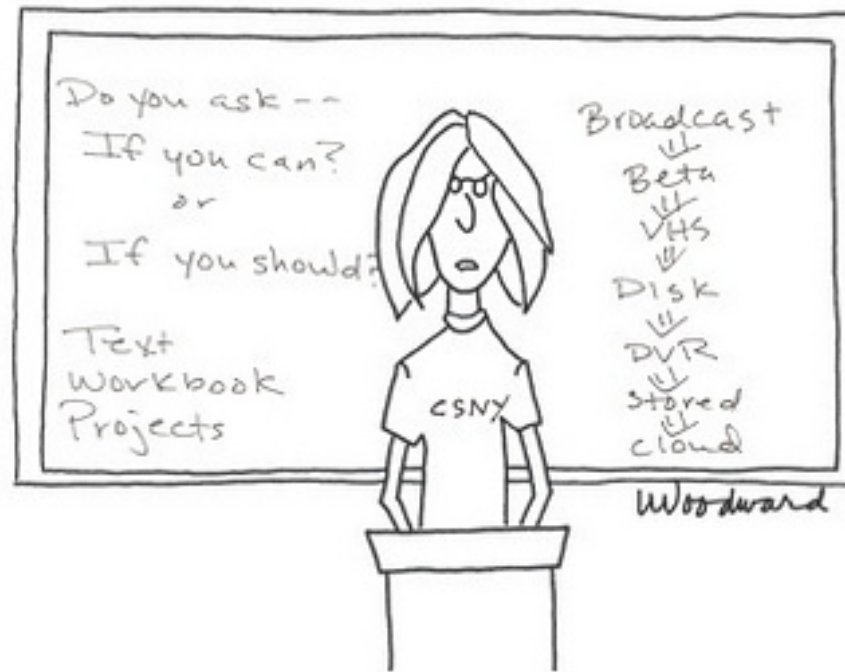




The State of Educational Publishing

David R Worlock
Microsoft UK Education Partnership Community
June 2011



*"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."*

After Einstein



**A wise man said that
“Content without Technology is
lame; Technology without Content
is Blind.”**

(Timo Hannay, Digital Science)

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

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?

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


Personalization

Cambridge Education
Personalisation by Pieces 'PbyP'

Home | How to use PbyP | Case Studies | Find out more | Research Evidence | Free Trial / Join | Sign In | Mobile view

▶ What is PbyP
▶ The learning cycle
▶ Skills Ladders

Personalisation by Pieces is a secure website which supports three core aspects of 21st century learning



- * **Development of skills and competencies** for learners of all ages through gathering and recording of evidence from life in and out of school.
- * **Peer assessment:** evidence is peer assessed by learners from other schools all over the world who are developing the same skills.
- * **Mentoring:** all learners are given a mentoring role for another learner with structured mentoring meetings and resources on the website. Every user is a mentor and a mentee.

This is anonymous and moderated. All users become learners and assessors.

International assessment of 21st Century Competencies

Learners... Inspire
Learners... Set Goals
Learners... Mentor
Learners... Submit Work
Learners... Peer Assess

Sign In ...
Username:
Password:
Login
[Forgotten username or password](#)

