Dear ELIG Member,

We are pleased to present the ELIG Annual report 2010/2011. It covers the period between the AGM 2010 and the AGM 2011.

As ELIG Member, you are receiving regular communication via our channels such as newsletters, personal mail announcements, through the ELIG Members Forum or the LinkedIn group and many of you are members of an ELIG working group.

However, we are also aware of your time constraints as senior business executive. So from this year onwards we have established this ELIG Annual Report as your quick reference and condensed overview of the ELIG initiatives and activities.

Overall 2010/11 has been an active and productive year for ELIG, with major initiatives undertaken and plans now well established for ongoing developments. These demonstrate ELIG’s continuing commitment to its mission: to provide policy input at a European level and as appropriate at country/region level; to act as a communication channel to the marketplace, representing the position of the industry; to ensure a platform for cooperation, sharing and concerted action for its members and to maintaining a pragmatic thought leadership through leveraging the ‘collective intelligence’ of the ELIG membership.

We remain at your full disposal for providing details or answering your questions on any of the activities mentioned in this report. We thank you for your contribution to our joint endeavour and strongly encourage you to continue taking an active part in the shaping of our industry and its environment in the future.

Yours sincerely

Richard Straub
Secretary General
ELIG

Elmar Husmann
Deputy Secretary General
ELIG
Executive Committee

For the period 2011 to 2013, ELIG has established an expanded Executive Committee following the two-year renewal process.

Three new members were appointed: Fadi A. Kahlek (McGraw-Hill), Rolf Granow (OnCampus) and Martti Raevera (Aalto University). Fabrizio Cardinali (eXact Learning Solutions) was re-elected to the ELIG Chair for a third term. And Paul Hunter (IMD) was appointed as Vice-Chair.

Chair: Fabrizio Cardinali, VP Global Business Development, eXact learning solutions
Vice-Chair: Paul Hunter, Director of Corporate Learning Network, IMD
Eric Baber, Innovations Director, Cambridge University Press
Peter R. Hamilton, Director Performance Learning Solutions, Intel
Rolf Granow, Managing Director, OnCampus GmbH
Diem Ho, Manager of University Relations EMEA, IBM
Richard Horton, Senior Director of Education Strategy, Blackboard
Fadi A. Khalek, VP Educational Services, McGraw Hill
Martti Raevaara, VP Academic Affairs (Education), Aalto University
Sabine Schumann, Vice Managing Director, p.a.u. Education

Membership Updates

ELIG also welcomes two new member organizations:

Young Digital Planet is one of the worlds leading educational e-content publishers and e-learning technology providers. It has been in operation for 20 years as an educational eContent publisher and eLearning technology provider. In that time Young Digital Planet has pioneered new technologies to develop educational solutions for a wide range of international customers including ministries of education and leading publishers around the world. They also offer a range of consulting services within the field of digital publishing including integration, consultancy, project management and training.

FernUniversität in Hagen is the only state university in the German-speaking language community that offers quality-assured, supervised distance teaching with up-to-date Bachelor’s and Master’s programmes, PhD degrees, as well as numerous Certificate and Open Access courses. Established in 1974 as a university of the State of North-Rhine Westphalia, FernUniversität was one of the first to go online with teaching, supervision of students as well as administration, thus breaking completely new ground. Since FernUniversität offers a real alternative to on-campus studies with high-quality degree programmes, the institution also stands for the trend towards Lifelong Learning. With over 74,000 students enrolled (winter 2010), FernUniversität is currently the largest university in Germany.
Advisory Board

In this period, ELIG has further established the interaction with the Advisory Board now composed of 14 senior experts and thought leaders (see the list in the attachment to this report).

