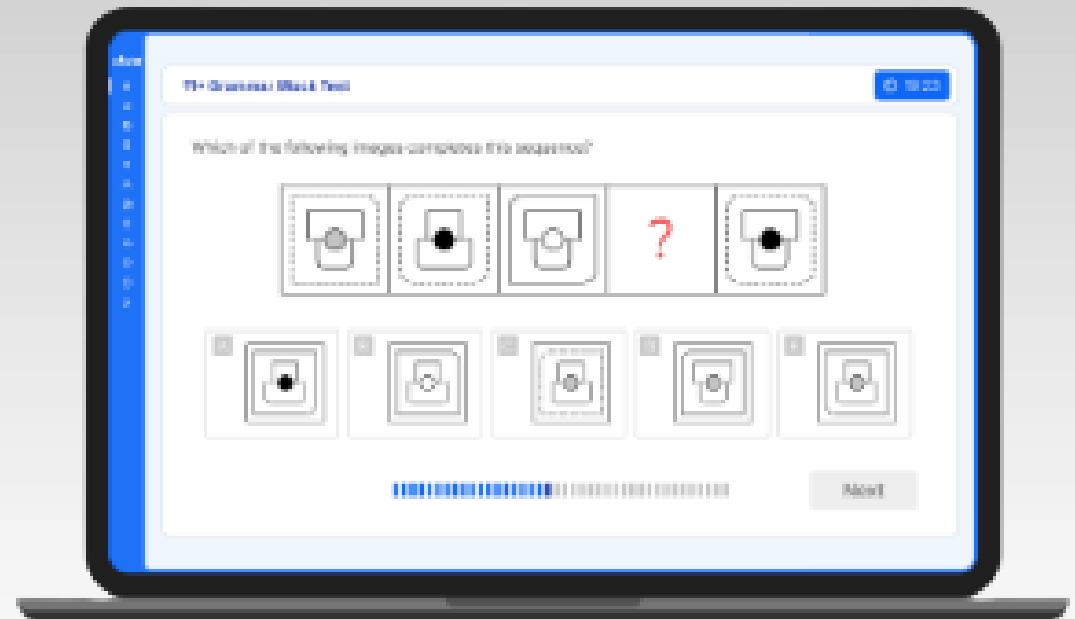
Level of development

Atom Learning is a UK-based start-up founded in 2018. In 2021 it raised USD 25 million, allowing it to grow rapidly. Today, the company is endorsed by over 1,000 (present in the UK).

How does it work?

The solution allows you to follow various training courses to acquire knowledge and then take online exams. Based on the results of the various tests, the tool analyses the data and suggests areas for improvement.

Link <https://atomlearning.co.uk/>





Atom Learning: A tool that combines revision and exam preparation

Advantages :

- Atom Learning makes it possible to prepare for, but above all to familiarise oneself with, the exams from an early age by means of a large amount of practice tests.
- The content is written by teachers to maximise assessment results. In addition, intelligent technology suggests areas for improvement by analysing the results of exercises and tests.
- One of the strengths of the tool is its ease of use. Indeed, Atom Learning has been designed to be highly interactive and intuitive so that it can be used without external assistance.
- Online courses are offered to enable the revision of notions seen in class. They can be held during the school holidays or after school.
- Support for parents is provided through various mechanisms: participation in webinars, advice from the community on a WhatsApp group, sessions with advisors.
- The company also offers a free platform called Atome Prime which is reserved for teachers. It allows teachers to create assignments and lessons in a simplified way, to obtain information based on class data and to adapt the content according to the class level.



Suitable for :

Kindergarten ★★★★★ Elementary School ★★★★★ High School ★★ University ★



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Atom Learning: A tool that combines revision and exam preparation

The platform offers several packages, with one paying for students who want to revise outside school hours (Atom Nucleus) and one free for teachers (Atom Prime).

