Digitalize Independent Schools: Trends, Challenges and Solutions

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Who we are

✔ **School & Learning Management SaaS**

✔ **600+ Educational Institutions @ 35 Countries**

✔ **~500K Active Users**

✔ **Microsoft Partner – Education Specialist**

✔ **HQ in Kavala, Greece**

✔ **30 Employees**

✔ **Venture Backed**

Microsoft Partner | Education Specialist | Microsoft Azure
Microsoft

Trends: Technology & Education

2022

1970

1970

2022

1990

2022

1970

2022

...but this is about to change

School & Classroom structures are now disrupted by technology

1970s

2022

Students are technology addicted

Class Management is highly demanding
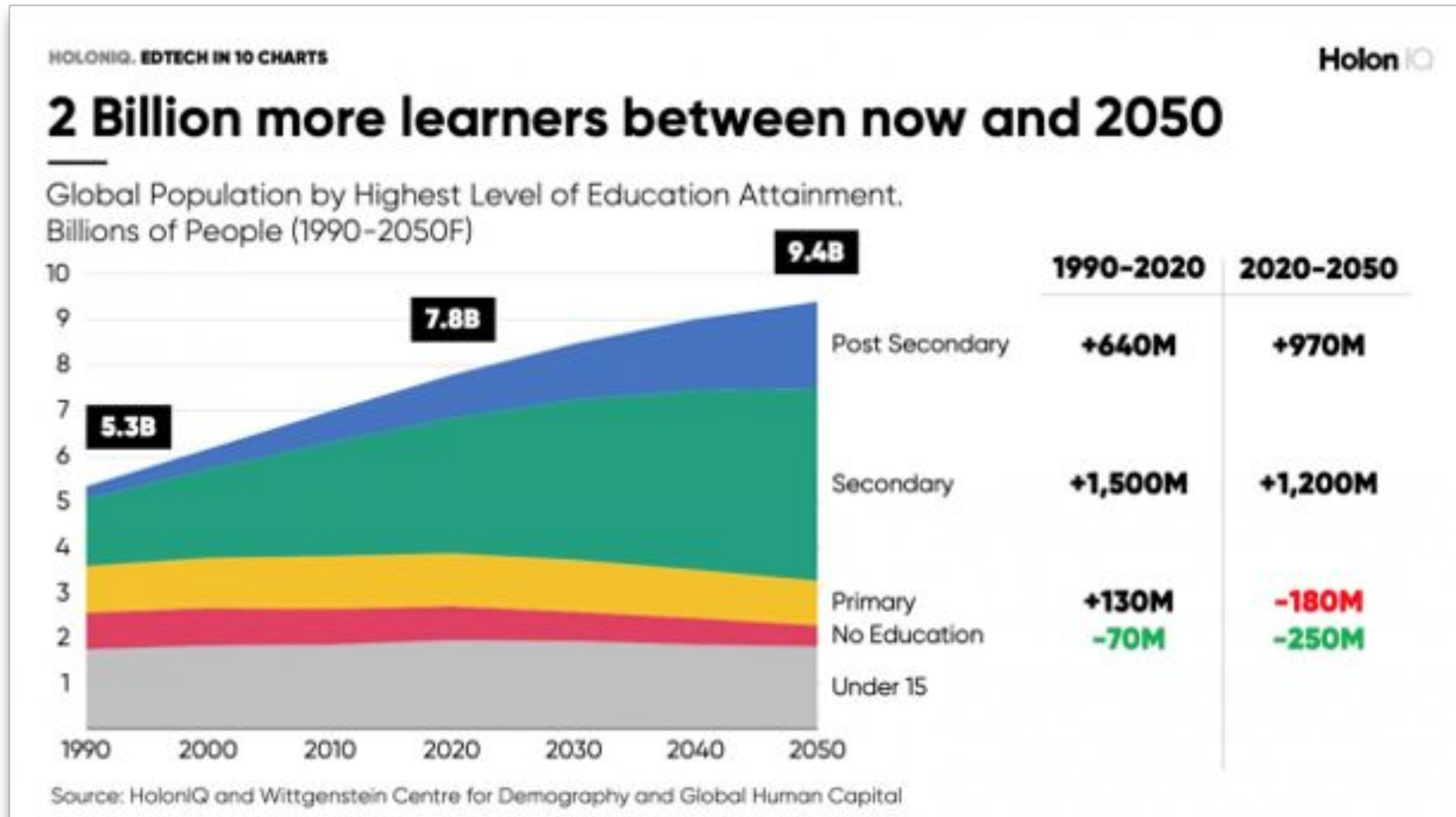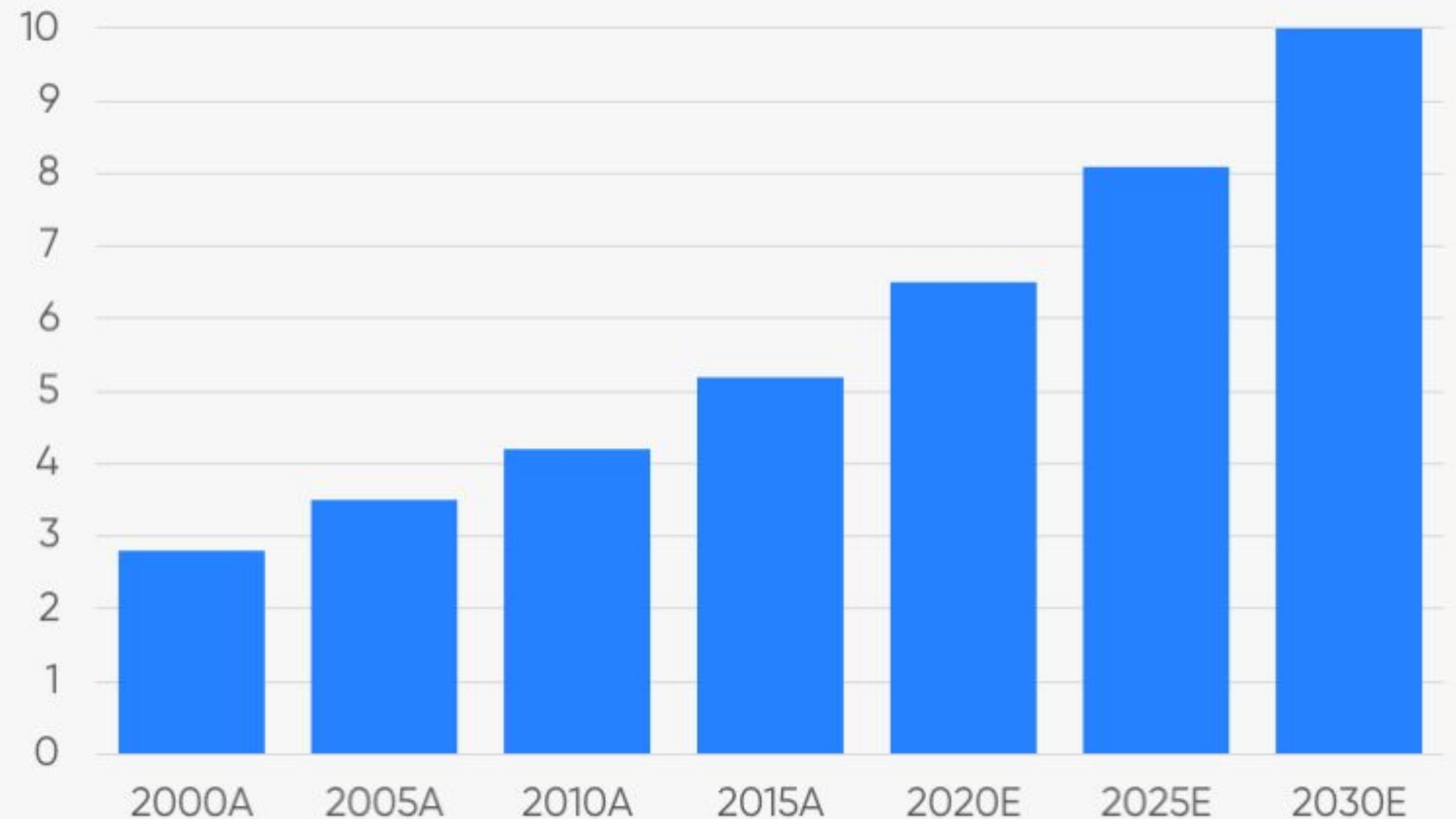
Trends: Education numbers