The key areas the Advisory Board has contributed on in this reporting period were:
- Thematic planning for ELIG workshops at the Online Educa Berlin 2010
- Reviewing the objectives of the ELIG Working Groups
- Reviewing approaches to gaining funded research
- Providing feedback on the structure and content of the open education survey
- Giving a critical appraisal of early versions of the Learning Industry Framework
- Supporting the planning for the 2011 ELIG Annual Meeting

ELIG Secretariat

Secretary General  Richard Straub
Deputy Secretary General  Elmar Husmann
Programme Director  Matty Smith
Senior Advisor  Lin Squires

Matty Smith will be retiring from both ELIG and all learning technology related activity at the end of 2011 to follow other interests.

A new member of the ELIG Secretariat will be announced during the last quarter 2011.

Annual General Meeting 2010

„Bridging the Gap” hosted by Cambridge University Publishing

The Annual ELIG Meeting in the historic Pitt Building in Cambridge was attended by over 50 delegates.

Keynote speeches were provided by:
- Mike Morris: Head, Education Sales Business Development & Solutions, European Markets, CISCO
- Andras Szucs: Secretary General, European Distance and eLearning Network (EDEN)
- Laura Overton: MD, Towards Maturity
- Fabrizio Cardinali: CEO, eXact Learning

Debate topics included the impact of the current economic climate on the learning market and changes in the demands for learning – e.g. towards greater emphasis on workplace integration and competence development.

Complementary to this, ELIG members and guests discussed technological trends such as the growing importance of new mobile devices (iPad) and the mobile Internet.
Large parts of the meeting had a strong interactive character with lively roundtable discussions including topics as:

- Traditional, diverse and open educational resources. Led by James Perham-Marchant, (Senior Director, McGraw-Hill)
- The perception and the reality of eLearning. Led by Piers Lea (CEO, LINE Communications)

At the Networking Dinner, Stephen Bourne, CEO Cambridge University Press, provided insights into their strategy for digital content, new devices and services.

The second day included a panel debate on learning research and innovation with guest speakers from the EU Projects MATURE (workplace integrated learning & knowledge maturation), TARGET (serious gaming) and openSE/ED (open education).

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**Annual General Meeting 2011**

„Sustainable markets for learning in Europe: Moving from hype to reality“

**ELIG AGM 2011 hosted by Aalto University**

In the planning for the 2011 AGM, it was decided to build on the conclusion of the 2010 AGM discussion and further concentrate on distilling long-term trends in the learning market and their impact on the future of this industry.

A particular emphasis will be given to the user perspective with several invited speeches and outside views:

- Anne Morisson, Director BBC Academy
- Dirk Burkamp, Learning Technology Head, PwC
- Teemu Leinonen, Prof. on New Media Design and Learning Aalto University
- Kalevi Ekman, Director Aalto Design Factory
- Riitta Vanska, Senior Manager of Mobile and Learning Solutions, NOKIA
- Martin Dougiamas, Founder of the Moodle Open Source Learning Platform (video contribution)
- Liina Munari, European Commission
- Markku Markkula, Member European Committee of Regions, Rapporteur on the Digital Agenda, Advisor to the President Aalto University
Public Policy

Public Policy has always been a focal topic for ELIG. In particular, the Public Policy Group (PPG) has once again, in the past year, facilitated interaction and debate with European institutions such as the European Commission, the European Committee of Regions, the European Social and Economic Committee and the European Parliament.

Important ELIG Public Policy Activities in this period:

The Innovation Union Agenda

- **Member States Workshop on the Innovation Union Agenda**
  - organised by the European Commission (DG Research). Representatives from Member states, the European Commission, industry and academia discussed the rising global competition for talent, together with the dependency on educational excellence and better collaboration with industry. ELIG Deputy Secretary General Elmar Husmann was a panel member. Research, Science and Innovation Commissioner Máire Geoghegan Quinn joined in the later part of the workshop and an informal meeting with her could be arranged.

