The State of Educational Publishing

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Microsoft UK Education Partnership Community

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"Chad, when I told you to deliver a paper on outmoded technologies, I didn't mean for you to throw a New York Times on my lawn."

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After Einstein

A wise man said that "Content without Technology is lame; Technology without Content is Blind."

(Timo Hannay, Digital Science)

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No one imagines, Everyone expects…

- Storage will never run out – the Cloud
- Access devices will adapt to mobility
- All functionality will always be in place
- Common needs will be resolved into Apps
- Workflows like learning will induce greater productivity, better decision-making, measurable compliance

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Digital Education Restated

- Atomization of content
- Commoditization of content
- Premium value lies in the software that associates content to produce learning solutions
- Customized, personalized, self-assessed, auditable
- Who owns the hopper, who owns the tools?

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The Nature of Change

- Most of the factors that will have an influence on how we develop are already present
- Most of the technologies that we shall use in the next 15 years are either known or predictable
- Next generation attitudes will not map to current attitudes, leading to sharp confrontations between expectations and actuality

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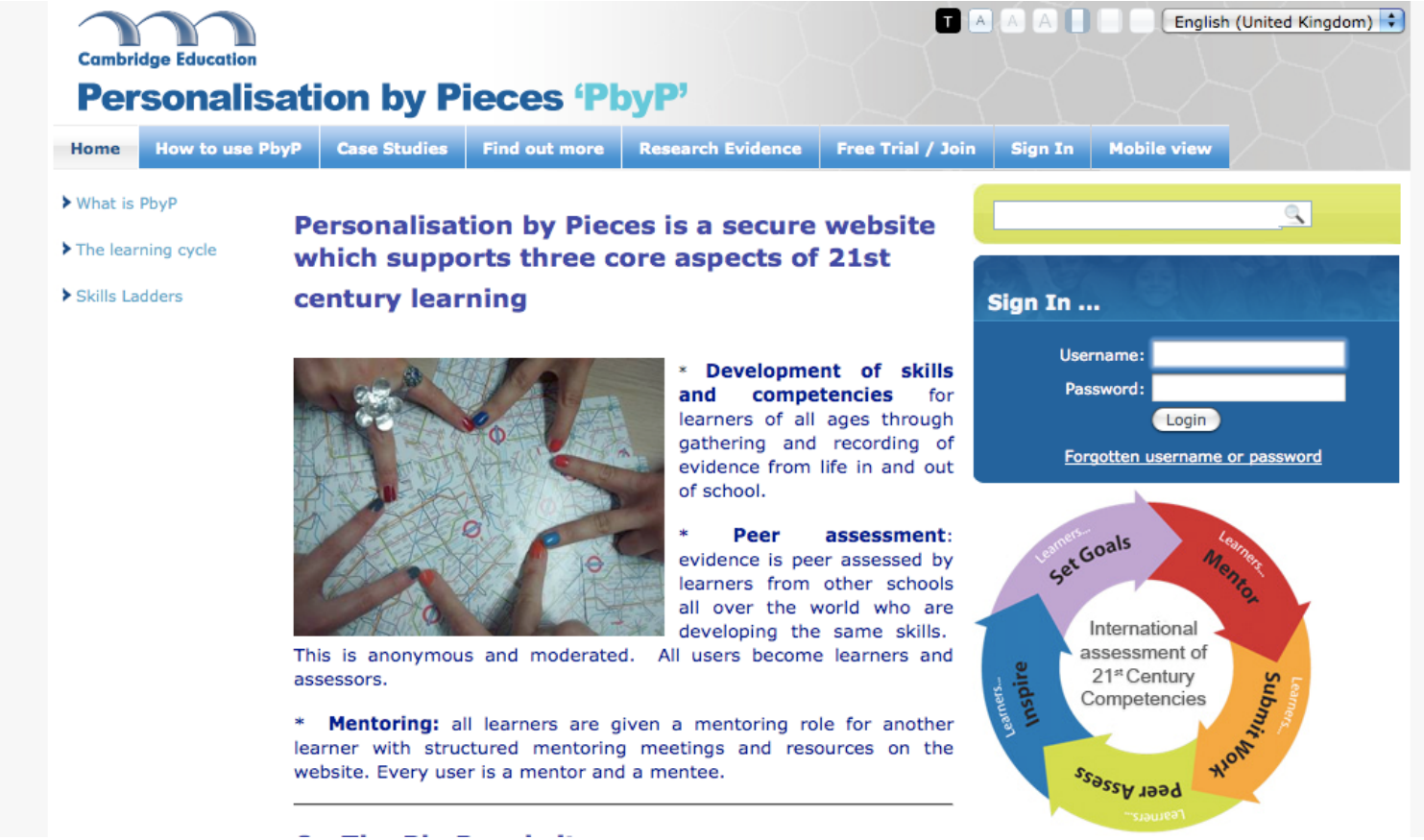
Personalization