Growing Student Population

Education will grow to a $10 Trillion industry in 2030.

✔ Growth Rate: 4.5%
✔ over 6% of Gross
World Product (GDP)

Global Education and Training Expenditure (Trillion USD)

Source: HolonIQ and various underlying estimates from Goldman Sachs, GSV, IBIS Capital, Citi
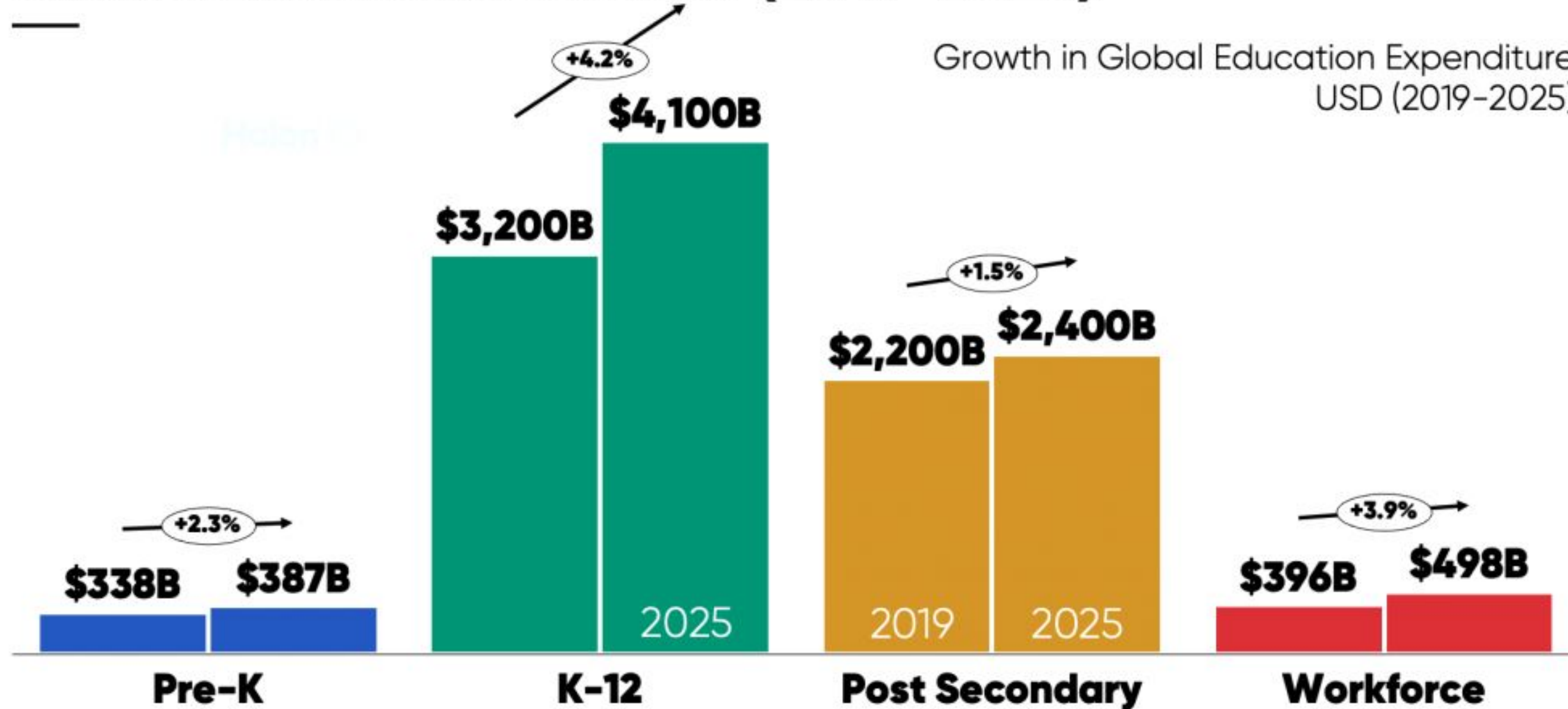
K12 Education grows fast

