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Blurring Lines-Six Key Trends

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Blurring Lines — Six Key Trends

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If you read my article in the September issue of *ATG*, "Content, Services, Solutions and Space, Blurring Lines in the University: Implications for Publishers, Aggregators, Technology Companies and Libraries," then you know I follow six key trends with an eye toward people, businesses and organizations that do the unexpected: blur the lines, if you will.

The six key trends I follow are:

1. Open Access
2. Demand-Driven Acquisition
3. The "Flipped" Library
4. Education Companies Moving from Content to Services
5. Customized Learning Management Systems/Program/Degree Creation
6. Institutional Ownership/Distribution of Educational Content and Services

The lines blur when people, companies and institutions do the unexpected (by most of us) to grow and stretch the products and services they offer. More directly, the lines blur when people and institutions offer a product or service we do not normally associate within their usual scope. For example, when a university funds a start-up to build an adaptive-learning enabled learning management system, the lines blur. Or when a library and a university press merge and introduce a new imprint focused on publishing Open Access eBooks, the lines blur. Or when an aggregator of scholarly content and services introduces an online student tutoring service, the lines blur.

In truth, the lines have always blurred and will always blur, because people and (less often) organizations and institutions are always innovating. But I believe the pace and depth of blurring has accelerated over the past five years or so and, therefore, merits more rigorous scrutiny with an eye toward extrapolating what it might mean for our collective future. What will the library look like in ten years? Will scholarly/reference and learning companies continue to operate in significantly independent and very different business ecosystems? How will universities differentiate themselves as geography becomes less central to their value proposition to incoming students? What place will for-profit universities have as specialized, online and hybrid degree programs become more central to the public university's mission?

In this column I will explore each of the six trends at different times and at different intersection points through the lens of people and companies who are doing not only the unexpected but also what I believe to be predictive/instructive about where we are headed. At this point it will be helpful for the reader, I believe, if I review each of the six trends and how I conceptualize each as space worthy of ongoing scrutiny.

Open Access

Open access in the journal world has boiled down to a debate about publisher business models and the researchers' need to see greater more "open" distribution of his or her ideas. On the book side, Open Access has been much more about a fundamental challenge to the role of the publisher with numerous initiatives aimed at supplanting the role of the publisher. There is much to read and digest about Open Access in both the journal and book world, but I think of Open Access in a much broader sense. In my view, Open Access is really about establishing funding mechanisms that bring well-developed and curated content to the information consumer without restriction on non-commercial use. Scholarly information (for research and for learning) is both a public and a private good, but the production and distribution of the content must be achieved in an economically sustainable manner (whether by for-profit or non-profit organizations). So, it seems to me, the Open Access debate should focus on the search for and introduction of new business models that push our collective thinking about what is possible forward. So while I stay abreast of new developments with massive open online courses (MOOCs), green and gold OA and university-backed efforts to publish Open Access textbooks, I see these efforts as rather mainstream and I am on the hunt for efforts pushing beyond these boundaries already crossed.

Demand-Driven Acquisition

Why isn't every form of media delivered as demand driven? My hunch is we will eventually live in a world where access to all media is metered; much like the usage of electricity. Relative, aggregate demand will influence per unit/per minute pricing and high usage products will fetch higher prices. Analytics will inform the media producer's decisions about delivery and analytics will allow the user (and the mediator of usage in public spaces, i.e., librarians) to allocate time and resources. Packages and perpetual ownership will be a big part of the mix, but the demand-driven side of the cost equation will drive the pricing of packages and perpetual access rather than perpetual ownership pricing models serving as the jumping off point, as they do now. In my view there has been relatively little innovation in demand-driven acquisition with the recent trend being toward pooled or consortia commitments to DDA. Soon though, some product or set of products will break from the pack and unexpected usage/purchase models will emerge that are fundamentally different from what we are currently offered, and I will be sure to feature it in this column.

The "Flipped" Library

I borrowed the term "flipped" from the more common usage of "flipped" classroom; meaning to deliver instruction online and use the classroom time for homework/application. In the context of the library I use the term "flipped" to mean that much research can be performed online and the library must/will serve many more purposes. Of course it is a gathering space and a teaching space, but what more can it be? Is it a publishing space? A commercial space for the distribution and sale of unique intellectual output from the university? What can the library become? I see the university as a singular space and a singular consumer of digital content and services for learning and research. I think the strategic thinkers in the IT department will move closer to the strategic thinkers in the library (at the Provost's urging in some case) and that the library will ultimately become the virtual and physical digital nerve center of the university. This is perhaps the most provocative view I hold about the trends I explore and, therefore, most prone to revision, but I am on the lookout for shifting roles and responsibilities in the university as a whole that shift how the library is viewed in a more expansive context.