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Learning Journeys

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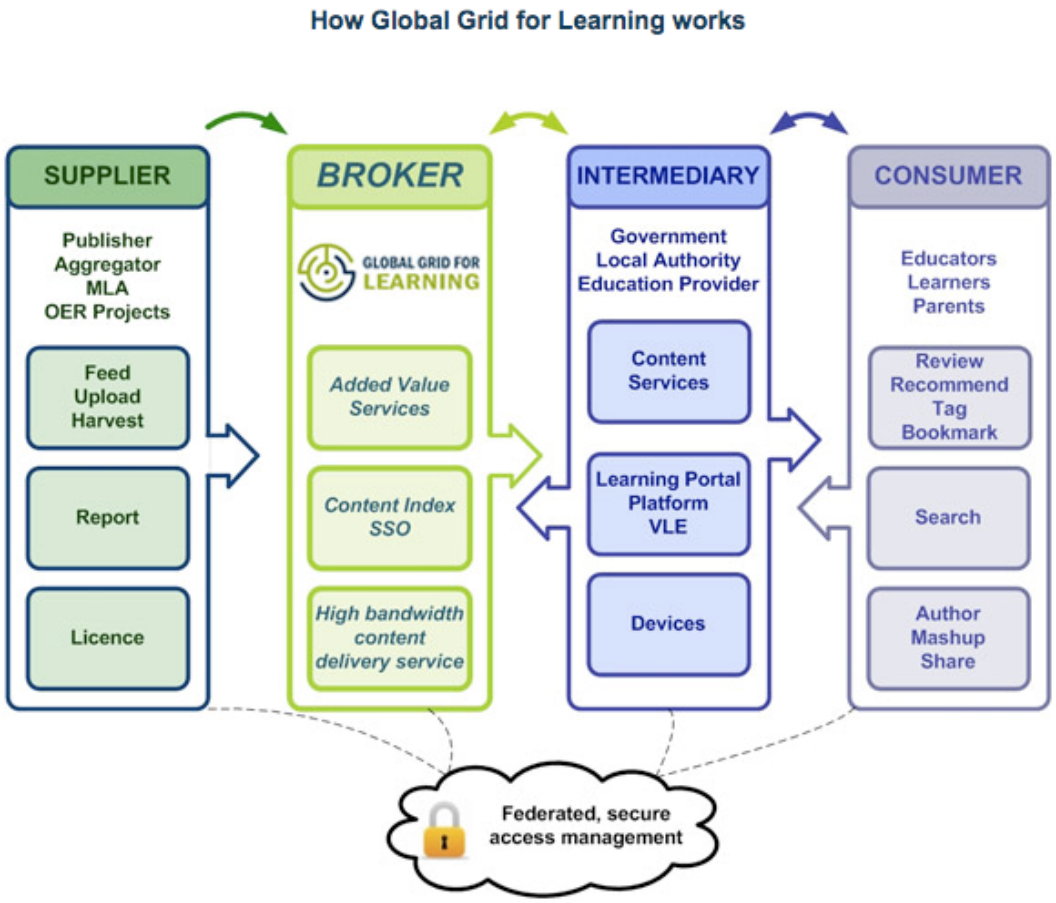
Dripfeed into Worflow