HOLONIQ. **GLOBAL EDUCATION TECHNOLOGY**

Holon IQ

Global Education Growth (2019-2025)

Growth in Global Education Expenditure
USD (2019-2025)

+4.2%

$4,100B

$3,200B

+1.5%

$2,200B $2,400B

+2.3%

$338B $387B

+3.9%

$396B $498B

2025

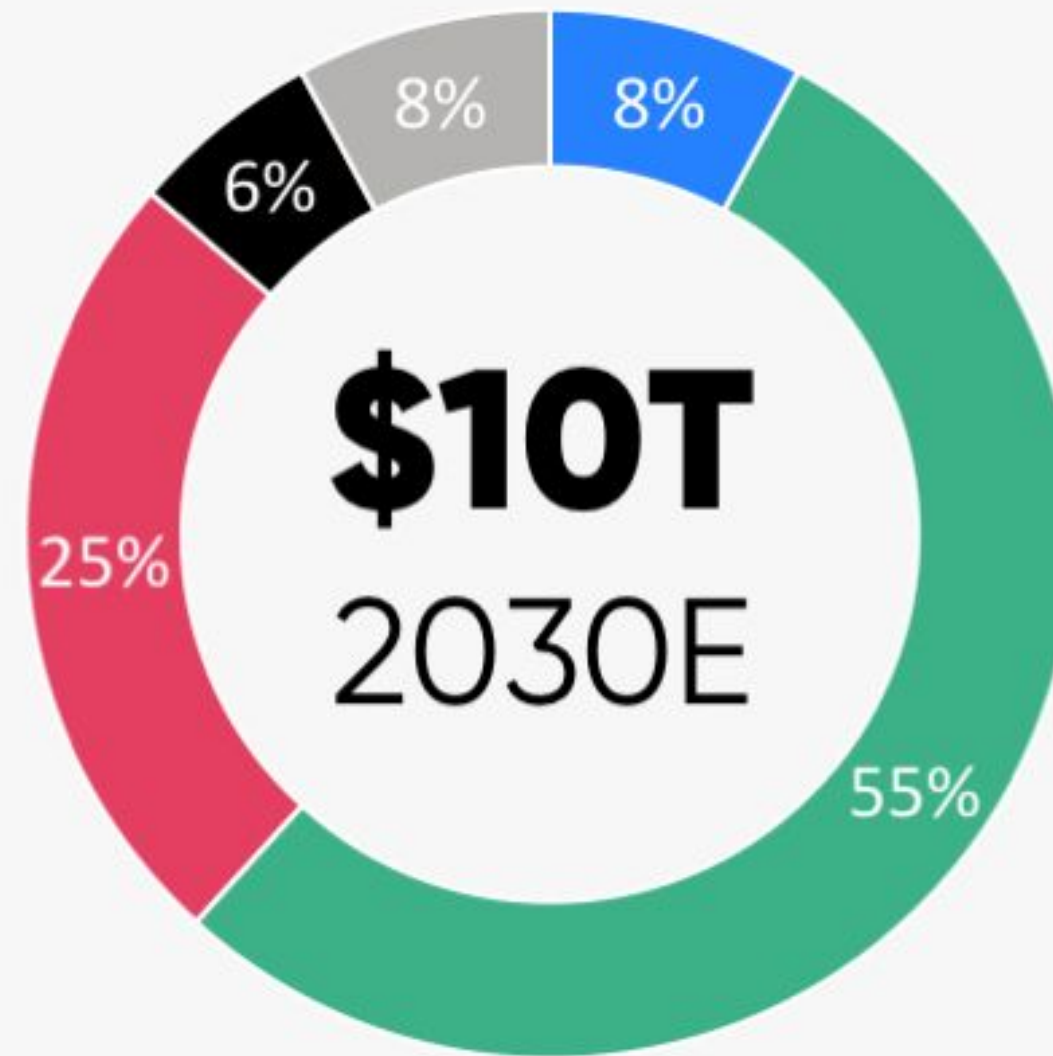2019 2025

Pre-K

K-12

Post Secondary

Workforce

Source: HolonIQ, February 2021

www.holoniq.com

K12 Education rapid growth to over 5T USD by 2030

2030E Global Education and Training Expenditure (Trillion USD)

