



January 2004
(Happy New Year!)

Scenarios for the Future of E-Learning

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January 2004

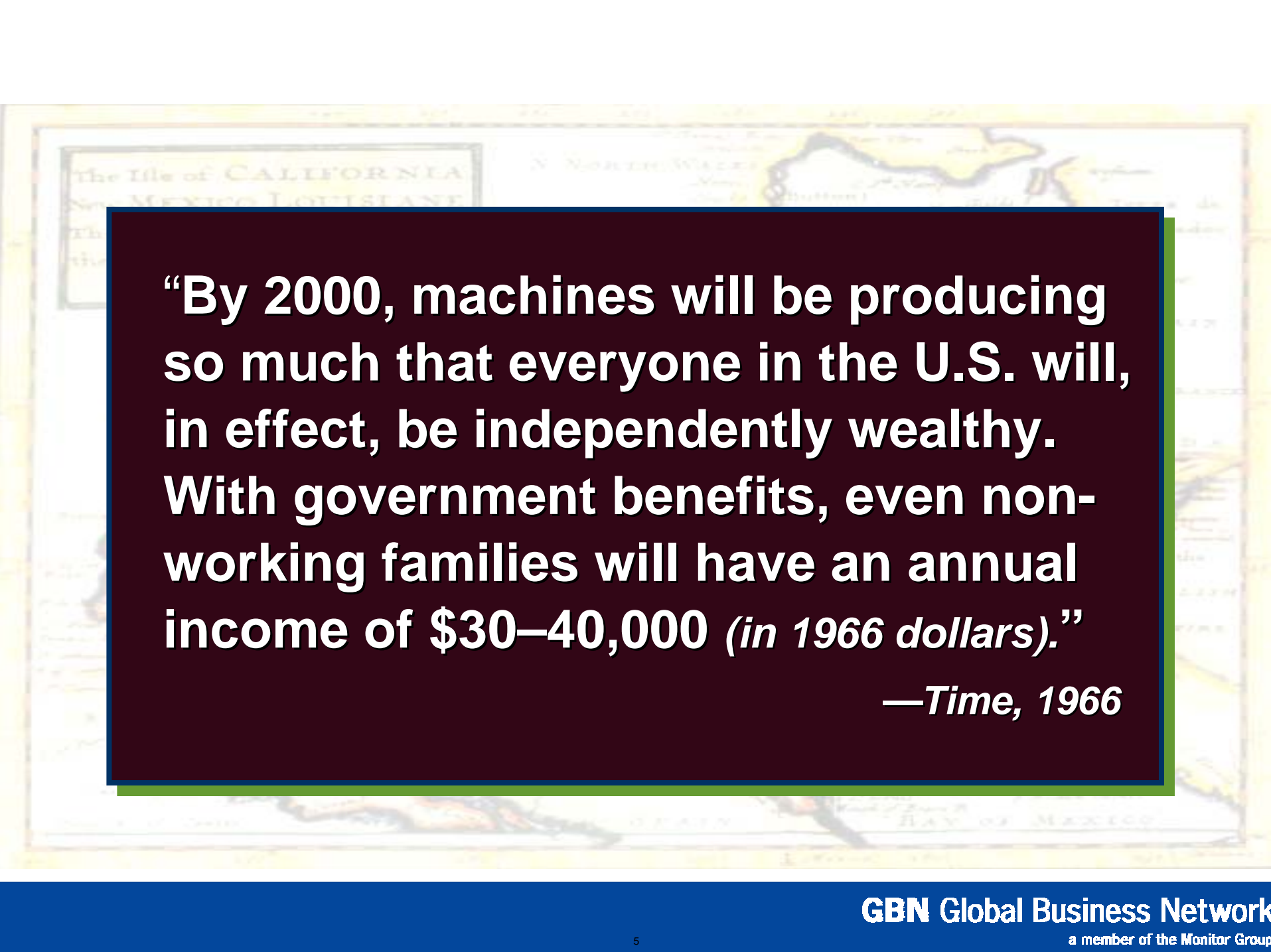
The Isle of CALIFORNIA
 New MEXICO LOUISIANE
 The River MISISSIPI and
 the Lakes of CANADA.
Norman Woll Facit.