Atom Nucleus offers a number of advantages:

- Taking and preparing for exams is always a particularly stressful time for learners. With this tool, students can begin to **deal with this type of exercise at an early age**.
- Atom Learning is produced by teachers and approved by numerous schools, which demonstrates its **great credibility**.
- The **accessible and pleasant handling allows** the youngest to use the tool without the supervision of parents or a teacher, allowing them to gain autonomy. Moreover, it is possible for parents and teachers to **check the evolution and progress at any time**.
- The presence of online courses is a real asset for learning. Indeed, it can be difficult to understand a concept with only one teacher and one method. By multiplying these and the type of support, it **becomes easier to understand different courses**. With Atom Learning, **teachers have several supports for their courses**.
- The introduction of **tools that support parents** is also highly appreciated. Webinars, the WhatsApp community and professional contact persons can be invaluable additions.

Despite its undeniable advantages, the platform has two shortcomings:

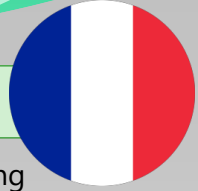
- The **price of the application is quite high**, with a subscription of CHF 64.90 per month, this represents a significant cost for a family.
- An **additional burden for the learner** can become difficult to manage if parents put a lot of pressure. In addition, this type of product puts a lot of emphasis on results and progress, which can **create additional stress**.

Atom Prime offers a number of benefits:

- The **product is free** if the "test" option is not subscribed to, which is quite remarkable considering the tool's user-friendliness and quality.
- A facility for creating and customising assignments and lessons, which are always in line with the curriculum, **freeing up teachers' time for more qualitative tasks**. In addition, all subjects are taken into account.
- Atom Prime directly integrates the data collected in class to provide analyses. This makes it possible to **identify strengths and areas for development**, but also to **visualise pupils who are experiencing difficulties**.
- The use of this type of tool makes it possible to **diversify the forms of learning and to stimulate the pupils**. In addition, exercises can be **adapted according to the needs** of each student, which maximises progress.

However, there are a number of points to be kept in mind:

- Although the free offer has many advantages, it loses some of its added value. This is because the **offer excludes the taking and preparation of exams**, which is regrettable.
- Students who have the paid version at home and who are **familiar with the tool have a strong advantage**.



Pronote : A solution to simplify your (school) life

Pronote is a complete solution for managing school life. Absences, late arrivals, homework, grades, report cards, detentions, canteen attendance, teaching aids... all the information relating to the student's experience at school is centralised and digitised in the solution and shared with those entitled to it. Pronote digitises the diary, the correspondence book and the school reports.

Type

School life management platform.

Competitive advantage

The main advantage of the solution is that it brings together in one device all the functionalities specific to the management of the school life of an institution.

Price

The rates are proportional to the size of the school and therefore to the number of students and teachers it has. Different formulas are proposed according to the number of teachers who use the tool. Prices range from EUR 544 for 30 teachers to EUR 1'000 for an unlimited number of teachers. Optional technical features can drastically increase the budget.

Number of users

The company claims to have equipped more than 10,000 schools. According to the company, 68% of French secondary schools use the solution.

