

E-learning market update Winter 2013

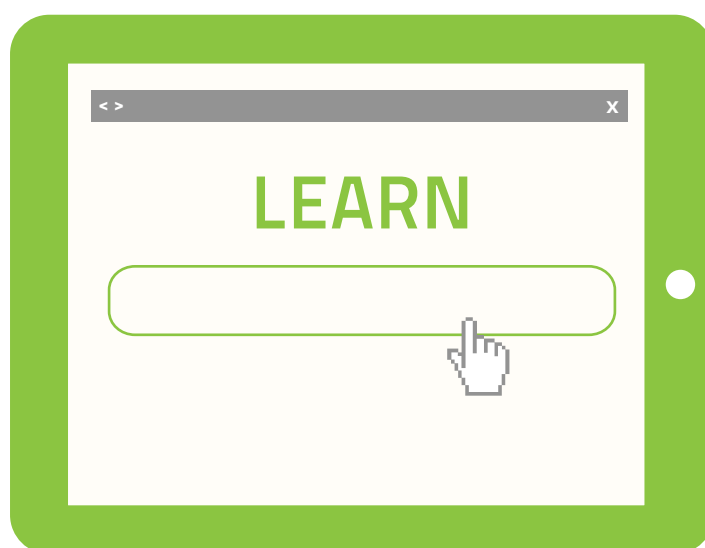
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1. Links between corporate learning and education

There are more links and similarities between workplace learning and general education than ever before. With the restructure towards Academies within the UK education sector more schools are being run along the lines of businesses, with business leaders being brought in to advise and assist.

Equally schools & universities can often lead innovation within the e-learning sector, a lot of recent innovations like flipped classrooms and MOOCs have been first deployed within educational establishments before being adopted by the business sector. Schools can look to leverage the investment businesses can bring by partnering and helping lead regional innovation.



Skillsanywhere is an initiative to have corporations sponsor MOOC delivered courses for a school. The sponsorship allows the school to access the material for free, whilst creating a positive link both with the brand and the organisation directly. This sort of innovative interaction between the workplace and education can ensure that both benefit from new innovation and mutual understanding.

2. New content development trends

HTML5 and CSS3 have become bedded in and most modern web based VLE systems have moved towards this. This can cause some issues within some schools, as older browsers don't always support all modern technology standards (including things like AJAX and Javascript libraries). The biggest barrier to business is having to upgrade from Windows XP, as Internet Explorer 8 has a limited feature set, and more modern versions of IE aren't available on XP. We expect that more schools will move to newer Operating systems in the next year, the most likely being Windows 7, as Windows 8.1 still hasn't bedded in yet.

We also expect to see more schools looking at other options like “Chrome for education” to avoid issues upgrading in the future.