- **Knowledge Alliances Seminar**
  - organised by the European Commission (DG Education and Culture). Outputs from the seminar – with ELIG contributions - have been fed into the overall Innovation Union Agenda

New Skills for new Jobs

- **The Future Internet and its impact on e-Skills & European Exchange Mechanisms for e-Skills**
  - ELIG was invited as expert to these workshops organized by the European Commission (DG Enterprise) in the context of their eSkills Initiative.

The Digital Agenda

- **Digital Economy Workshop**
  - organised by the European-American Business Council. A panel, moderated by US Ambassador Philip Verveer and including ELIG’s Deputy Secretary General, Elmar Husmann, debated market trends and the need for political cooperation between the EU and US. A specific emphasis was on the growing importance of cloud computing.

- **Committee of Regions Hearing on the Digital Agenda**
  - ELIG has contributed a position paper on the role of regions in the Digital Agenda with a particular focus on learning and innovation.
The Digital Agenda Assembly – ELIG Secretary General Richard Straub was a panel member in the session on Mainstreaming e-Learning in Education and Training. ELIG was further active in the session on Local Digital Agendas that was moderated by ELIG Public Policy Group Member Markku Markkula (Member of the European Committee of Regions and Advisor to the Aalto University President).

The PARADISO 2011 Conference – Internet & Society - New Innovation Paths – ELIG provided a welcome message to this conference that was co-organized by the Club of Rome. The conference included high-level EC representatives such as Digital Agenda Commissioner Neelie Kroes and DG INFSO Director General Robert Madelin. In the conference, a Reference Document was officially presented to the European Commission - produced by an international expert group. ELIG was a member of this group – via Deputy Secretary General Elmar Husmann.

ELIG a member of the European Internet Foundation – The EIF is an organization of members of the European Parliament. They conduct debates between different stakeholders on Internet policy issues.

Marketplace

In discussions with the ELIG membership it became clear that there was a substantial awareness of the many social, technological and commercial drivers of change on the horizon in the learning industry. Therefore this topic was established with a dedicated ELIG working group - the Marketplace WG.

Dynamics such as Web 2.0, cloud computing and mobility have caused profound shifts in the global marketplace. Key social and behavioural changes in consumers and corporations also drove change in the learning industry. Members were seeking to understand just how these big ‘environmental’ changes had already impacted the marketplace and what they meant for the learning industry. Activities in this period were:

The Learning Industry in Europe – A summary for 2011

The ELIG marketplace group has produced an in–depth analysis of the learning market, of value chains and of strength, weaknesses, opportunities and threats.

Contributors to this report were:

- Group Chair: Peter Hamilton, Intel
- Moderator: Lin Squires, ELIG
- Laura Overton, Towards Maturity
- Wim van Borm, Ignition
- Deniz Saral, Webster University
- Lutz Michel, D-ELAN & MMB
- Theo Hug, The Institute for Psychosocial Intervention and Communications Research
- Sarah Wills, ICWE
- Andras Szucs – EDEN
- Piers Lea – Lin Communication
Innovation & Research

Innovation is a primary strategic concern for any industrial organisation that is competing in the learning market. The early strategic investment into the learning services and technologies of the future is vital for our industry. In addition to traditional in-house innovation, open innovation approaches have turned out to be increasingly important. This includes pre-commercial collaboration in wider innovation initiatives, new forms of public private partnership or large-scale piloting with users.

The ELIG Innovation and Research Working Group is addressing, in contrast to the Marketplace Working Group, a more advanced time horizon of 3 to 5 years ahead of commercialisation and aims at connecting ELIG members with leading European open innovation initiatives on learning.

Activities in this period were:

- **ELIG consulted by the European Commission on defining FP7 Call 8 – Technology Enhanced Learning**
- **openSE Project**: ELIG conducts a large survey among the Learning Industry on Open Education Trends and Perspectives – results are documented in an ELIG White Paper
- **openED 2.0 Project**: ELIG supports open education programme of management development jointly with the United Nations University
- **ELIG joined forces with the European Foundation for Management Development (EFMD) to deliver webinar series on workplace learning** - ELIG supported EFMD to deliver their latest ‘Futures Series’ Webinars. Targeting workplace learning, this series provides access to expert and peer-led sessions centred on future opportunities and challenges for organisations looking to exploit a wider armoury of solutions for employee development.
- **VISIR Project selected for funding** – VISIR is a European Network of organizations to foster innovation in learning including ELIG, EFQUEL and EFMD. The project will start in November 2011.