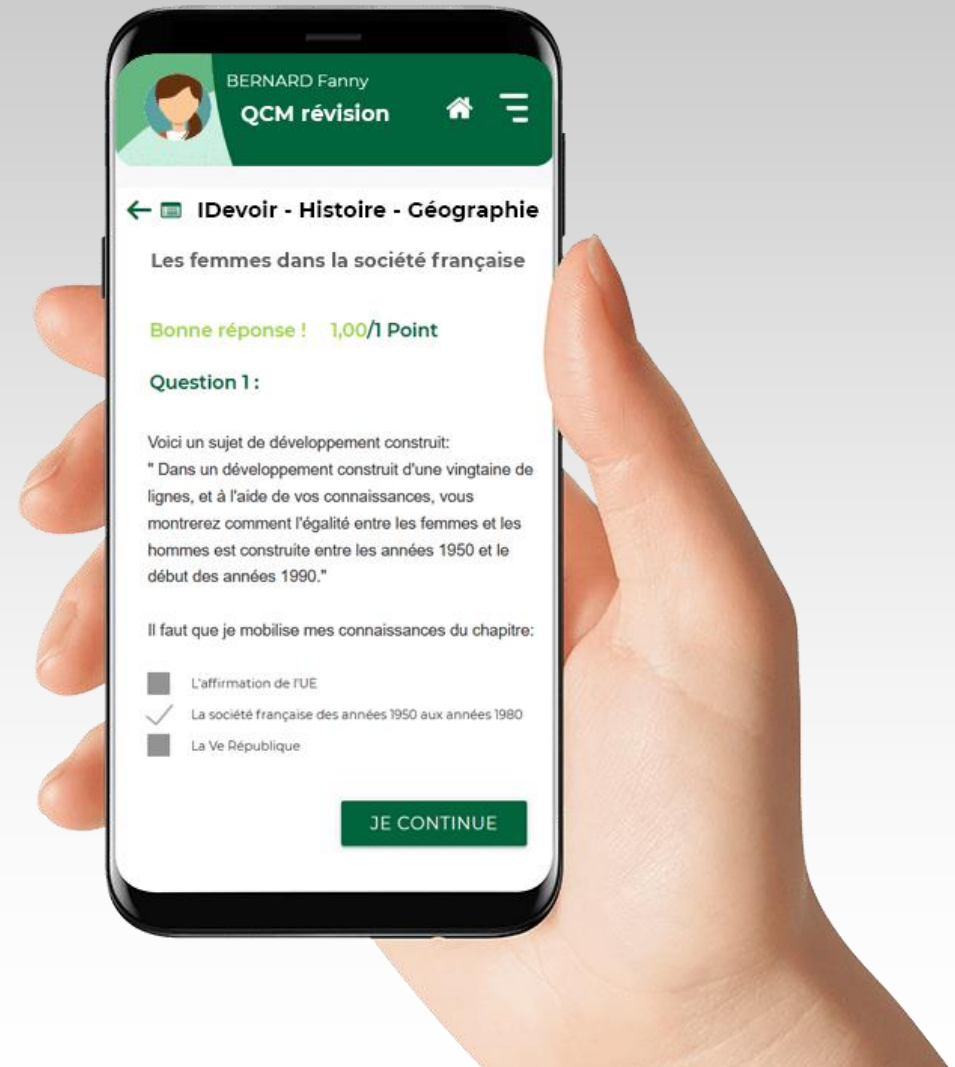
Level of development

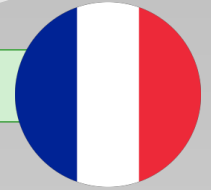
The company Index Education, provider of the Pronote solution, was founded in 1992. The first version of Pronote dates from 1999. In 2020, the company's turnover was EUR 21.5 million, to which Pronote contributed almost 30%.

How does it work?

The pronote solution is divided according to users. Several areas coexist (parents, teachers, school life, students, academy) and have their own functionalities.

Link <https://urlz.fr/jfUO>





Pronote : A solution to simplify your (school) life

Advantages

Concerning school life :

- Call sheets and monitoring of absences and lateness.
- Scheduling, management and communication of punishments.
- Development of a digital school file for each student.
- Identification of school dropouts (each school determines its own criteria for dropping out of school based on grades, lateness and absences, while defining specific alert thresholds).
- Management of the number of pupils present at the school canteen and publication of the menu.

Concerning pedagogy :

- Entry of grades, calculation of the average and positioning of each student for an exam.
- Automated and customisable edition of report cards.
- Digital textbook.
- Creation of MCQs.
- Sharing of digital resources.
- Trombinoscope of the class.

Regarding communication :

- Publication of timetables, room reservations, class councils, etc.
- Internal messaging between teachers or between teachers and students.
- Possibility to send SMS or emails from the solution.
- Notification of alerts on the phone and screens of teachers or administrative staff (intrusion, fires, etc.).
- Platform for managing educational content and resources.
- Centralization of work or interview requests.

Regarding the deployment of the solution :

- Accessible from a computer or a smartphone via the mobile application.
- Each functionality is subject to specific customisable authorisations and access.