Learning Journeys

taecanet
Making Time for Teachers

Home Services About Us News Contact Us En / 中文 Friday, 17th June 2011

About Springboard
Virtual Classroom
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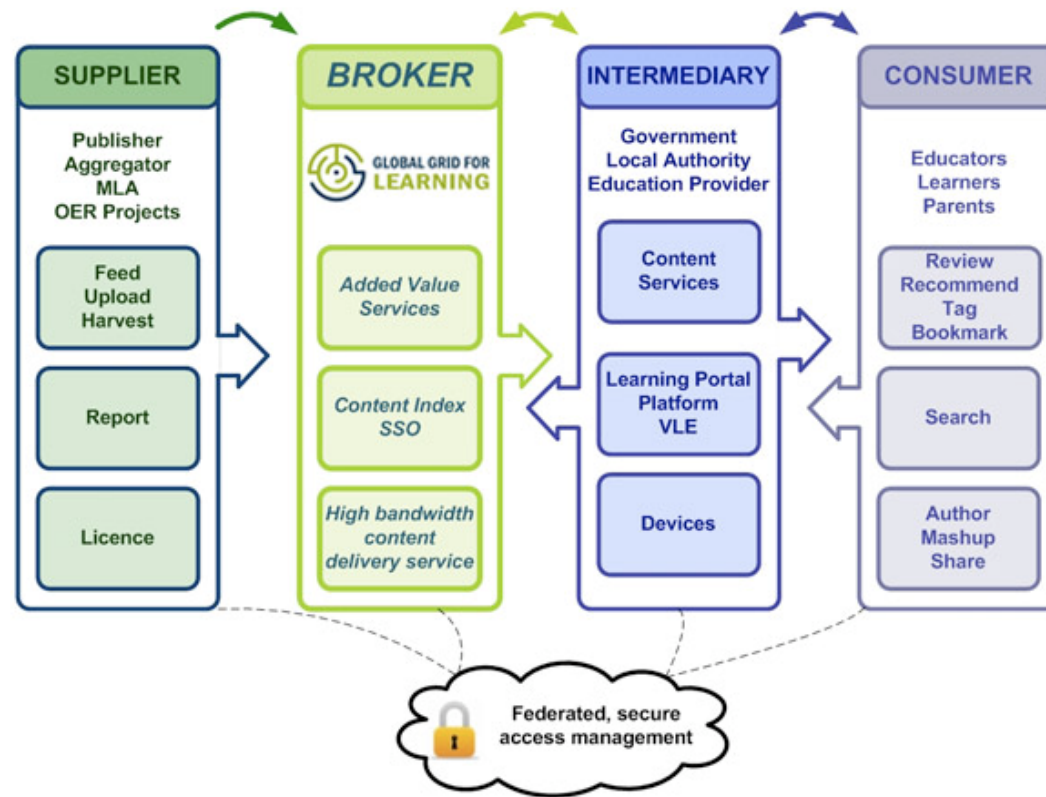
“We support the delivery of personalised learning in Schools, by providing a **fun, core curriculum based learning service, harnessing the richness of the Internet in a uniquely **safe** and **controlled** way.”**

About Taecanet Springboard

Taecanet Springboard is an exciting new web based e-learning service for Primary & Secondary schools. It uniquely combines knowledge and expertise from teachers with safe and secure web based delivery. Taecanet is part of the solution helping schools address inclusion, personalised learning and assessment. Taecanet is easy to use both for teachers & students, building confidence and delivering results from increased use of ICT across the curriculum.

Dripfeed into Workflow

How Global Grid for Learning works



Only Connect

TES Connect Log in or Sign up Resources

Jobs Resources Community The Paper

Favourites Saved searches Following My resources Add new resource

Teaching resources

Over 70,492 free teaching resources to use in your classroom and school today

Welcome to TES Resources, the space for teachers to share free learning materials including lesson plans, activities, games, teaching ideas and worksheets. Upload, adapt, edit and download classroom resources today

TES teaching resources provides brilliant ideas for brilliant lessons. Discover over 70,000 free tried and tested classroom resources and lesson plans.

Oxfam competition for schools

Popular Teachers TV videos

All 3,500 Teachers TV videos are free to view now.

Early Years Foundation Stage
Early Years teaching resources for Nursery and Reception - ages 3 to 5

Primary
Primary teaching resources for KS1 and KS2 - ages 4 to 11

Secondary
Secondary teaching resources for KS3, KS4 and KS5 - ages 11 to 16+

Whole school
Whole school teaching resources including assemblies, behaviour and CPD

Special educational needs
Special educational needs (SEN) teaching resources to help meet your pupils' learning needs