$10T
2030E

- 8% (Pre K)
- 55% (K-12)
- 25% (Post Secondary)
- 6% (Corporate)
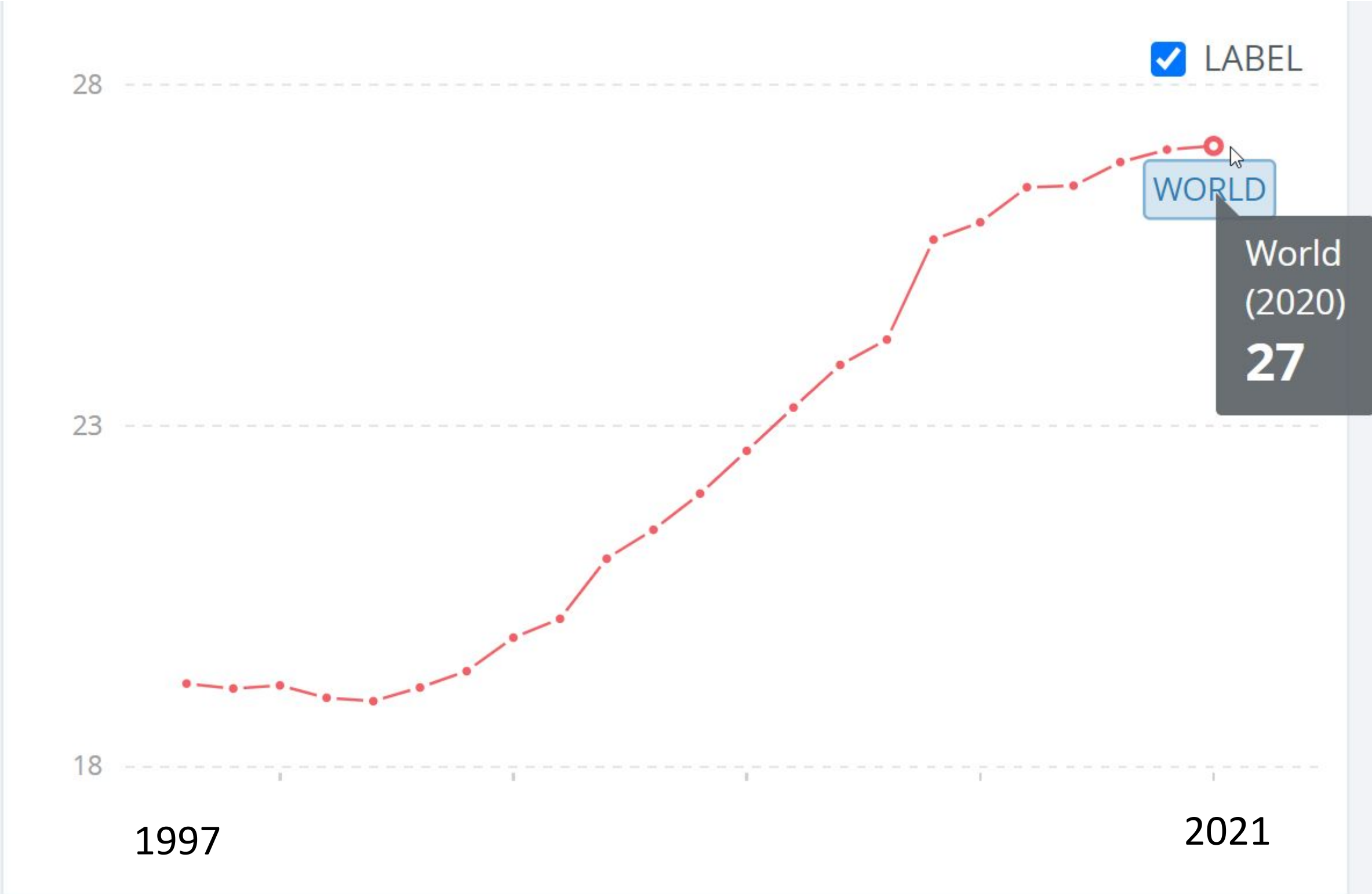- 8% (Lifelong Learning)

■ Pre K ■ K-12 ■ Post Secondary ■ Corporate ■ Lifelong Learning

Source: HolonIQ and various underlying estimates from Goldman Sachs, GSV, IBIS Capital, Citi

