

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

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IFRRO Business Models Forum

Slovenia October 2011

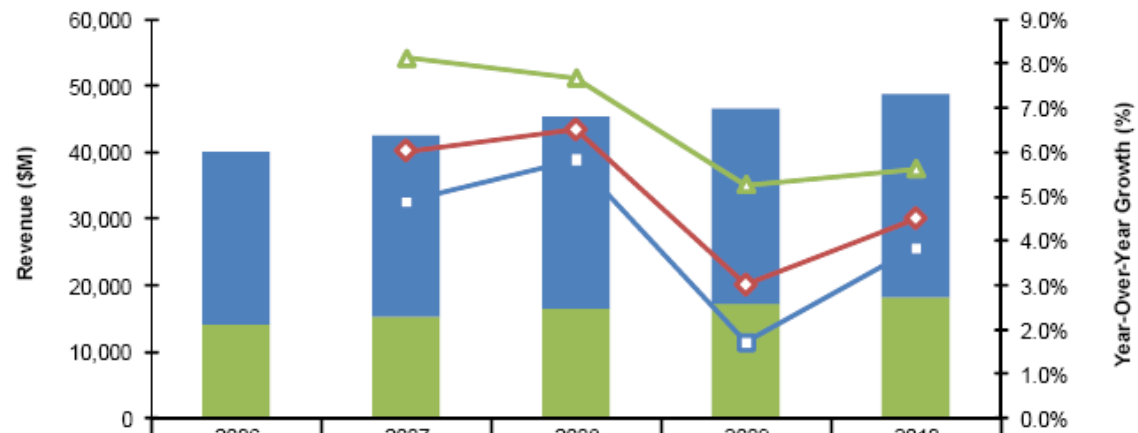


Everything is Education...

- 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

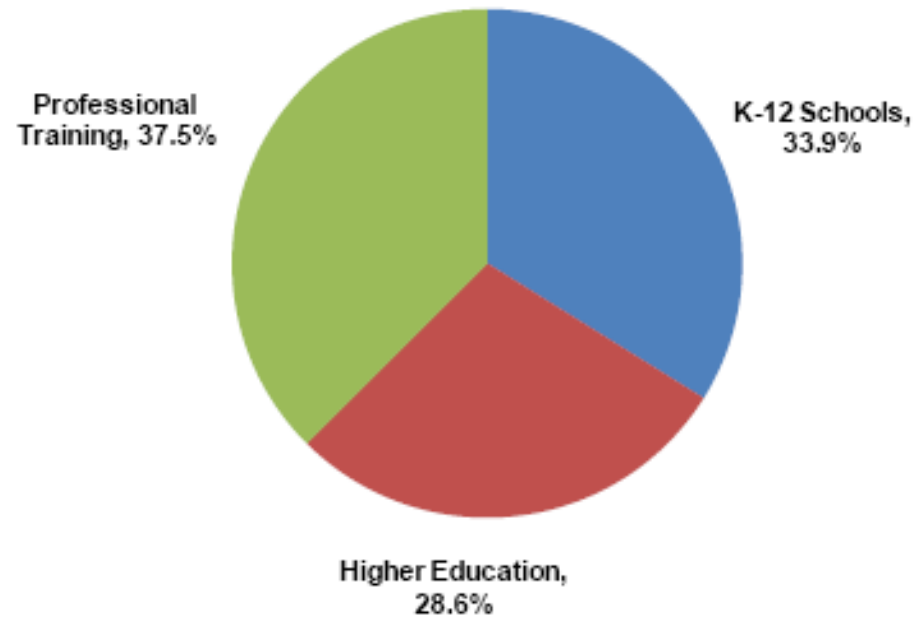
E&T Market Size and Growth, 2006-2010



| | | | | | |
|---|--------|--------|--------|--------|--------|
| 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% |