Convient à :

Kindergarten



High School

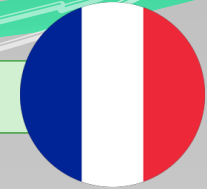


Elementary School



University





Pronote : A solution to simplify your (school) life

Pronote is a complete solution for managing school life. By centralising and digitising all information concerning the life of pupils within a school, the solution offers many advantages for schools and teachers:

- **This saves time for school managers and school life staff in carrying out their tasks.** As soon as a pupil is absent or late, the school life service is notified by the teacher in Pronote and a notification is automatically sent to the parents to inform them of the situation. Paper absence sheets no longer need to be collected for each class.
- **Better communication between the school, teachers and parents.** Via Pronote, parents have direct access to the information transmitted by the teachers and the school, thus avoiding any alteration or loss of information. Without a school life software, students are at the centre of the communication between teachers and their parents. Pronote ultimately excludes the student from the communication between parents and teachers. Grades, lateness and sanctions are communicated directly to parents via Pronote.
- **Better educational coherence and the fight against dropping out of school,** thereby promoting the attractiveness of a school. Teachers via Pronote have access to all the "statistics" of the pupils concerning their academic results and behaviour in class (absences, lateness, punishment, etc.). Thresholds of alerts that can be personalised by the school are defined on these criteria and alert the teachers when a potential dropout occurs, thus allowing them to rectify the situation as soon as possible.

Although the solution has significant advantages, it also has disadvantages:

- **An inadequate response to the challenge of the digital divide.** Not all teachers, school leaders, pupils and parents are equal in terms of having computer equipment and an Internet connection and the computer skills to use the solution. Those who are less comfortable with digital and IT tools will therefore be excluded from the school life of their pupils. Paper-based alternatives must therefore be maintained and offered should these cases arise.
- **An increase in administrative tasks for teachers.** Paradoxically, the solution was created to reduce administrative tasks and to allow teachers to concentrate on their core business of teaching. However, the traceability required by the solution means that teachers have to note down everything and integrate it into the solution. For example, teachers often have to describe in Pronote the content of the lesson they have given in a class, which did not exist before.
- **This instantaneous nature can be felt as pressure by teachers.** A school's use of Pronote can make immediacy the norm, which can be a source of additional stress for teachers. There is definite pressure from pupils and parents to put educational documents on Pronote very quickly. In addition, parents have direct access to teachers via email and can contact them whenever they wish.

BERNARD Fanny
Bulletin

Trimestre 2

ANGLAIS LV1	Cl. 10,62	10,00
ARTS PLASTIQUES	Cl. 10,11	10,00
ÉDUCATION PHYSIQUE ET SPORTIVE	Cl. 12,88	13,00
ESPAGNOL LV2	Cl. 11,35	10,00
FRANCAIS	Cl. 12,08	13,50
HISTOIRE-GÉOGRAPHIE	Cl. 11,43	11,00
MATHÉMATIQUES	Cl. 11,26	18,00
<i>Écrit</i>	Cl. 11,26	18,00
<i>Oral</i>		
MUSIQUE	Cl. 12,02	19,00
PHYSIQUE-CHIMIE	Cl. 11,54	11,83
SCIENCES DE LA VIE ET DE LA TERRE	Cl. 11,65	11,50
TECHNOLOGIE	Cl. 11,99	15,50
VIE DE CLASSE		
EPI		



Padlet: creativity for more interaction

Padlet is a productivity tool as well as a collaborative platform that allows you to create a board and incorporate many elements into it, so creativity is at the heart of this process. In addition, it is possible to significantly increase interaction within a classroom.

Type

Collaborative platform that also allows for increased productivity.

Competitive advantage

The tool makes it possible to put documents online in a secure manner but also to make teaching more horizontal, with greater interactivity between the teacher and the pupils.

Level of development

Padlet is a start-up founded in 2012 in the United States that currently has 36 employees. The company seems mature for a start-up.