Private over 25% of the total K12 Market

Source : World bank

28

23

18

☑ LABEL

WORLD

World (2020)
27

1997

2021

Trends: Investment in EdTech

Education is still not digitalized enough

HOLONIQ. EDTECH IN 10 CHARTS

Holon IQ

Less than 4% Digital Spend in Education & Training

Global Digital Spend in Education as a proportion of
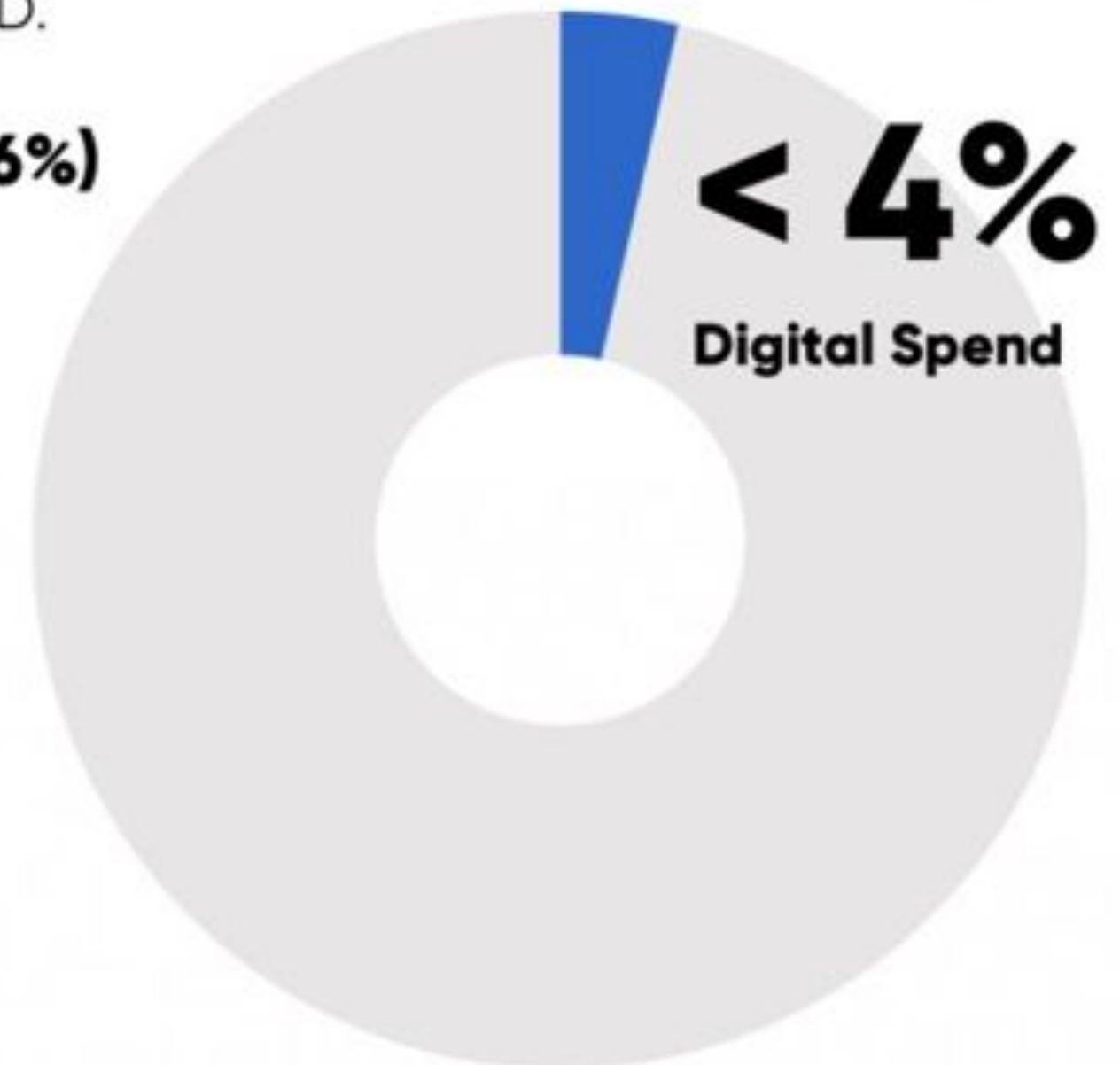Total Global Education and Training Expenditure in USD.

$227B Education Technology Spend (3.6%)

Hardware, Software and
Technology Enabled Services

$6.2T Non-Digital Spend (96.4%)

Labor, Physical Equipment,
Analogue Content, Real Estate &
Building Works, Utilities etc