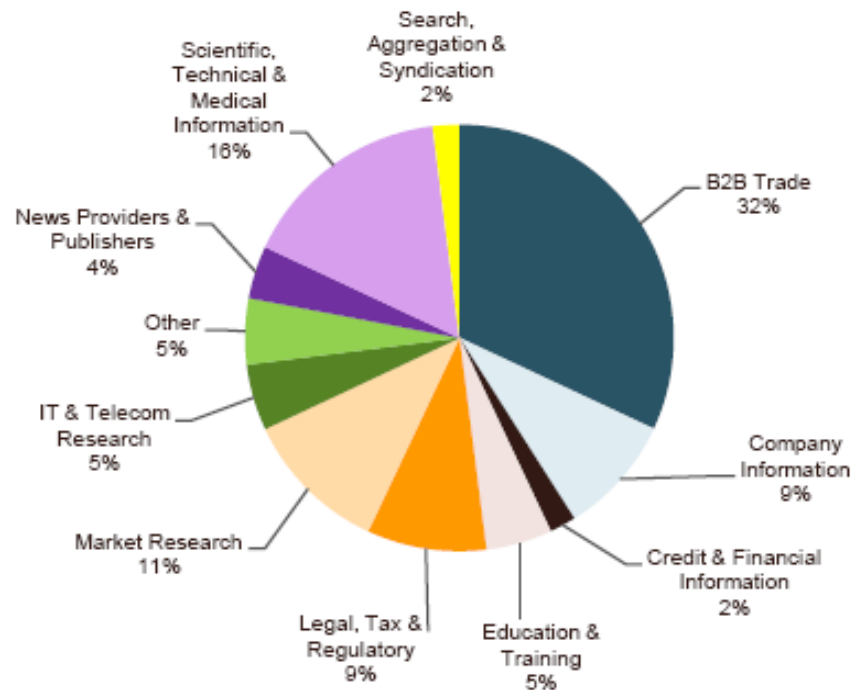
Source: Outsell's Publishers & Information Providers Database
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E&T Subsegment Market Share, 2011



Source: Outsell's Publishers & Information Providers Database
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2011 Information Industry Benchmark Survey Composition



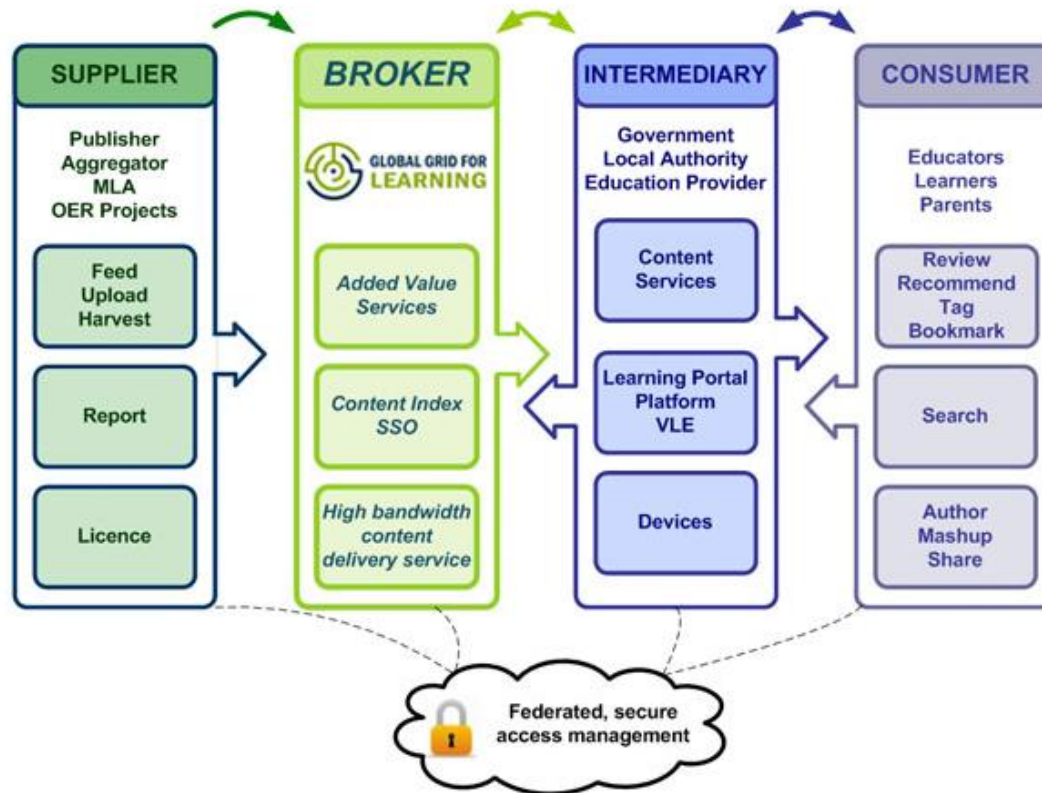
Source: Outsell's Information Industry Benchmark Study, June 2011
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Welcome to the Networked Society

