Copyright: Schools and Higher Education
State of the Market:
Teaching, Learning and Licensing

David R Worlock
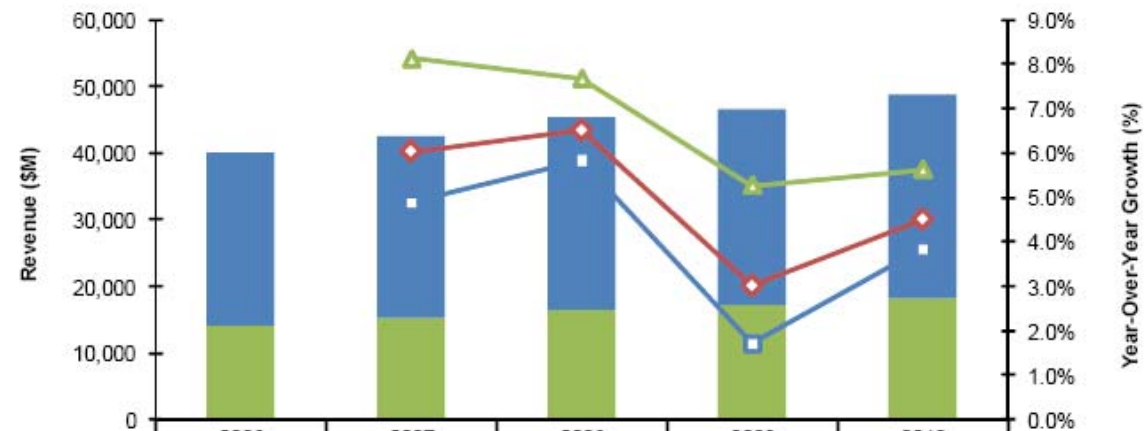
IFRRO Business Models Forum

Slovenia October 2011

Everything is Education…

- living in a networked world
- learning through each other as media go social
- formal and informal education and training found side by side
- sector growth unmatched in the industry

…and there is education in everything

E&T Market Size and Growth, 2006-2010

|	2006	2007	2008	2009	2010
Education Content Subsegment ($M)	25,963	27,231	28,820	29,312	30,436
Training Content Subsegment($M)	14,104	15,251	16,423	17,289	18,262
Education Content Subsegment Growth (%)		4.9%	5.8%	1.7%	3.8%
Training Content Subsegment Growth (%)		8.1%	7.7%	5.3%	5.6%
Total E&T Segment Growth (%)		6.0%	6.5%	3.0%	4.5%

Source: Outsell's Publishers & Information Providers Database
© 2011 Outsell, Inc. Reproduction strictly prohibited.

E&T Subsegment Market Share, 2011
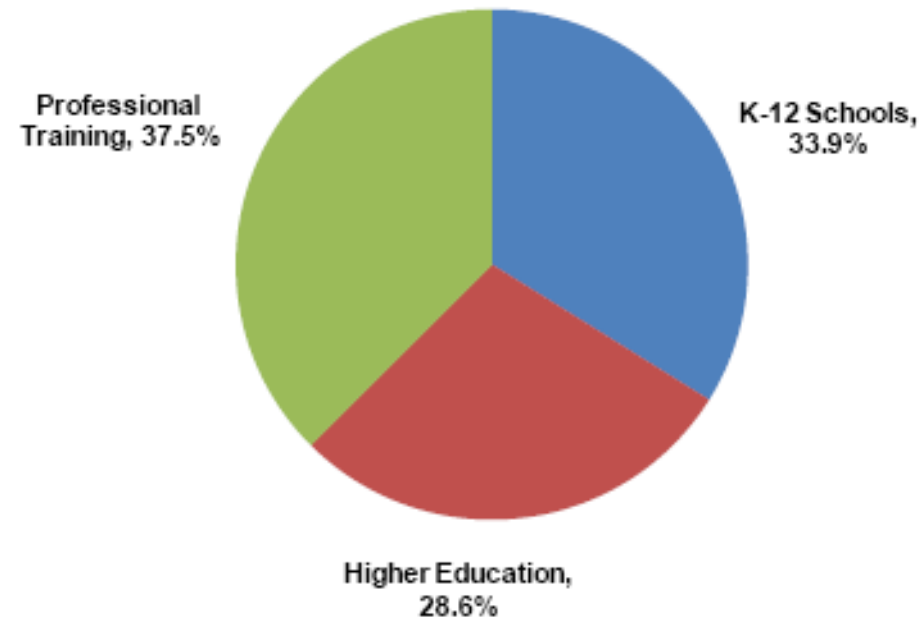
Professional Training, 37.5%

K-12 Schools, 33.9%

Higher Education, 28.6%

Source: Outsell's Publishers & Information Providers Database
© 2011 Outsell, Inc. Reproduction strictly prohibited.