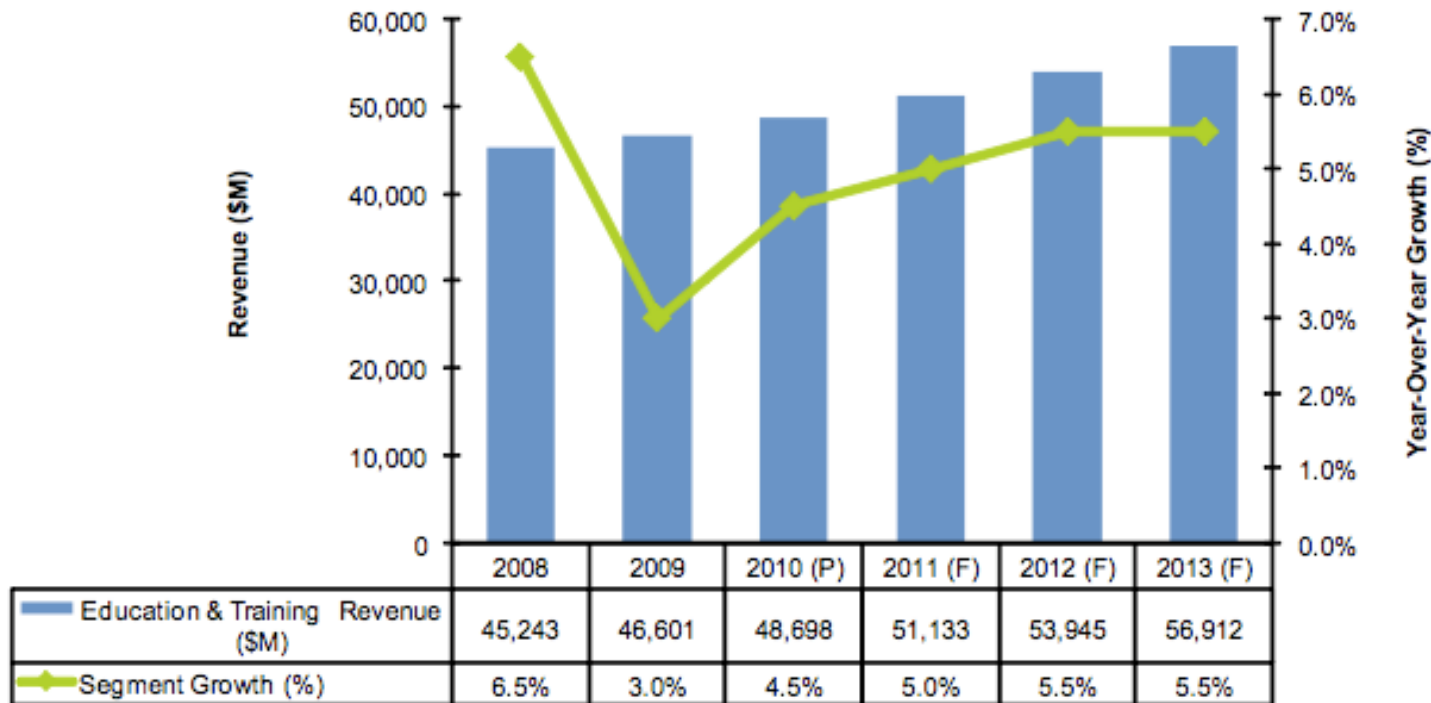
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Top 10 E&T Companies, Geography, 2010

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

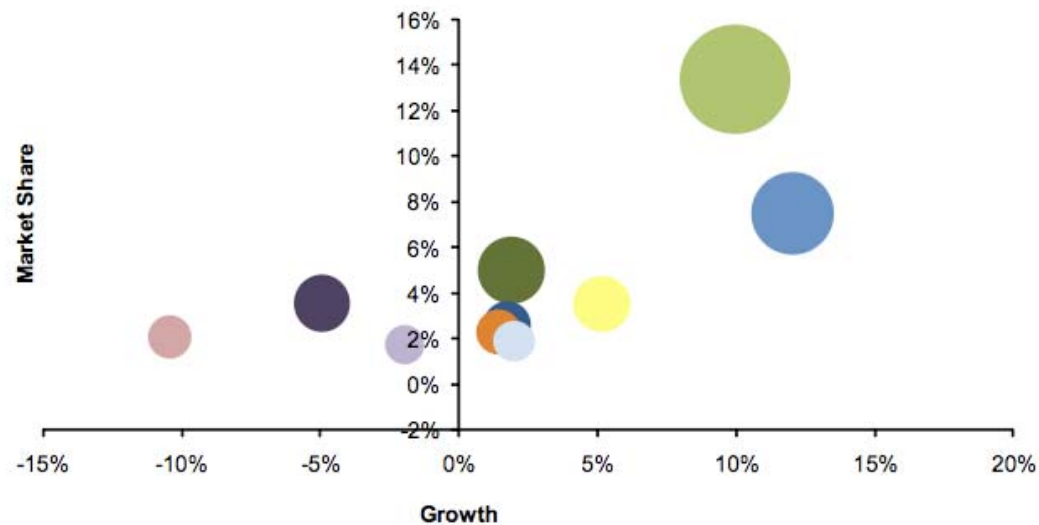
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E&T Revenue and Growth Forecast, 2010-2013