< 4%
Digital Spend

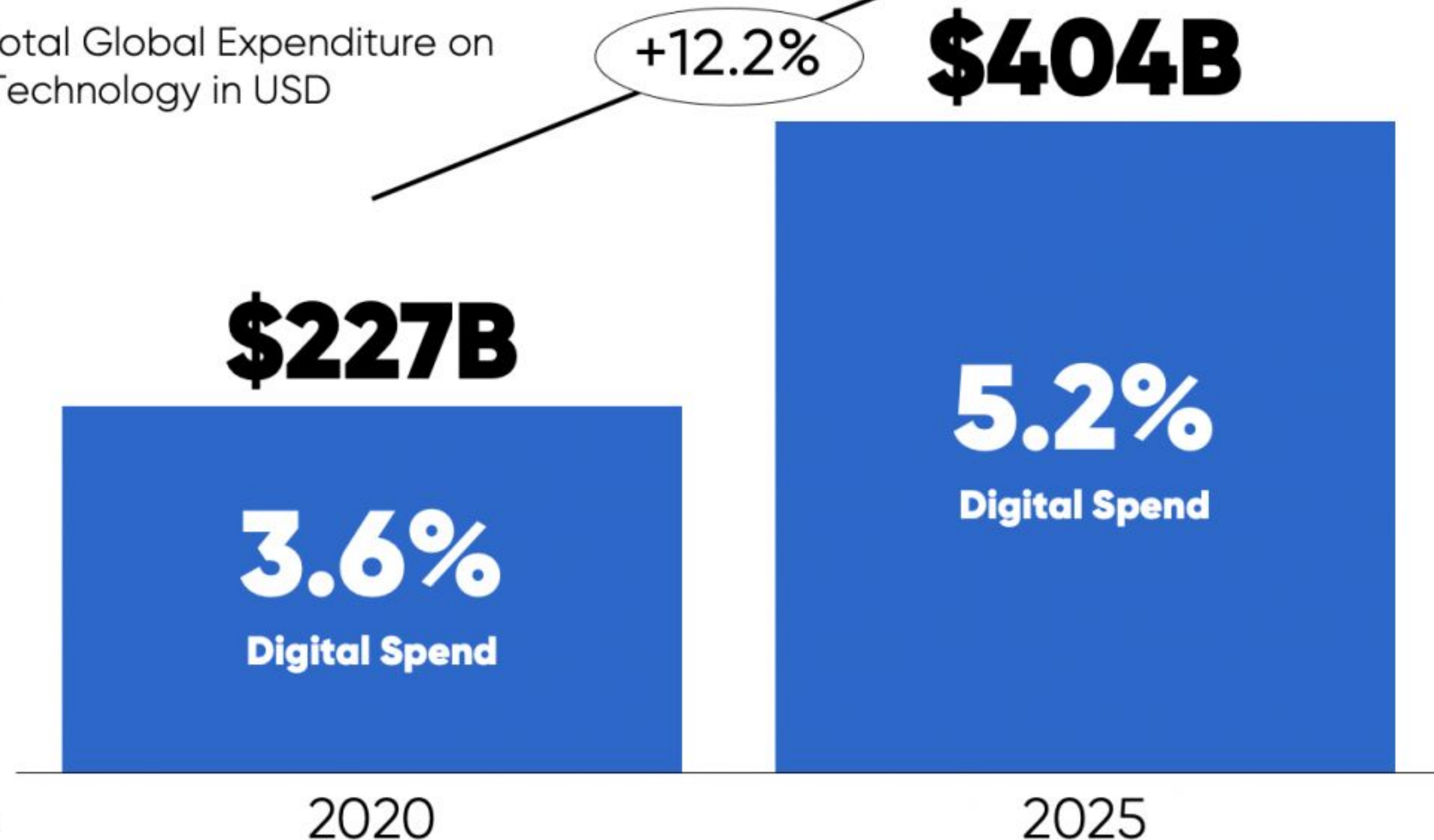Source: HolonIQ, January 2021

Investment on Digitalization still small but it grows

HOLONIQ. EDTECH IN 10 CHARTS

Holon IQ

EdTech spend will nearly double in the next 5 years

Growth in Total Global Expenditure on Education Technology in USD

+12.2%

$404B

$227B

3.6%
Digital Spend

5.2%
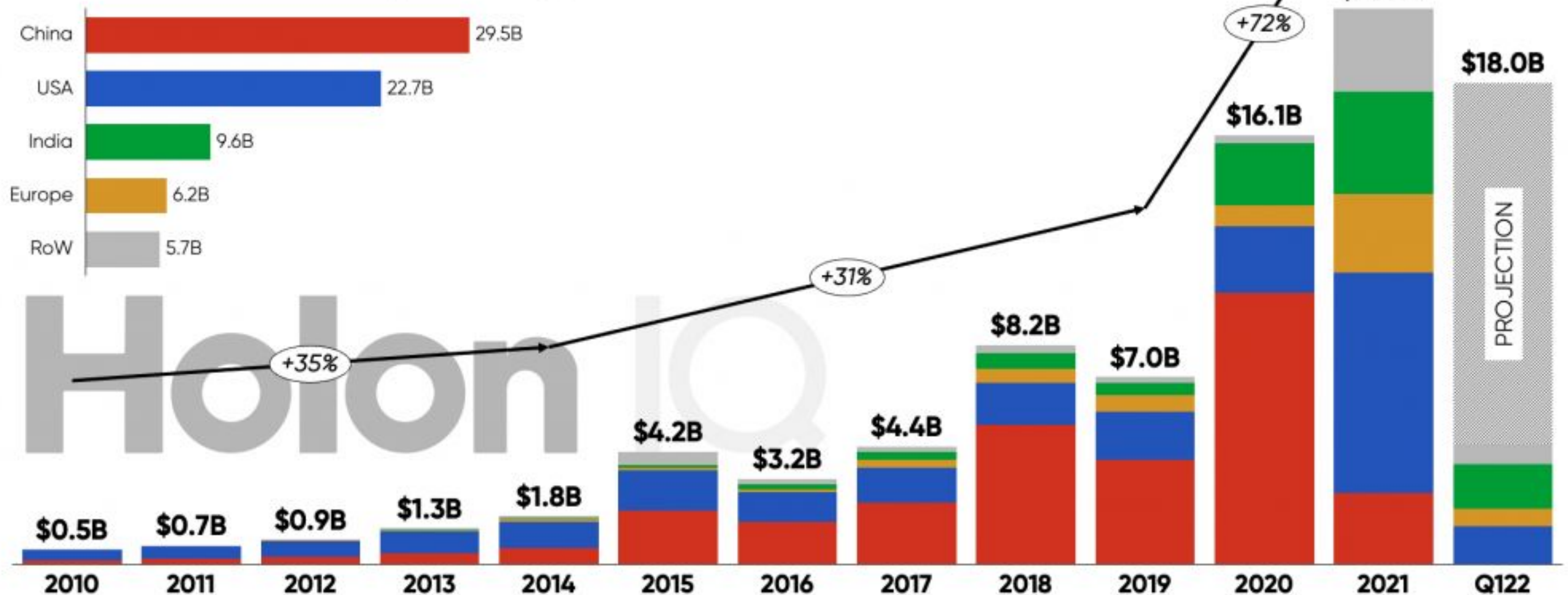Digital Spend

2020

2025

Source: HolonIQ

Investment on EdTech grows fast!

HOLONIQ. GLOBAL IMPACT INTELLIGENCE

Holon IQ

$4.5B of EdTech Venture Funding for Q1 2022 (1 Jan-30 March): 'Straight line' momentum would deliver around $18B for the full year.

Global Education Venture Capital Funding, 2010-Q1 2022 in USD Billions

China — 29.5B
USA — 22.7B
India — 9.6B
Europe — 6.2B
RoW — 5.7B

2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	Q122
$0.5B	$0.7B	$0.9B	$1.3B	$1.8B	$4.2B	$3.2B	$4.4B	$8.2B	$7.0B	$16.1B	$20.8B	$18.0B