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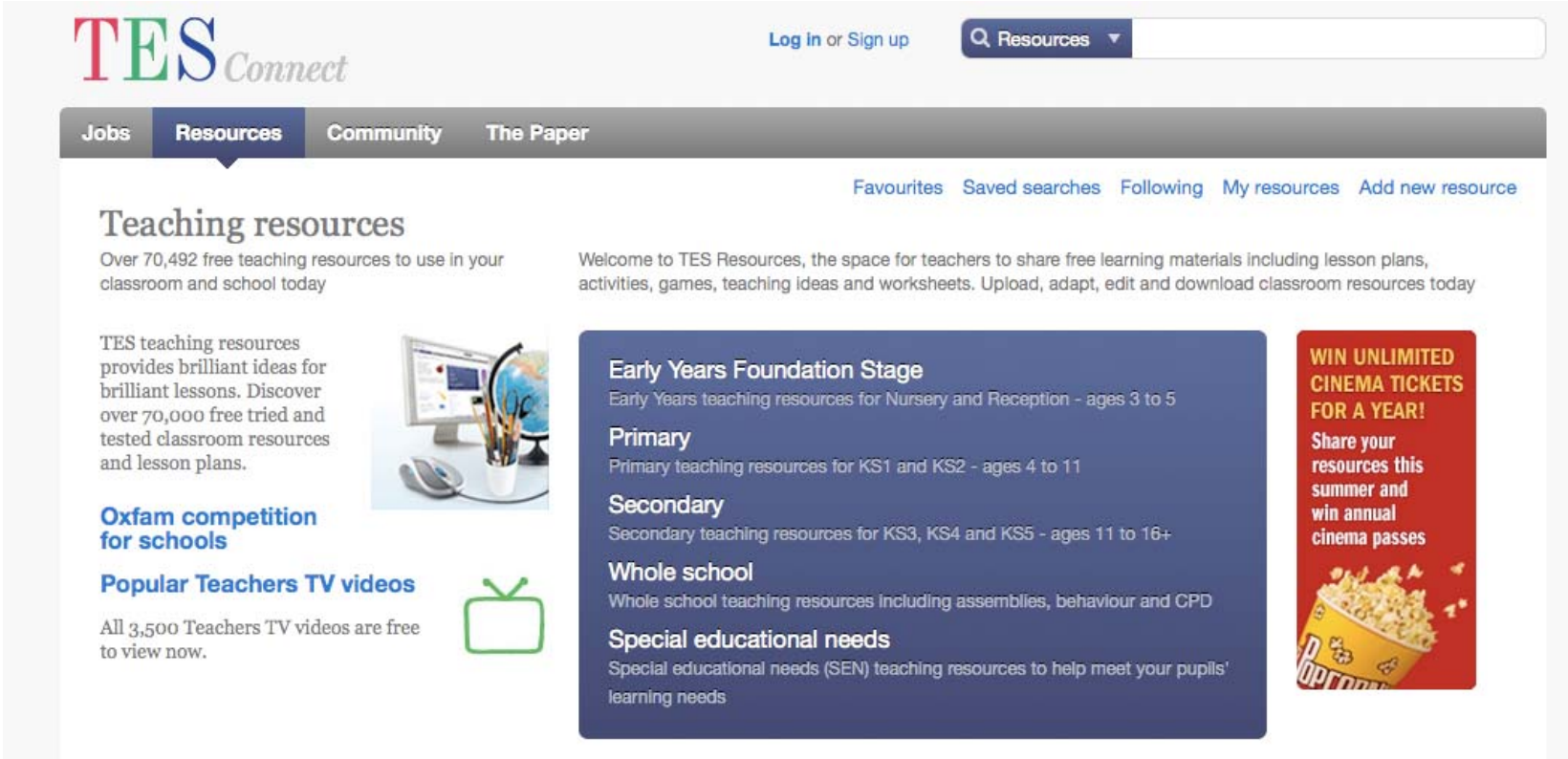
Only Connect