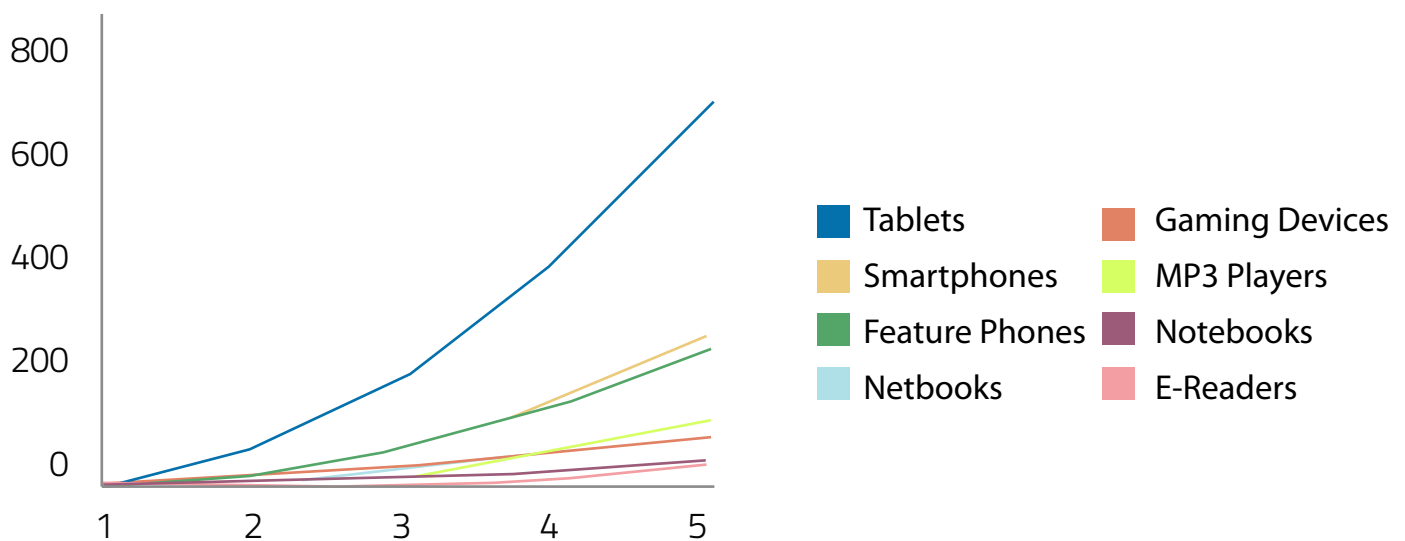
Mobile devices and tablets (and even “phablets” - the half way between stage) are becoming a key way that users digest content, we’ve gathered some information below about the penetration of Tablets and Phones into the market. Whilst we would say that predictions of the death of the desktop are premature, we think that any school VLE that isn’t mobile compatible will be missing out on a key route to engage with their students.

Worldwide Devices Shipments by Segment (Thousands of Units)

Device Type	2012	2013	2014	2017
PC (Desk-Based and Notebook)	341,263	315,229	302,315	271,612
Ultramobile	9,822	23,592	38,687	96,350
Tablet	116,113	197,202	265,731	467,951
Mobile Phone	1,746,176	1,875,774	1,949,722	2,128,871
Total	2,213,373	2,411,796	2,556,455	2,964,783

Source: Gartner (April 2013)

Cumulative Shipments of Mobile Devices in First Five Years



Source: Gartner, IDC, Company Data, Morgan Stanley Research

There is also a greater move towards collaborative and user generated content. Open Source communities and projects like Wikipedia can show how powerful an open group can be. Schools will see users wanting to collaborate, not just within their lessons, but also on how they learn. This can be a key generator of innovation, which can help keep your school performing at a high level. We expect to see more of a focus from schools on tools that allow collaboration, rather than 1 to many tools that would have been popular in the past.

3. Wearing “Open Badges” with pride

The “Open Badges” initiative is gaining traction, with hundreds of organisations including colleges, training providers, technology centres and learning networks now issuing the badges.

Open Badges allow for reward-based learning, with particular badges awarded for achievements such as course completions, MOOC attendance, online examinations and more.

Supported by the MacArthur Foundation, and run by Mozilla, Open Badges aim to provide valid and verifiable evidence of accreditation - more than just an image, the badge is a unique link to information about the bearer, and their specific achievement.