Education Companies Moving from Content to Services

2012 and 2013 (so far) have been very tough years for the education companies. The landscape is dominated by **Cengage**, **Pearson**, **McGraw Hill**, and **Wiley** and all four are having a difficult time delivering acceptable financial results. The move from textbook publishing to educational technology and services is a necessary one but it is also a generational one. By this I mean that the gate-keepers for content used in college classrooms, professors, will need to go through a "demographic transition" from a "paper" professoriate to a "digital" professoriate. This will take time and will require a long-term, slow growth strategy that will reward the education companies that make the right bets on the future and that are super effective stewards of capital. I will be keenly watching for bold moves that separate one of the four big companies from the pack. And I will be scanning the environment for spin-offs and start-ups that push the boundaries of educational content and services.

Customized Learning Management Systems/Program/Degree Creation

I believe that online and hybrid education will increasingly become an acceptable alternative for traditional college students recently graduated from high school. Parents and
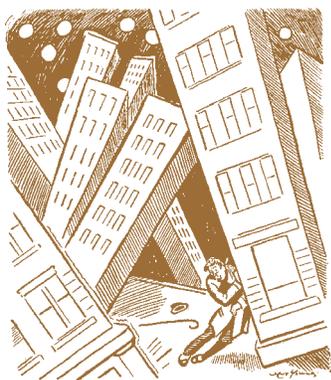
students will choose these programs because of unique specialization in program offerings that give the student exactly what they are after in an education and because it will be a cost-effective decision. Online education will put pressure on the "geographic value" of a school and enrollment will gravitate toward programs offering unique value. We will have fewer physical campuses over time and the distinction between for-profit and traditional universities will blur as both seek to offer distinctive programs of study and value. This strategic shift in the administration and direction of higher education institutions will dramatically influence the direction of companies that create learning management systems and build online courses and online degree programs. Of the six trends I follow, this is the one most active currently in terms of start-up, entrepreneurial activity.

Institutional Ownership/Distribution of Educational Content and Services

The prevailing business model for learning content is mediated by the professor and paid for by the student. Individual choice about content used in the university classroom for teaching reigns supreme. Yet many MBA programs and executive education programs include the materials in tuition. And a number of companies have emerged that focus on working with administration to centralize delivery and purchase of educational content through learning management systems; again, embedding costs in tuition. In the for-profit space it is not uncommon to see system-wide adoptions of educational content, controlled by a single course coordinator. Centralized decision-making is at the heart of standardized content and centralized purchasing in the K-12 market. It is unlikely and even undesirable that university instructors should cede control of their educational content decisions to a centralized source. But there are endless possibilities as to how this content can be paid for. Increasingly, the library is becoming home to educational content that is perpetually owned and distributed digitally to students without usage restriction. And numerous universities have created content for a variety of purposes; among them the need to own content that can be used in new educational formats such as MOOCs. As the transition from print to digital unfolds (slowly) in university education, I am certain we will witness innovations in packaging, pricing and distribution of educational content that lead to more forms of university-owned and distributed content and I will bring these new models to light in my column.

Innovation and change is all around us, regardless of the professional context in which we work and learn. But educational and scholarly content and services seem particularly ripe for change given that we are surrounded by especially thoughtful people and we work in a space significantly impacted by public funding in an era of budgetary restraint. In this column I will bring you the stories of innovators through the lens of the six trends I detailed above. Send me an email or give me a call if you spot a trend I should follow and/or if you know a person or an organization I should profile. 🌿

Moving back to the **Charleston Conference** and our planners, **Albert Joy** (Univ. of Vermont) tells me this is his last **Charleston Conference**. He is retiring! But maybe **Julie Arnheim** (see her letter to the editor, this issue) will be able to talk him into being a mentor?

Somebody else who is abandoning the *Against the Grain* ship is **Bob** "the wonderful" **Nardini**. **Bob** says that he is "out of gas." He will be at the Conference. Let's talk him into doing something else.

Something else new that we are trying this year is a "Pecha-Ku-cha-like" interlude (6 minutes, 40 seconds) before a Plenary session. In the spirit of "anything worth doing is worth doing superficially," **John Dove** will have a presentation on the theme of this year's conference. **John** presented his first "pecha-kucha-like" inspired presentation at the **13th Fiesole Collection Development Retreat** in St. Petersburg, Russia in May of 2011. Ever since the **Charleston Conference** has included "Shotgun" sessions (6-minute-40-second presentations) and there are several scheduled throughout the **2013 Charleston Conference**.