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Top 10 E&T Companies, Geography, 2010

Company	Est. 2010 US (% of Revenue)	Est. 2010 Americas (% of Revenue)	Est. 2010 EMEA (% of Revenue)	Est. 2010 Asia Pacific (% of Revenue)	Est. 2010 Total Revenue ($M)
Pearson Education	55.0%	65.0%	30.0%	5.0%	6,509
Benesse Corporation	3.0%	4.0%	8.0%	88.0%	3,648
McGraw-Hill Education	76.0%	78.0%	8.0%	14.0%	2,433
Houghton Mifflin Harcourt Publishing Company	80.0%	80.0%	20.0%	0.0%	1,730
Cengage Learning	88.0%	89.0%	8.0%	3.0%	1,719
Grupo Planeta	10.0%	10.0%	80.0%	10.0%	1,261
Kaplan, Inc.	89.0%	91.0%	4.0%	5.0%	1,113
Lagardere SCA	17.0%	23.0%	72.0%	5.0%	1,000
Educational Testing Service	64.0%	68.0%	27.0%	5.0%	924
Promotora de Informaciones, S.A. (PRISA)	10.0%	72.0%	28.0%	0.0%	844
Total Top 10 E&T Companies	**49.1%**	**55.7%**	**24.5%**	**19.9%**	**21,179**
Total E&T Segment 2010	**51.1%**	**59.5%**	**16.1%**	**24.5%**	**48,698**
Total E&T Segment 2009	**55.6%**	**60.8%**	**17.7%**	**21.5%**	**46,601**

Source: Outsell's Publishers & Information Providers Database

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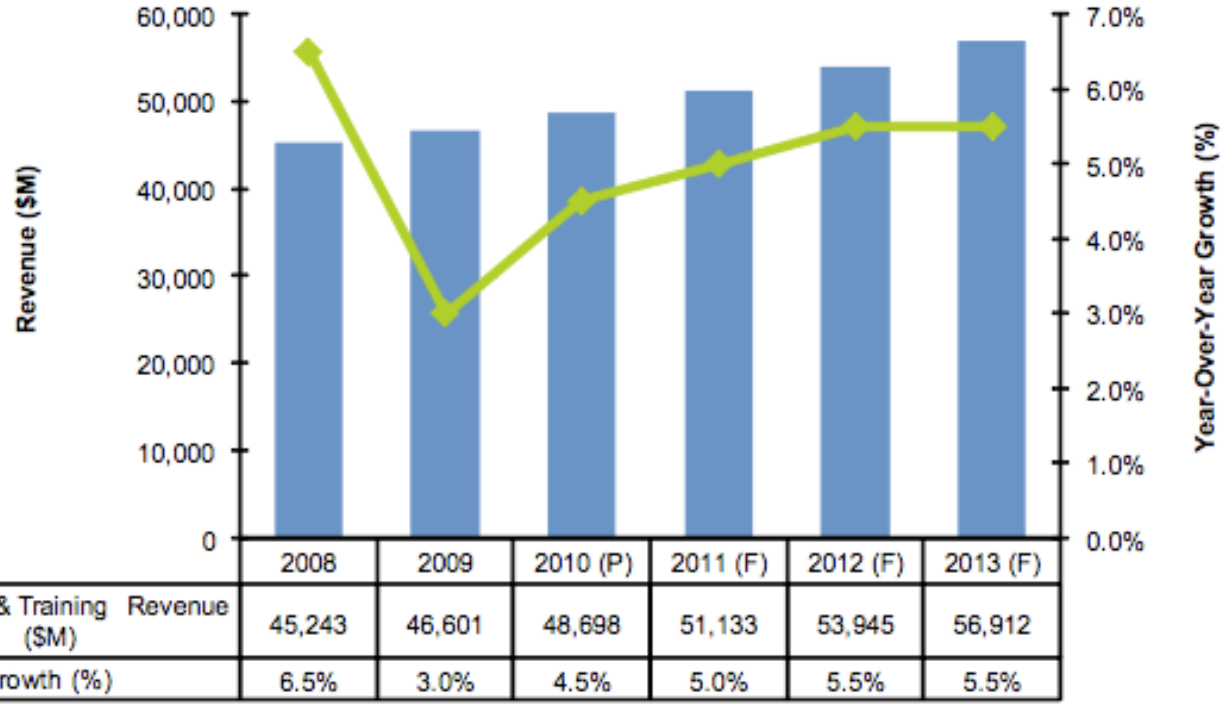
E&T Revenue and Growth Forecast, 2010-2013