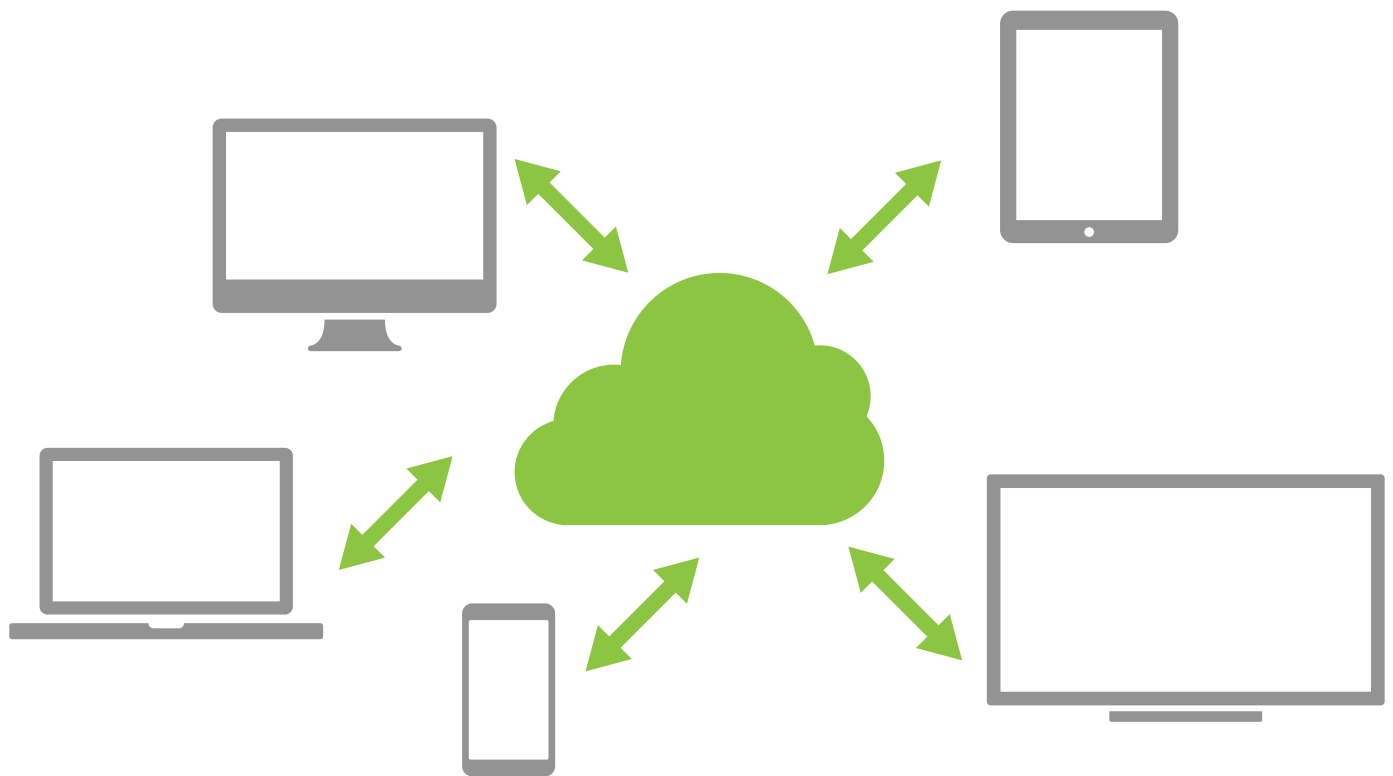
Compared to a certificate or test result, these badges have the potential to communicate much richer information about the relevant course or examination to potential employers, teachers or fellow students.

We expect to see much greater take up of this technology through Q4 into 2014, as more and more awarding bodies recognise the potential of moving credentials from the briefcase to the cloud.



4. Changing demands for blended learning

Blended learning has become more key to the future of schools, students have become more used to getting all of their data via digital devices, everything from updates from their friends, to their mail and the latest news. With blended learning you can ensure that you get the best out of your teachers time, moving some less interactive activities online, and freeing up your teachers to work directly with students on issues they may be having.



Blended learning must now become more embedded into the day to day, being able to quickly go and look up information, or get up to speed on a subject is key. Blended learning has moved from a formal model, like a classroom lesson with online homework, to a more “on demand” method. This is often referred to as “just in time” learning, this ensures that your students can acquire information how and when they need to. Some organisations are also pushing the boundaries of blended learning to accommodate different learning styles. This means students can choose whether they take an in person course, which they follow up online, have an interactive session online, which they reinforce with further reading, or complete most of their learning independently online at their own pace. This is particularly popular at further education institutions, which may have learners who study at evenings or from home.