Source: Outsell's Publishers & Information Providers Database
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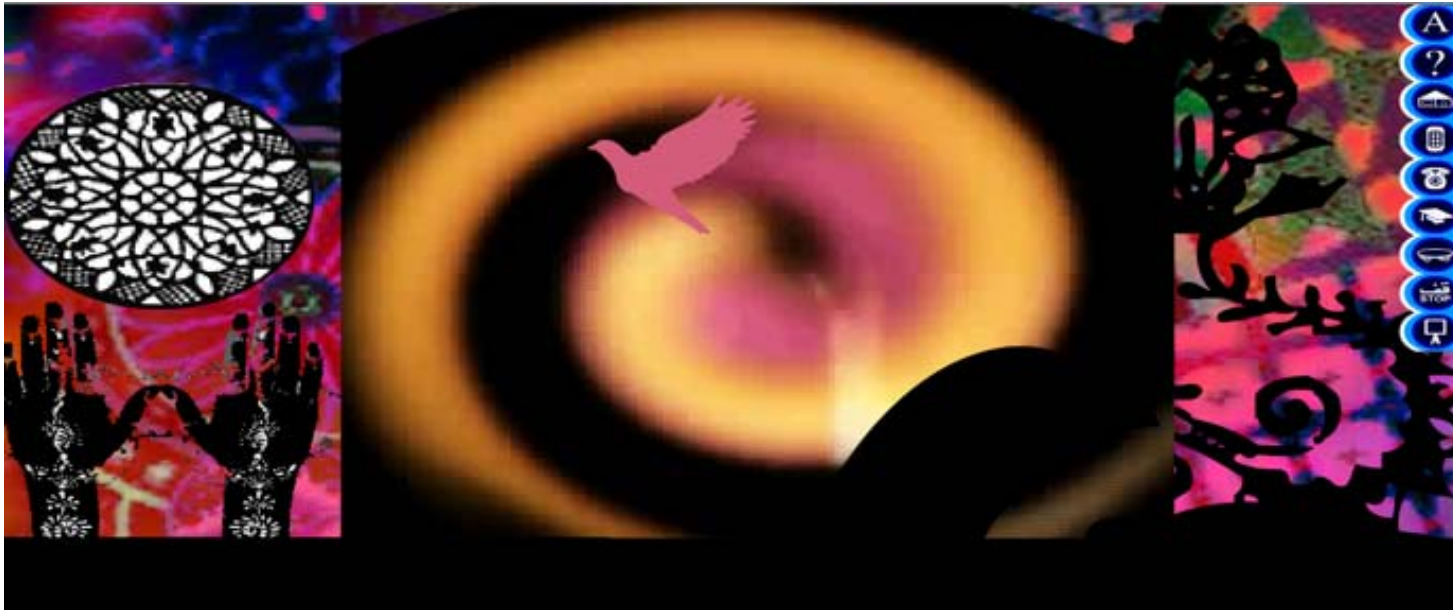
Top 10 E&T Companies, Market Share and Growth, 2010



- Pearson Education
- McGraw-Hill Education
- Cengage Learning
- Kaplan, Inc.
- Educational Testing Service
- Benesse Corporation
- Houghton Mifflin Harcourt Publishing Company
- Grupo Planeta
- Lagardere SCA
- Promotora de Informaciones, S.A. (PRISA)

Source: Outsell's Publishers & Information Providers Database
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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.


Social Nature of Reading



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The New York Times 
TechCrunch 



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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)

Investing in Futures?

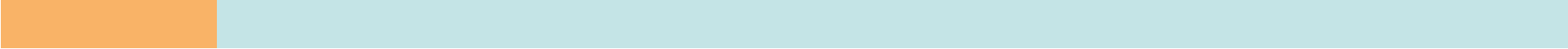
- The Web? Probably at the end of its development life
- The Internet? But what overlay of collaborative connectivity comes next?
- Mobile? But what is the content expression that satisfies requirements on the move?
- Tablet? What do you want the “thin client” to do?

A Post-Modern Manifesto for Publishing

- There will be a diminishing emphasis on content, its ownership and proprietary 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.

Will the Big Six decide the future of Publishing?

The OverDrive logo features the word "OverDrive" in a white, italicized, sans-serif font. It is set against a dark blue rectangular background with a fine, diagonal hatched pattern.The Google logo is displayed in its classic multi-colored font, with each letter in a different color: G (blue), o (red), o (yellow), g (blue), l (green), e (red).The Kobo logo consists of the word "kobo" in a lowercase, grey, sans-serif font. Below the text is a stylized graphic of an open book with a light blue cover and a white spine, with three small colored tabs (purple, pink, grey) on the right side.The Amazon.co.uk logo features the word "amazon.co.uk" in a black, lowercase, sans-serif font. A yellow curved arrow underlines the word "amazon", pointing from the letter 'a' to the letter 'z'.The INGRAM logo features a blue heraldic griffin crest on the left, followed by the word "INGRAM" in a bold, blue, uppercase, sans-serif font.



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

Charles Darwin

Thanks for listening!



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