	2008	2009	2010 (P)	2011 (F)	2012 (F)	2013 (F)
Education & Training Revenue ($M)	45,243	46,601	48,698	51,133	53,945	56,912
Segment Growth (%)	6.5%	3.0%	4.5%	5.0%	5.5%	5.5%

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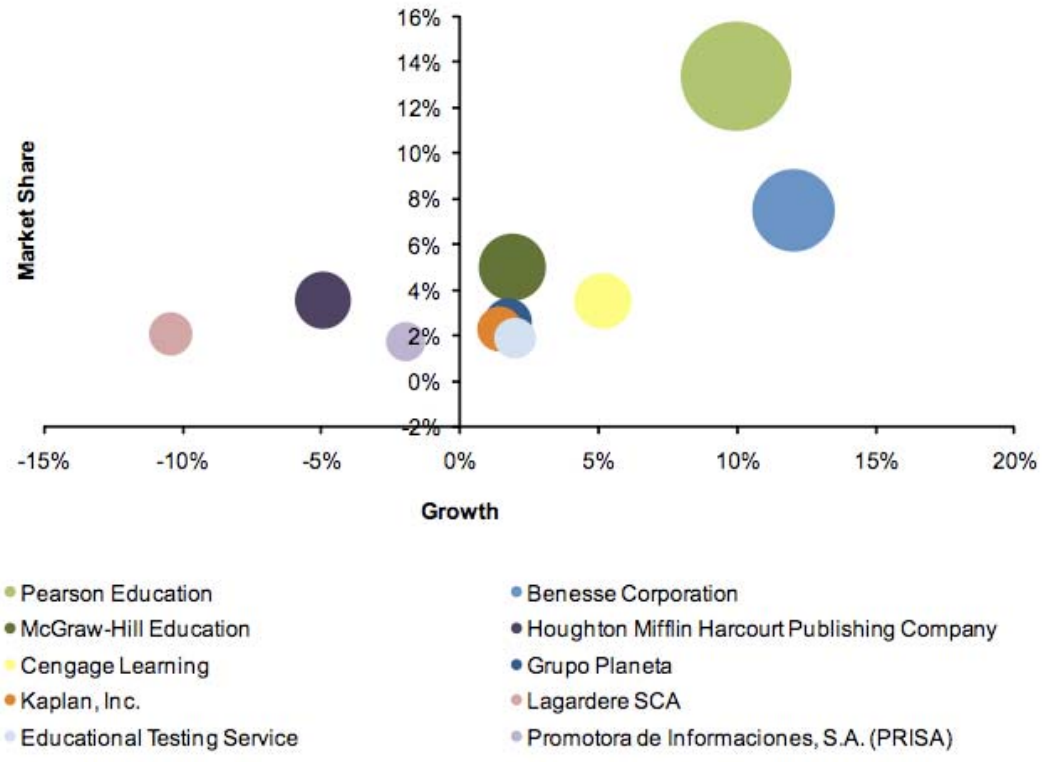
Top 10 E&T Companies, Market Share and Growth, 2010