5. The Flipped Classroom goes global...

A flipped classroom is where students acquire new information independently (for example by being linked to relevant videos or online texts). The interaction of the teacher changes from dealing with “acquisition” to embedding knowledge. When the teacher interacts, whether this is in person or online, they are focussed on reinforcing and enhancing learning which can be a much better use of a teacher’s time.



This has moved globally with the move towards Massive Open Online Courses (MOOCs). These are online courses aimed at thousands of users around the world. New information is presented in document or video format for users to learn from, this is tested by activities like quizzes. Feedback can automatically be given and users directed to more resources if needed. Teachers interact via synchronous (e.g. Webinars, Chat rooms) or asynchronous (e.g. forums, e-mail) methods, which ensures their interaction is targeted. If a student is competently learning, and passing the tests, there isn't any need for teacher interaction, the teacher is then free to focus on students that may be struggling.

6. Responsive e-learning

The increased use of mobile devices has made life a lot harder to design effective learning. Previously if learning was digital you would have all the learners in the same room working on identical computers. Today you will have some learners on PCs, some on Laptops and others on Mobiles or Tablets. You must now ensure that your e-learning is “responsive” - that is that is able to display effectively on a variety of devices.



The first step for this is to ensure that the VLE software you are using is responsive. This will ensure that the software and school branding will display well on phones and tablets, regardless of make or model. The second part of looking at a responsive VLE is the content you are producing. If a teacher produces content that is scaled to their monitor this may not display well on Mobile devices. For example, if content uses a lot of images that are very wide, you can cause mobile users to be forced into scrolling to view them all. Using relative dimensions, or other types of resources that can scale, can go a long way to ensuring your VLE stays responsive.

7. Tin Can API (Experience API)

The Tin Can API (officially known as the Experience API) is a new modern standard to replace SCORM-2004. This standard is designed to allow users to create interactive content - like textbooks, games, simulations and other interactive activities, then track completion and scores in them within their VLE. This standard is still being bedded in, Advanced Distributed Learning (part of the US Department of Defence) control SCORM, and after ten years launched a project to develop a new standard.



We've seen Tin Can move to a much more mature position over the last year, and it is looking more likely that it will be taken up by more VLE systems in the future. A lot of schools are already using SCORM content, but we foresee that there will be a lot of excitement around the newer features of Tin Can, it could also be integrated with Open Badges, leading to a game based achievement system a lot of users will be familiar with from console or PC gaming.

8. Use of videos in learning

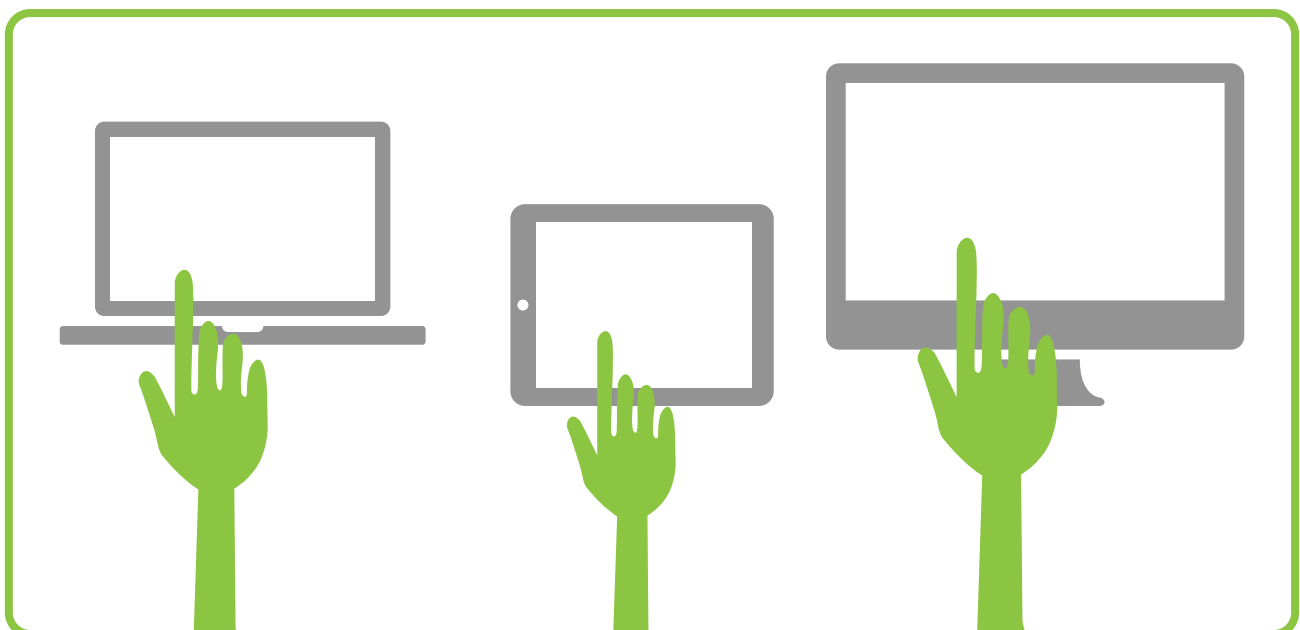
We've seen a much bigger move towards the use of Videos in learning, particularly with distributed students. The recent Moodle MOOC used videos (both live and recorded) as introductions to each topic. Sites like lynda.com have become key players in video based learning and hundreds of contributors are uploading video to YouTube often on educational topics.

