EDITUS: LEARNING CONTENT MANUFACTURING—PUBLISHING

Scholarly and academic content publishing has relied upon a close partnership between authors (often faculty) and "manufacturers" (typically publishers). Digital disruption, changes in teaching and learning, and the rise of new consumer expectations and product innovations are creating extreme pressure on the traditional model and leading to revolutionary changes within the incumbent publishing companies. New digital adaptive learning products and platforms could alter the face of learning content in substantial ways and for years to come.

Key Points

1. The act of scholarly publishing was designed both to diffuse new knowledge and confer credit on its discoverer. It initially was controversial, unprofitable, and widely ridiculed.

2. The transition to digital textbooks and other learning content is proceeding slowly—disrupting the publishing industry in key ways:

   a. Pedagogy is evolving: The *lectio* mode is being supplemented or replaced.

   b. The ante in academic publishing is rising.

   c. Rich primary and secondary resources are within easy reach—often at no cost to users.

   d. A stubborn OER movement is maturing and strives to "liberate" learning content manufacturing from the publishers.

   e. Digital media stimulate changes in human behavior, patterns of consumption, and preferences.

3. A key challenge for academia and its publishers is maintaining the integrity of the peer review process, while making the process faster and more transparent.

4. The key trends in learning content manufacturing include:

   a. Publishers making significant investments in digital capabilities to enable learning content to do more and go further digitally.

   b. Rising rental of physical and digital textbooks and the emergence of online sourcing as standard store practice are both depressing sales of new textbooks.

   c. The critical need to make learning content discoverable and useable internationally.

   d. Publishers turning focus to courseware and monetizing content by incorporating licenses into the courseware they sell.

5. As publishing and education become increasingly dependent on cost containment, service quality, globalization, demonstration of outcomes, and sophisticated technologies, they must increasingly look over their shoulders at giants like Amazon, Google, Facebook, and Apple.

Mapping the Learning Content Ecosystem
SCORECARD
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Supplier Power

- Rise of superstar faculty raises costs + "the bar"
- OER, MOOCs, and open web offer suppliers new channels

Buyer Power

- The Long Tail (like print textbooks)
- E-commerce savvy consumers
- Knowledge of channels, pirate sites…
- Possible decline in faculty authority over student preferences
- Alternate sources like YouTube
- Course materials fee could be game changer

Rivalry Level*: 4

Rivalry is intense with pressure to "grow or go."

New Entrants

- Amazon Press? Google Press? Apple Press? Facebook Press?
- Barnes & Noble + Flashnotes?
- Uber/Lyft for textbooks?
- Rise of 3rd party content curators (Ace Learning)
- Shift to competency-based education

Substitutes

- OER
- Library e-reserves
- Informal content (e.g., Khan Academy, Wikipedia)
- Content exchanges and the sharing economy (think Uber for textbooks)

*Rivalry is an indication of competition in the segment from 1-lowest to 5-highest; both among current players and between them and new entrants.

Critical Questions: Learning Content Manufacturing—Publishing

1. *What percent of your campus faculty are experimenting or using different forms of learning content (YouTube videos, online articles, etc.) or teaching styles (e.g., flipped classroom, Socratic Method, learning/ group activities)? Are there members of the academic community on campus you could engage with to learn more?*

2. *Are OER materials being used or discussed on your campus? By whom? In what ways? What is your level of knowledge about, and comfort with, discussing OERs as well as the creators and repositories of these materials?*

3. *To what extent are custom print or digital course materials in use on your campus? Is this a potential growth area?*

4. *What is the status of your relationships with the industry's learning content publishers? Of their business models and future corporate direction? Are there others on your campus who are having conversations with these content providers—with or without your involvement?*

5. *Is the store seen as a resource (or the expert) on copyright and copyright clearance for learning content on campus? If not, is there a role for the store to play in this area?*

6. *Does your campus have a learning/course content strategy in development or in place? Are store leaders involved in this effort? If no to either, how can the store initiate or get involved in the campus' effort?*

7. *Are you communicating to the relevant campus stakeholders about the changes happening in learning content creation and publishing—and the potential implications for store sales, products, and services?*