2011 Information Industry Benchmark Survey Composition
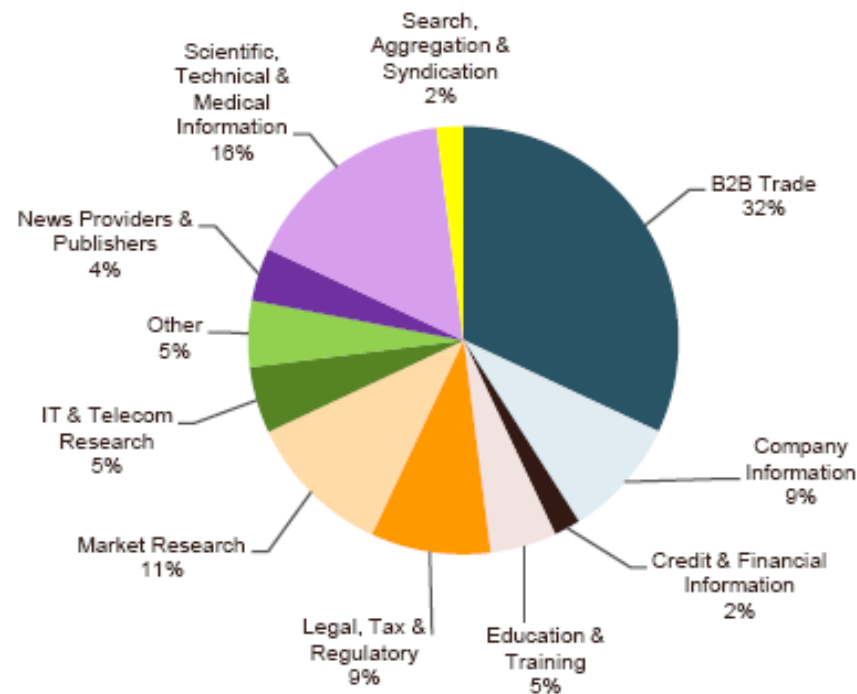
Source: Outsell's Information Industry Benchmark Study, June 2011
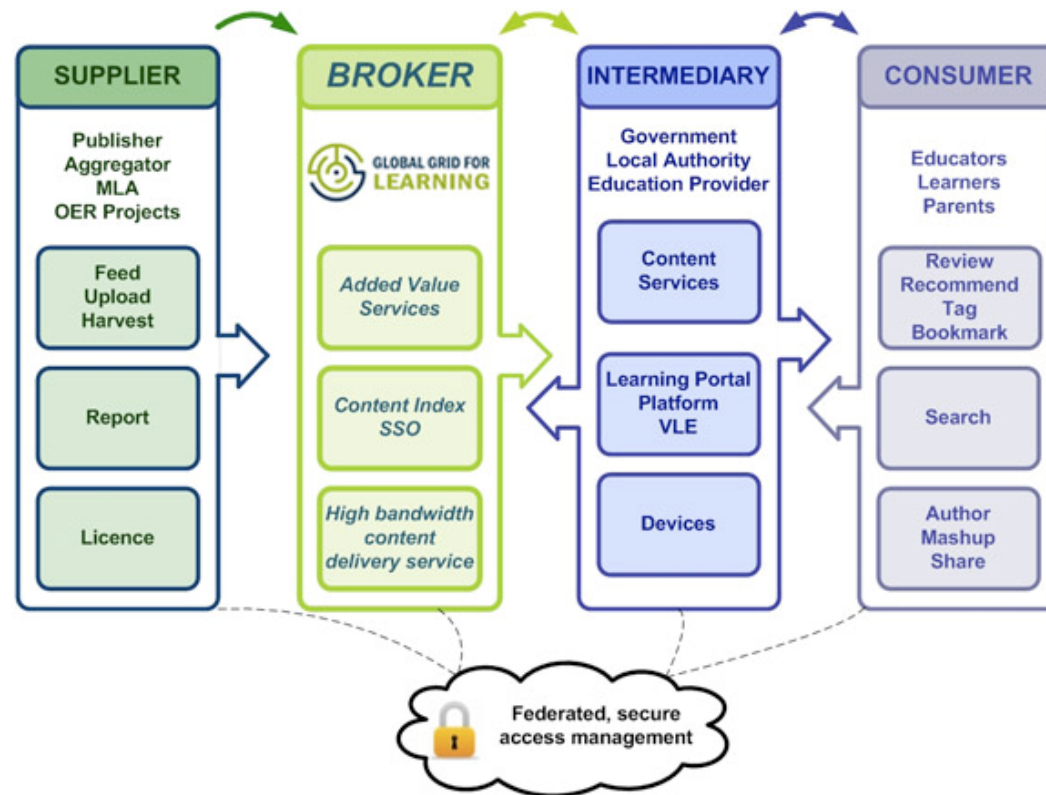©2011 Outsell, Inc. Reproduction strictly prohibited.