In terms of your own school, there are free tools available to make screencasts of activities, and with the plethora of high quality cameras on smartphones, filming video instructions and introductions to courses is getting much simpler. Most modern VLE systems can take video as a form of embedded media, this can make a previously static course much more interactive.

Videos can also be used for learners to demonstrate their learning. In face to face learning it can be common to have learners prepare a presentation to show what they have learnt. With distributed learners this demonstrative learning method can be lost, however you can now get learners to present their learning to camera, and upload it to an VLE for the teachers and other users to review.

9. BYOD

Bring Your Own Device (BYOD) is a concept that has been around as long as personal computers, someone might bring their own laptop into work, so they can use it in a meeting as at work where normally they use a desktop. In recent years it has become much more important, personal phones and tablets now have many of the capabilities previously reserved for a PC.



There can be a number of risks to allowing staff & students to use their own devices, from data protection, to virus infections. Although banning personal devices can be tempting, there are good reasons to allow them. There can be massive costs savings when compared to deploying devices to your school. Equally there isn't an onus of support on your IT department, which there would be if you had purchased devices for the users.

We'd advise that these days every school needs a BYOD policy, particularly so if they're using a mobile compatible VLE system. If a company lacks the expertise in house to devise one, it can make sense to talk to industry experts to get further advice and guidance.

10. Wearable technology

Wearable tech is undoubtedly still in its infancy, but recent product launches such as Google's Glass, Samsung's Galaxy Gear smartwatch, and the Nike+ FuelBand are now advancing this type of technology into the mainstream. Most current devices need to link to a smartphone to have full functionality, and there have been some concerns about battery life and privacy. We would expect incremental innovation from other companies over the next few months (we'd expect to see Apple's iWatch and something Microsoft in short order).



The true disruptive innovation will come when we have an independent device, that has full features without the need for a link (a link may enhance it but would not be needed). Our prediction would be that Google or Apple are most likely to do this first, a Glass Mk 2 looks most probable at this point. The main hindrance at the moment is battery life, no one will want a watch they have to charge up every couple of hours, even once a day may be too much for most people.

About Webanywhere

Since 2003, we've provided website services and e-learning solutions to help schools communicate, collaborate and promote themselves online.

As a provider of websites, learning platforms, design services and e-learning content, we're also recognised by leading organisations. We're an approved supplier to the UK Government Procurement Service, a Moodle partner, a Mahara partner and a Google Apps Authorised Reseller.

For more information on Webanywhere or to get the latest education news, advice and tips via email, please get in touch.

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