- 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 screenshot shows the TES Connect website. At the top left is the TES Connect logo. To the right are links for 'Log in or Sign up' and a search bar with 'Resources' selected. Below this is a navigation bar with 'Jobs', 'Resources', 'Community', and 'The Paper'. The 'Resources' section is active, showing a list of links: 'Favourites', 'Saved searches', 'Following', 'My resources', and 'Add new resource'. The main content area is titled 'Teaching resources' and includes a sub-header 'Over 70,492 free teaching resources to use in your classroom and school today'. Below this are three promotional boxes: 'Oxfam competition for schools', 'Popular Teachers TV videos', and a large blue box for 'Early Years Foundation Stage' which lists 'Primary' and 'Secondary' resources. To the right of the blue box is a red promotional banner for 'WIN UNLIMITED CINEMA TICKETS FOR A YEAR!' with an image of popcorn.

TES Connect [Log in or Sign up](#)


[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


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

WIN UNLIMITED CINEMA TICKETS FOR A YEAR!
Share your resources this summer and win annual cinema passes



The Social Nature of Reading

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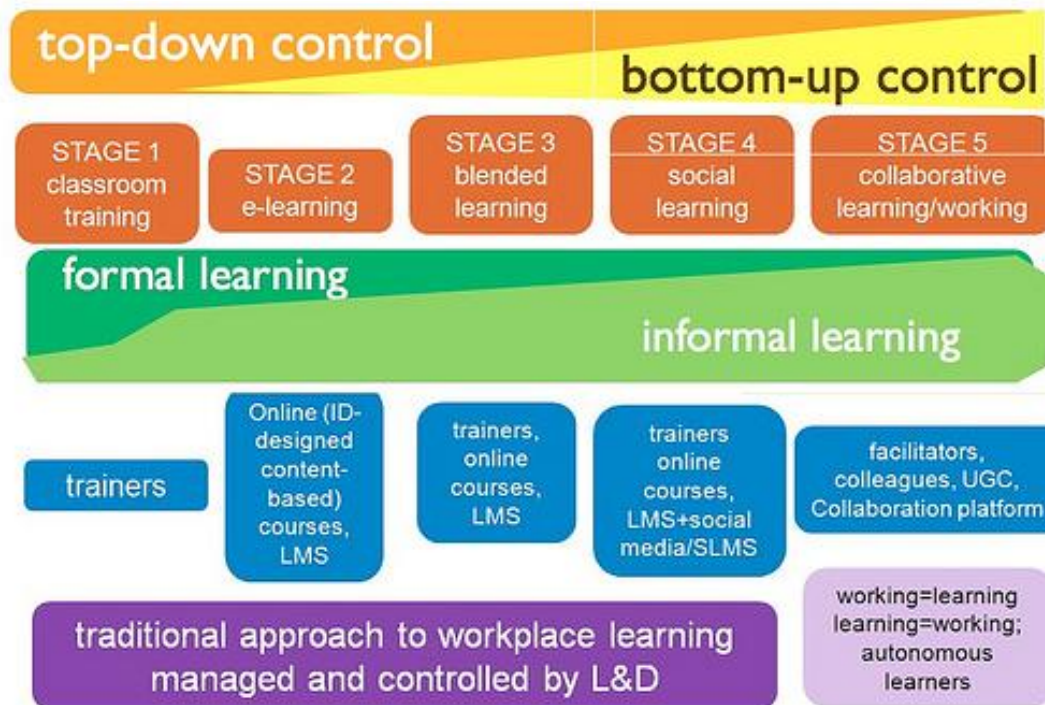


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everything to social networks.

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5 Stages of Workscape Evolution



(c) C4LPT, 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

After Einstein

**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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