5

Welcome to the Networked Society

- Profound changes in relationships

- Community is easy to externalize and express

- Collaboration is a key outcome

- Learning is a feature of collaboration

- Real and virtual world relationships cease to work in parallel

- Disintermediation and Reintermediation

Dripfeed into Workflow

How Global Grid for Learning works

Only Connect

The Social Nature of Reading

5 Stages of Workscape Evolution
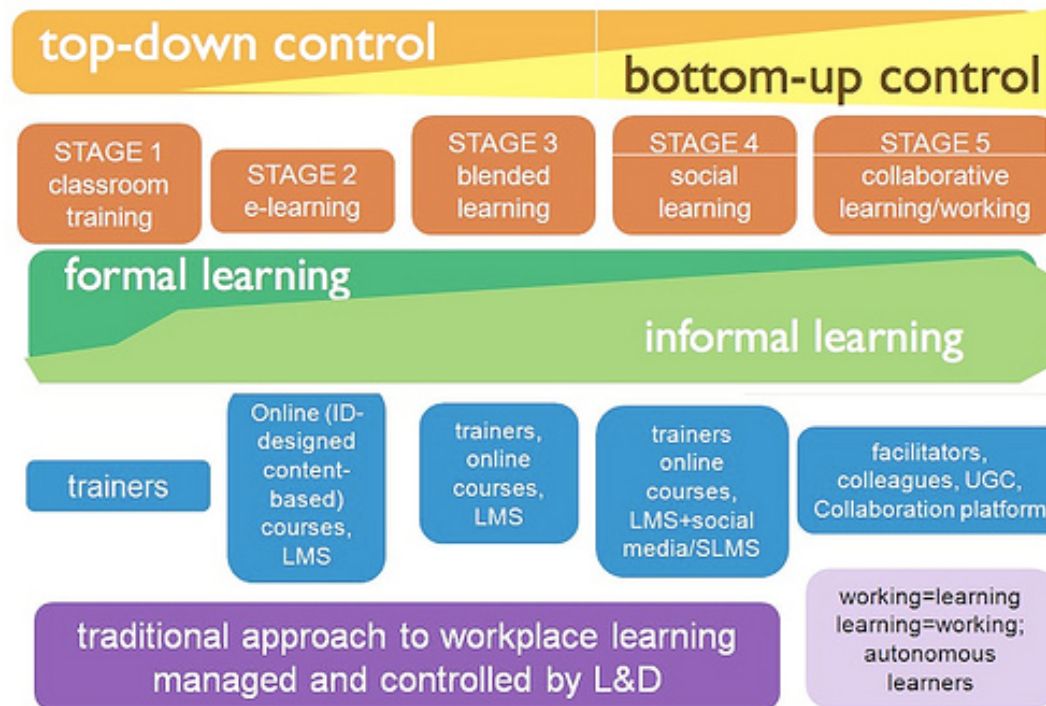
Taken from Informal Learning Blog by Jay Cross and Internet Time Group

The Role of the Publisher

- The Process Role

- The Preservation Role

- The Investor Role

- The Systems Integration Role

- The Content Aggregator Role

- The Value Add Role

- The "Ringmaster" Role

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?

Learning and Licensing

- Digital anarchy or blanket licensing

- Implied licenses and meters

- Payment systems and permissions

- Who owns what and does it matter?

What are we licensing?

- Content?

- Learning Objects?

- Access to searchable metadata?

- Usage?

What happens after usage?

- Granular re-usage?

- Residual rights?

- Resale opportunity/registration of "new" property?

Conclusions

- Licensing will enable the digital marketplace

- Content will be less important and cheaper to lease

- Educational privilege rights will disappear

- Licensing may be implied in systems or nationally mandated

- The mutation of content in network usage will be fully recognized

After Einstein

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

(Timo Hannay, Digital Science)

Thanks for listening!

Contact David Worlock at
david@davidworlock.com

Tel: 07836 361873

On Twitter at dworlock

And come to www.davidworlock.com