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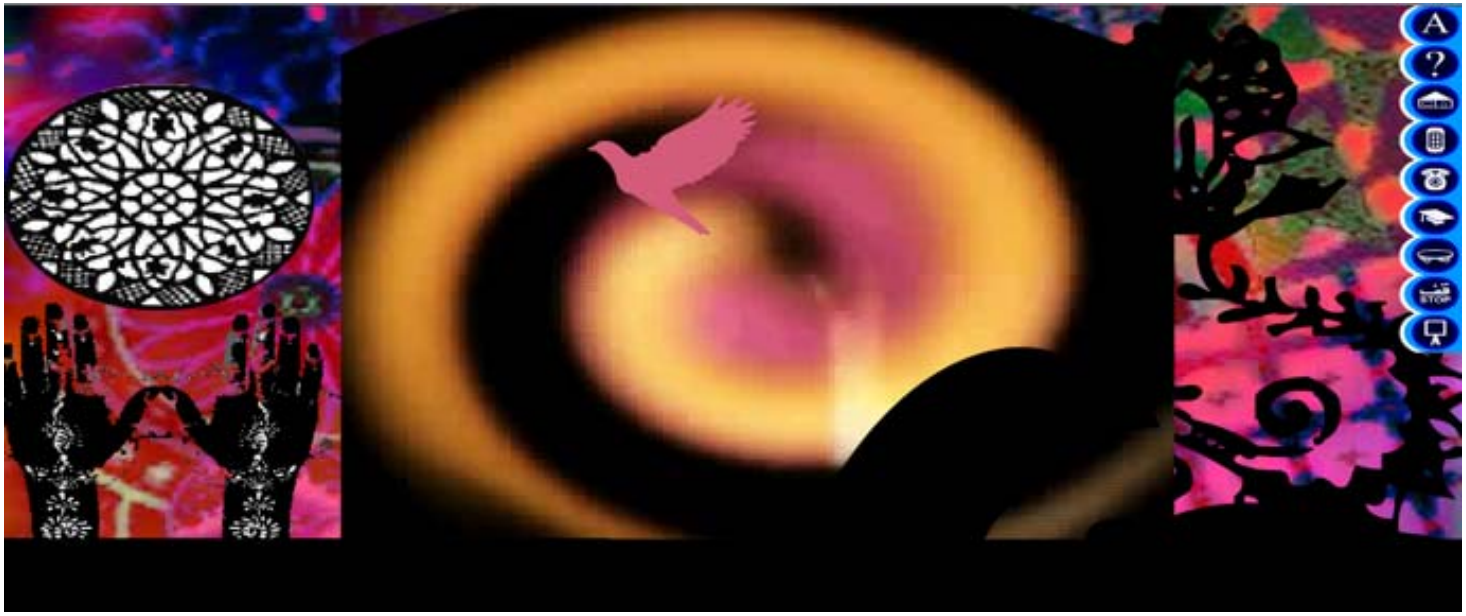
The Future of Reading and Writing is Collaborative



A Scene from episode two of “Inanimate Alice”, a digital novel that uses text, sound, images and games to tell the story of Alice and her imaginary digital friend Brad. Educators are using the series in the classroom as they explore new forms of narrative that challenge the very meaning of reading and writing.

