The State of Educational Publishing

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

1. **Development of skills and competencies** for learners of all ages through gathering and recording of evidence from life in and out of school.

2. **Peer assessment**: evidence is peer assessed by learners from other schools all over the world who are developing the same skills. All users become learners and assessors.

3. **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.
Learning Journeys

“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.”

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 Worflow

How Global Grid for Learning works

SUPPLIER
- Publisher Aggregator MLA OER Projects
- Feed Uploaded Harvest
- Report
- Licence

BROKER
- Added Value Services
- Content index SSO
- High bandwidth content delivery service

INTERMEDIARY
- Content Services
- Learning Portal Platform VLE
- Devices

CONSUMER
- Educators Learners Parents
- Review Recommend Tag Bookmark
- Search
- Author Mashup Share

Federated, secure access management

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Only Connect
# Top 10 E&T Companies, Geography, 2010

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<td>Pearson Education</td>
<td>55.0%</td>
<td>65.0%</td>
<td>30.0%</td>
<td>5.0%</td>
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<td>Benesse Corporation</td>
<td>3.0%</td>
<td>4.0%</td>
<td>8.0%</td>
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<td>McGraw-Hill Education</td>
<td>76.0%</td>
<td>78.0%</td>
<td>8.0%</td>
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<td>Houghton Mifflin Harcourt</td>
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<td>80.0%</td>
<td>20.0%</td>
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<td>Educational Publishing Company</td>
<td>80.0%</td>
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<td>Cengage Learning</td>
<td>88.0%</td>
<td>85.0%</td>
<td>8.0%</td>
<td>3.0%</td>
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<td>Grupo Planeta</td>
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<td>10.0%</td>
<td>80.0%</td>
<td>10.0%</td>
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<td>Kaplan, Inc.</td>
<td>89.0%</td>
<td>91.0%</td>
<td>4.0%</td>
<td>5.0%</td>
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<td>Lagardere SCA</td>
<td>17.0%</td>
<td>23.0%</td>
<td>72.0%</td>
<td>5.0%</td>
<td>1,000</td>
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<td>Promotora de Informaciones, S.A.</td>
<td>10.0%</td>
<td>72.0%</td>
<td>28.0%</td>
<td>0.0%</td>
<td>844</td>
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<tr>
<td><strong>Total Top 10 E&amp;T Companies</strong></td>
<td><strong>49.1%</strong></td>
<td><strong>55.7%</strong></td>
<td><strong>24.5%</strong></td>
<td><strong>19.9%</strong></td>
<td><strong>21,179</strong></td>
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<td><strong>Total E&amp;T Segment 2010</strong></td>
<td><strong>51.1%</strong></td>
<td><strong>59.5%</strong></td>
<td><strong>16.1%</strong></td>
<td><strong>24.5%</strong></td>
<td><strong>48,698</strong></td>
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<td><strong>Total E&amp;T Segment 2009</strong></td>
<td><strong>55.6%</strong></td>
<td><strong>60.8%</strong></td>
<td><strong>17.7%</strong></td>
<td><strong>21.5%</strong></td>
<td><strong>46,601</strong></td>
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Source: Outsell’s Publishers & Information Providers Database
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

Source: Outsell's Publishers & Information Providers Database
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

The Future of book reading. Read books together, share notes and bookshelves, follow Authors’ comments and post everything to social networks.

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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?
“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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