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

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IFRRO Business Models Forum
Slovenia October 2011
Everywhere 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

<table>
<thead>
<tr>
<th>Year</th>
<th>Education Content Subsegment ($M)</th>
<th>Training Content Subsegment ($M)</th>
<th>Education Content Subsegment Growth (%)</th>
<th>Training Content Subsegment Growth (%)</th>
<th>Total E&amp;T Segment Growth (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>25,963</td>
<td>14,104</td>
<td>4.9%</td>
<td>8.1%</td>
<td>6.0%</td>
</tr>
<tr>
<td>2007</td>
<td>27,231</td>
<td>15,251</td>
<td>5.8%</td>
<td>7.7%</td>
<td>6.5%</td>
</tr>
<tr>
<td>2008</td>
<td>28,620</td>
<td>16,423</td>
<td>1.7%</td>
<td>5.3%</td>
<td>3.0%</td>
</tr>
<tr>
<td>2009</td>
<td>29,312</td>
<td>17,289</td>
<td>3.8%</td>
<td>5.0%</td>
<td>4.5%</td>
</tr>
<tr>
<td>2010</td>
<td>30,436</td>
<td>18,262</td>
<td></td>
<td></td>
<td></td>
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</tbody>
</table>

Source: Outsell Publishers & Information Providers Database
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 Information Industry Benchmark Survey Composition

Source: Outsell's Information Industry Benchmark Study, June 2011
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

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

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

INTERMEDIARY
- Government
- Local Authority
- Education Provider
- 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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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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The Social Nature of Reading
5 Stages of Workscape Evolution

(c) CLPLT 2010
Original model: Jane Hart
Orange and green: Jay Cross

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

(Timo Hannay, Digital Science)
Thanks for listening!

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