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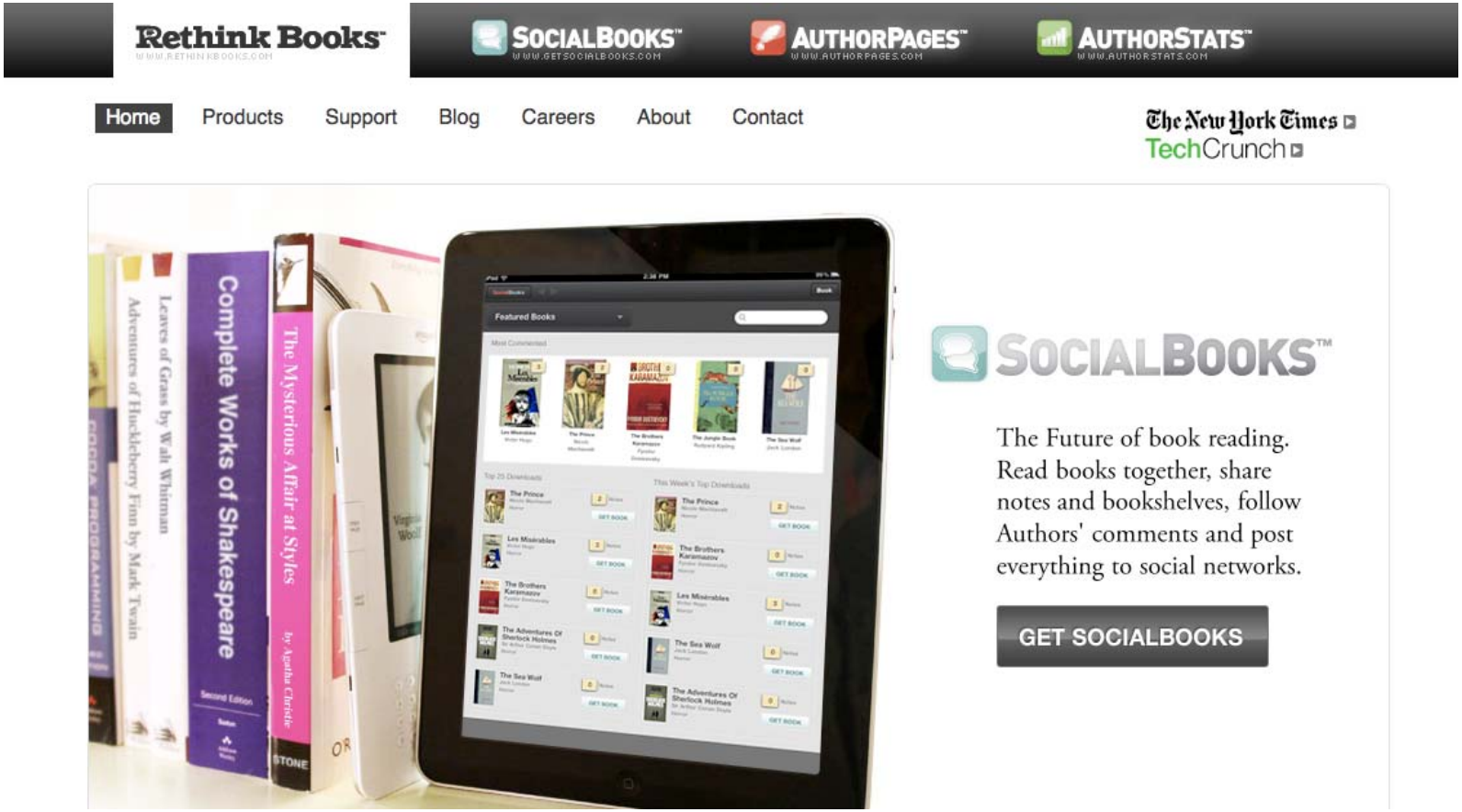
Social Nature of Reading



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Join SABL

- Society for the Abolition of Blended Learning (also known as Game Over – Move On!)
- Subscription – evidence of creating learning experiences and strategies in the network, derived from the real work of learners and teachers and moderators
- Membership – all those engaged in the future of learning (publishers may apply)

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Investing in Futures?

- The Web? Probably at the end of its development life
- The Internet? But what overlay of collaborative connectivity comes next?
- Mobile? But what is the content expression that satisfies requirements on the move?
- Tablet? What do you want the “thin client” to do?

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A Post-Modern Manifesto for Publishing

- There will be a diminishing emphasis on content, its ownership and proprietory nature
- The asset will become the understanding of customer needs, and turning that into trust and authority by virtue of satisfying those needs with solutions that satisfied my mantra: productivity gain, decision-making enhancement, and compliance management
- The business model will change in line with this, and settle around service contracts and content rental
- Users will stop being researchers or educationalists and start being fully informed participants in workflow and process
- And in order to make this happen, those who had formerly fought to the death about content ownership will cross licence content to each others' solutions, co-market solutions around shared content, enter into lifetime rental arrangements with users and generally behave in an almost exactly opposite manner to the way they have generally behaved for the last 40 years.

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Will the Big Six decide the future of Publishing?

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“It is not the strongest of the species that survive, nor the most intelligent, but the one most responsive to change”

Charles Darwin

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Thanks for listening!

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