+35% +31% +72%

PROJECTION

Source: HolonIQ, 1 April 2022. All numbers rounded and may not sum exactly due to rounding. Excludes PE transactions. All years calculated at historic FX.
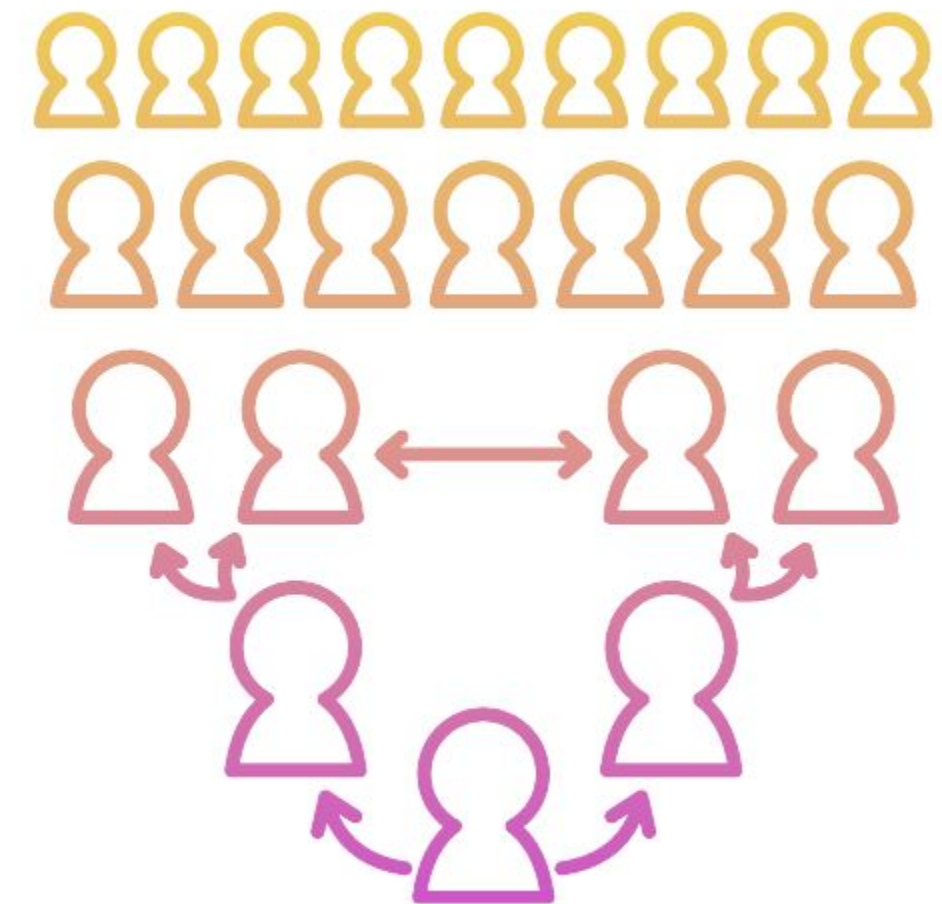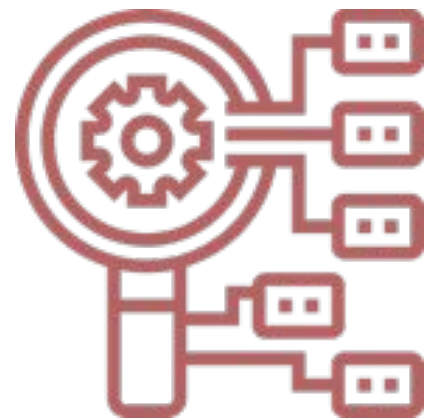
www.holoniq.com

Challenges

Managing a school = Managing a small city

- ✔ **Information Flow & Communication**
- ✔ **Attendance, Security & Access**
- ✔ **Admission & Registration**
- ✔ **Medical & SEN**
- ✔ **Timetabling, Scheduling & Meetings**
- ✔ **Content , Media & Teaching Facilitation**
- ✔ **Behavior – Performance – Results**
- ✔ **Teacher & Students, Parents Data Management**
- ✔ **Payments, Billing & Accounting**
- ✔ **Infrastructure & Service Management**

Top 3 ICT Challenges for Schools

**Complex
Operational Process**

**Lack of IT Personnel
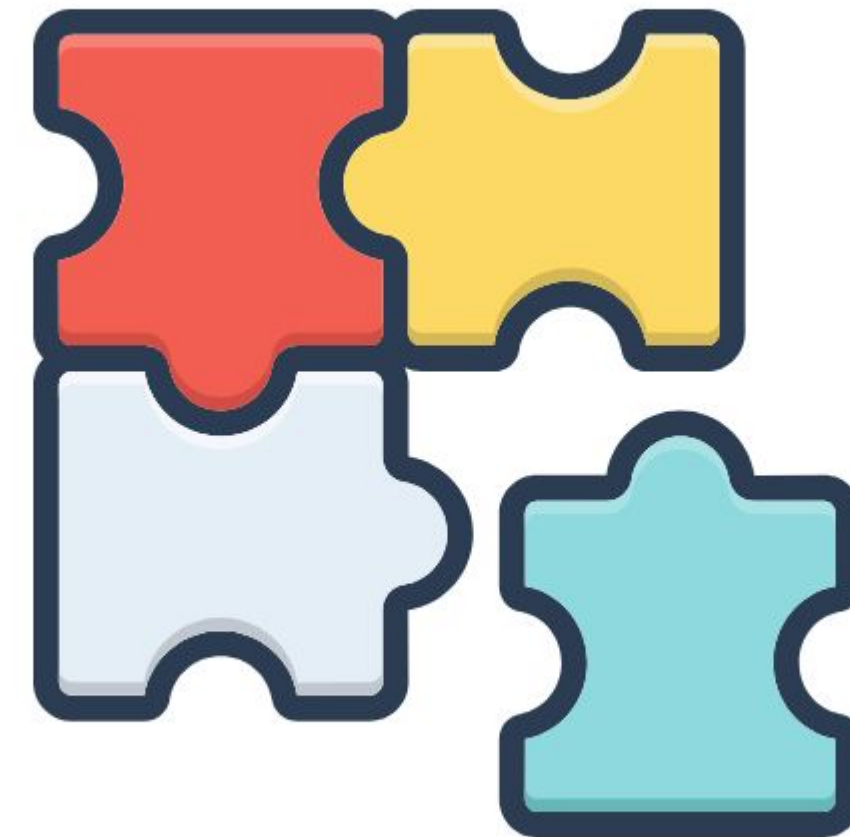& Budget**

**Too Many Systems / DBs
Islands of technology**

K12 Education – Complexity Increases for ICT

- ✔ **Hybrid Learning (Classroom-Online) in the post-COVID era**
- ✔ **Higher engagement of parents** (aka Viber moms!)
- ✔ **Parents - All processes to go online**
- ✔ **Manage & Monitor communication overload**
- ✔ **Teachers overloaded by technology & processes**
- ✔ **Complex & personalized curricula (i.e. STEM)**
- ✔ **Outcome Based & Other complex assessment approaches**
- ✔ **Students are technology savvy**
- ✔ **Social issues: bullying, inclusion, public health, data protection etc.**