The ELIG Innovation & Research WG maintains further relations to the following EU research projects:

- **TARGET** (serious gaming)
- **MATURE** (workplace integrated learning, knowledge maturing)
- **MIRROR** (reflective learning at work)
- **TEL-MAP** (roadmapping for technology enhanced learning)
Online Educa Berlin 2010

ELIG not only delivered a Pre-Conference Workshop and a full Panel Session during the 2010 ONLINE EDUCA BERLIN event, but 18 ELIG members exhibited there as well.

The ELIG Pre-Conference Workshop - The European Digital Education Agenda – was organized by the ELIG Public Policy Group and chaired by Elmar Husmann. **ELIG has assembled in two panels a diverse group of experts:**

- **Josh Bersin**, Bersin & Associates
- **Tina Dörffer**, Bertelsmann Foundation
- **André Richier**, European Commission – DG Enterprise
- **Marco Marsella**, European Commission – DG Infso
- **Fabrizio Cardinali**, eXact Learning
- **Nikitas Kastis**, Menon Network

In the ELIG Panel Session: Balancing Individual and Organizational Learning chaired by Richard Straub, the nature of new knowledge worker skills and how organizations could provide the most effective training approaches was debated. **Panelists were:**

- **Josh Bersin**, Bersin & Associates
- **Martti Raevaara**, Aalto University
- **Paul Hunter**, IMD
- **Carin Martell**, eXact Learning

**Richard Straub** also joined in the controversial Online Educa Debate: This House believes that the public sector has failed to use ICTs effectively in education and training.
ELIG Reports & White Papers

- The Learning Industry in Europe – A summary for 2011
  ELIG 2011, with support from Analyst Firms: Towards Maturity, Outsell, Learning Light, MMB Institute
- Open Education: A wake-up call for the learning industry?
  ELIG 2011

Learning Events

On a regular basis, ELIG is able to offer its members access to learning events at privileged rates.

Over the past 12 months these have included:

- e-Learning Excellence in the Middle East Conference, Dubai
- Online Educa Berlin
- e-Learning Africa
- EXPOLINGUA Berlin
- EFMD Futures Series on Workplace Learning - the webinar series offered to ELIG members for free.
- ECTEL 2011 Conference, in Paloma, Italy on 20 - 23 September
- The UK’s OU Institute of Educational Technology ‚Digital & Educational Technology Research Showcase’

ELIG Advisory Board

Michael Auer. Head of the Center of Competence (CoC) Online Laboratories at Carinthia University of Applied Sciences.
Roberto Carneiro. Dean, Institute for Distance Learning, Portugal
Jim Herbolich. Director of Networked Services, EFMD.
Theo Hug. Professor of Educational Sciences at the University of Innsbruck and coordinator of the Innsbruck Media Studies Research Group.
Charles Jennings. Director of Duntroon Associates
Nikitas Kastis. Director, Lambrakis Foundation and President, MENON Network.
Lutz P. Michel. Chairman of D-ELAN, Owner & MD, MMB Institute for Media and Competence Research
Laura Overton. Founder & Managing Director, Towards Maturity
Deniz Saral. Professor and Department Chair of Business & Management Programs, Webster University.
Rebecca Stromeyer. Founder & Managing Director, ICWE GmbH.
Andras Szucs. Secretary General, European Distance and e-Learning Network (EDEN)
Wim Veen. Professor Learning Systems, TU Delft
David Worlock. Advisor and Program Co-chair, Outsell Executive Programmes.
## ELIG Members

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