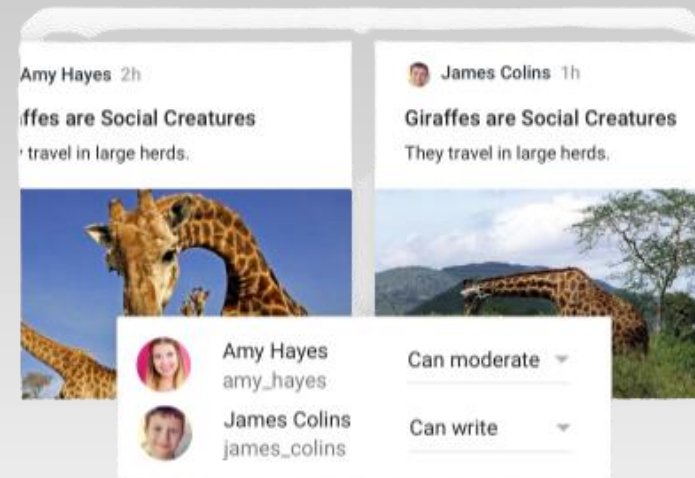
Number of users

No relevant information was found on this subject. However, taking into account its level of development and the number of followers on social networks (78,000 on Twitter), we assume that the company reaches a large customer base.

Price

The price varies according to the number of teachers. For example, an annual subscription for an institution with 1-10 teachers costs USD 1000 per year.

Link <https://padlet.com/>



How does it work?

A padlet represents an interactive board, it is possible to create sections, sentences or post content directly on the board. The tool becomes interesting if several users are invited, they can modify the content of the board according to the settings set by the creator. In this way, students can ask questions in writing, upload documents, understand the course flow...



Padlet: creativity for more interaction

Advantages

- The platform stimulates teachers' creativity with the various customisation tools. Indeed, teachers can visually arrange their ideas and documents to increase their productivity.
- The possible interactivity between students within a class, but also with the teacher, allows the creation of a small community and limits the number of vertical-only interactions..
- This type of medium allows for the establishment of thought patterns, many people are able to understand concepts better when it is explained in a visual way. Padlet is perfectly suited for this type of learning.
- The Padlet administrator can choose whether users can edit the documents presented. In addition, It is also possible to define who can access the Padlet.
- The platform is multi-media and can be used on a computer, tablet or smartphone.
- Padlet also allows for greater collaboration between teachers in order to centralise documents on a single platform.



Suitable for :

Kindergarten ★

Elementary School ★★

High School ★★★★★

University ★★★



Padlet: creativity for more interaction

The education system is often criticised for being too vertical and lacking interaction. Padlet offers many features to compensate for this problem :

- Numerous functions allow the board to be personalised, thus encouraging creativity. This stimulation increases the motivation of both teachers and students. Indeed, a change of medium can be a real advantage for learning different concepts. This is especially true if learners are allowed to modify the different documents posted online.
- The implementation of this type of tool makes the exchange between the teacher and the students much more interactive. If the teacher puts a document online, the students can ask questions directly on it and then the teacher can answer with a simple sentence or a document that completes the answer.
- Everyone has different ways of learning, some are more visual than others. Padlet allows to emphasize the graphic side but also to **highlight a certain mental scheme in the curriculum.**
- Changing the different permission and user statuses of the board allows better control of the board. A teacher can decide to limit interaction with students so that they cannot modify the documents posted online, and then, if he or she wishes, the teacher can change strategy and make the board more interactive.
- A tool such as Padlet also allows for **increased collaboration between teachers**, which makes it possible to **obtain a multidisciplinary vision** that may be lacking in some programmes. Indeed, having an interactive board with two teachers who can collaborate simultaneously can be very interesting.



However, this solution has certain limitations:

- Once access is granted to students, they can edit, delete and publish whatever they like. If learners start deleting intentionally then the functions have to **be restricted which penalises the whole student body.**
- In order to use this tool, you need at **least a smartphone and an internet connection.** Even if the majority of learners now have these two requirements, **this is not the case for everyone.**
- This tool is designed to be used in class but can easily be used outside of work hours. This can lead to a **disruption of the work-life balance for both the learners and the teacher.**