Curriculum Management

- **Personalized Curricula**

- **International Baccalaureate**

- **Dual Curricula**

- **STEM**

- **Extracurricular Activities**

Financial Management – Online Payments

- **Cash flow issues due to COVID and Energy Crisis**

- **Communication with parents**

- **Switch to online payments – Payment Gateways**

- **New forms of payment (e-wallets, Apple Pay, Google Pay)**

- **Automation – Recurring payments**

- **Tax Compliance (i.e. MyData)**

Multiple Integrations
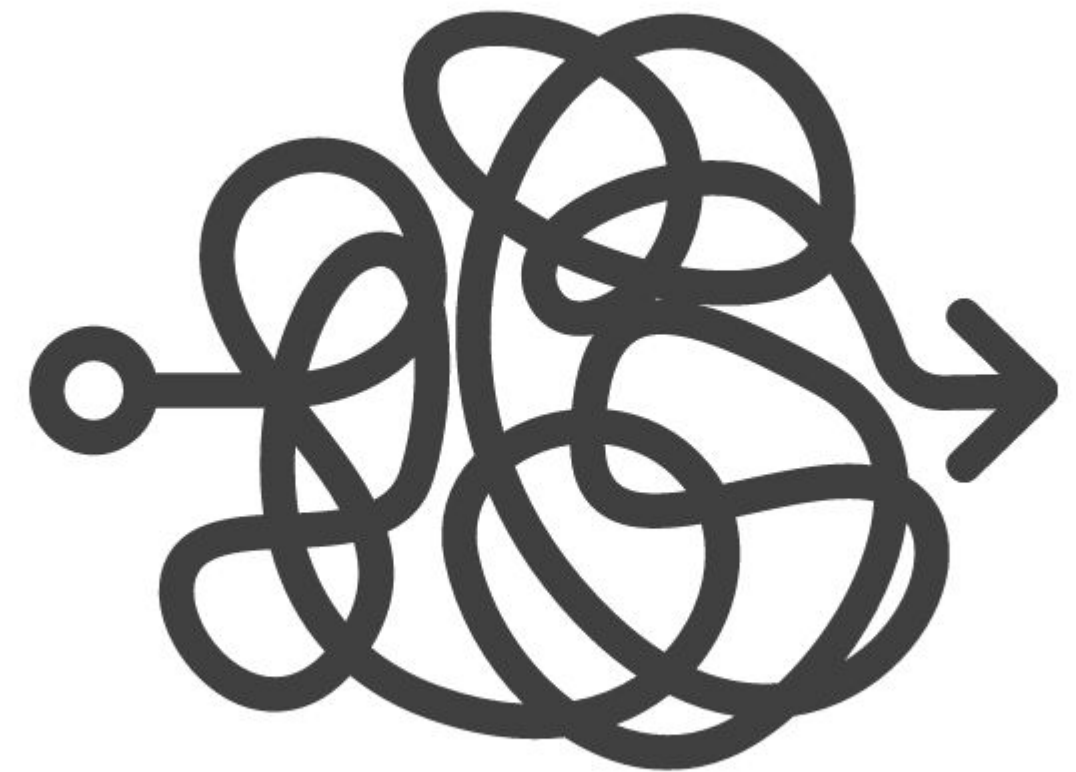
- **ALL schools need integration with O365 or G Suite**

- **Distance Learning**

- **Asynchronous Learning**

- **Content – Antiplagiarism etc.**

- **Device Management**

Fragmented IT Landscape

- **Islands of information vs. end-to-end**

- **On premise vs. Cloud-based**

- **Different systems that don't sync**

- **Inefficient data management**

- **Inefficient use or resources**

Solutions

Do we need more EdTech solutions?

www.globallearninglandscape.org

2021 Global Learning Landscape

Holon IQ

| KNOWLEDGE AND CONTENT | EDUCATION MANAGEMENT | TRADITIONAL MODELS | NEW MODELS | EXPERIENCING LEARNING | INTERNATIONAL EDUCATION | LEARNING SUPPORT | ASSESSMENT & VERIFICATION | WORKFORCE AND TALENT | SKILLS AND JOBS |

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www.globallearninglandscape.org

Elements of a good school ICT solution

✔ **Lowers Operational Cost (i.e. salaries and admin overhead)**

✔ **Provides a Holistic (end to end) approach**

✔ **Perceived as a user friendly by all users**

✔ **Flexible to meet ever changing requirements**

✔ **Adaptable to meet your school needs**

✔ **Well integrated with multiple existing platforms**

✔ **Serves all user types** (students, teachers, parents, candidates, graduates , employees, administrators)

✔ **Well Supported**

What exists for School Management

✔ **SIS – SMS**

✔ **ERP**

✔ **CRM**

✔ **LMS**

✔ **Custom Solution**

✔ **Excel and manual alternatives**

✔ **Combination of all above**

A few words about Classter

Classter All-in-One School Management System

We offer an:
    End-to-End SaaS Cloud solution
    for **the whole school eco system**
    at minimum possible cost and set up time

This is an **All-in-One platform**:
- ✔ Adaptive Learning solution (LMS)
- ✔ School Management system (SMS)
- ✔ Student Information Management System (SIS)
- ✔ School Communication Gateway
- ✔ School CRM & School ERP

Classter

Modules

Edu CRM

Appointments

Messaging

Parents Meetings

Learning Mgmt.

Academic Mgmt.

Timetable Mgmt.

Books & Library

Quizzes & Surveys

Admission & Sales

Online Payments

Student's Billing

Accounting Integration

Bus Mgmt.

Classter

Awards and Customers Recognition