The Illusion of Certainty....

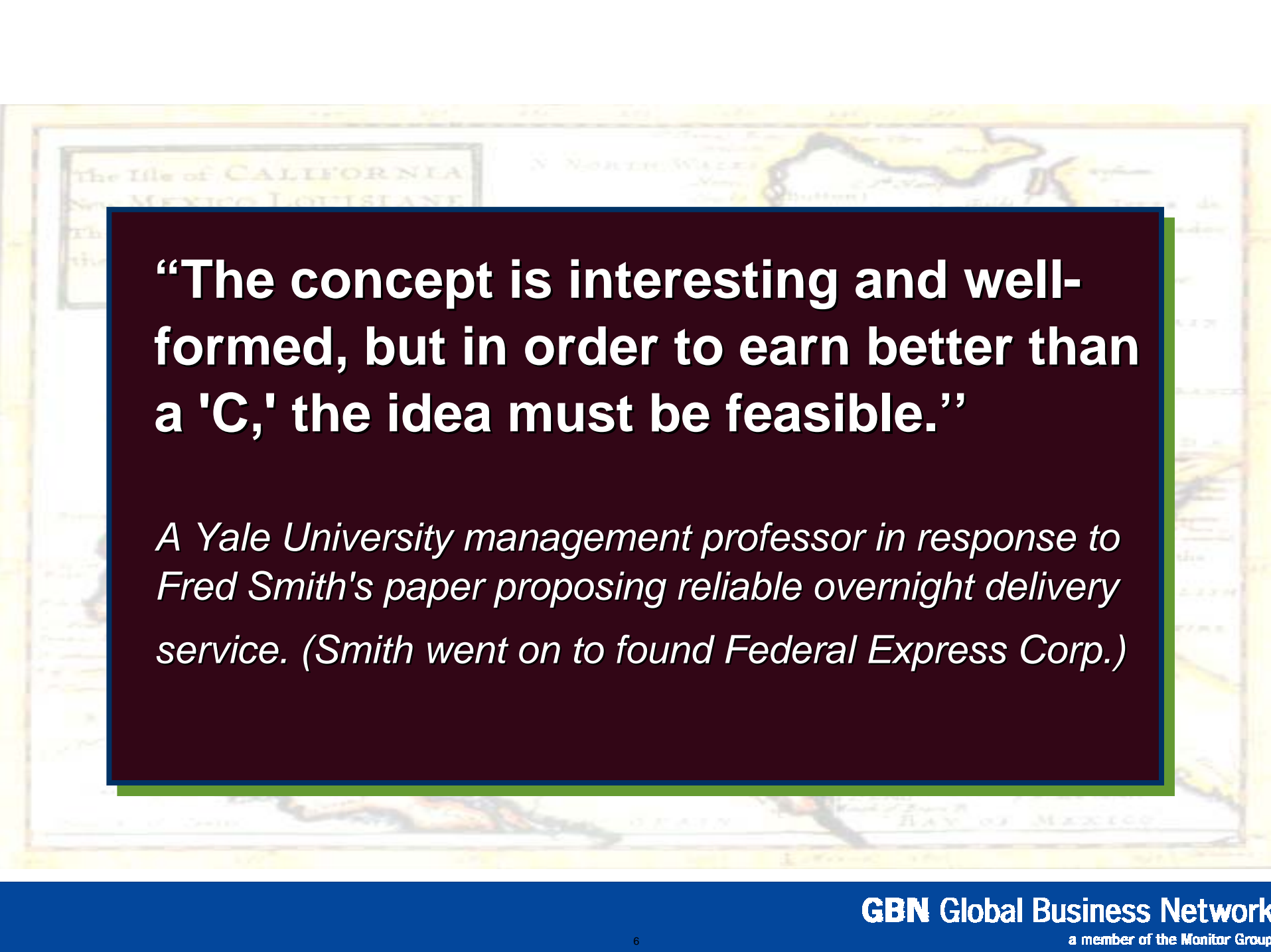
“I think that there is a world market for maybe five computers”

- *Thomas Watson, Chairman of IBM, 1943*



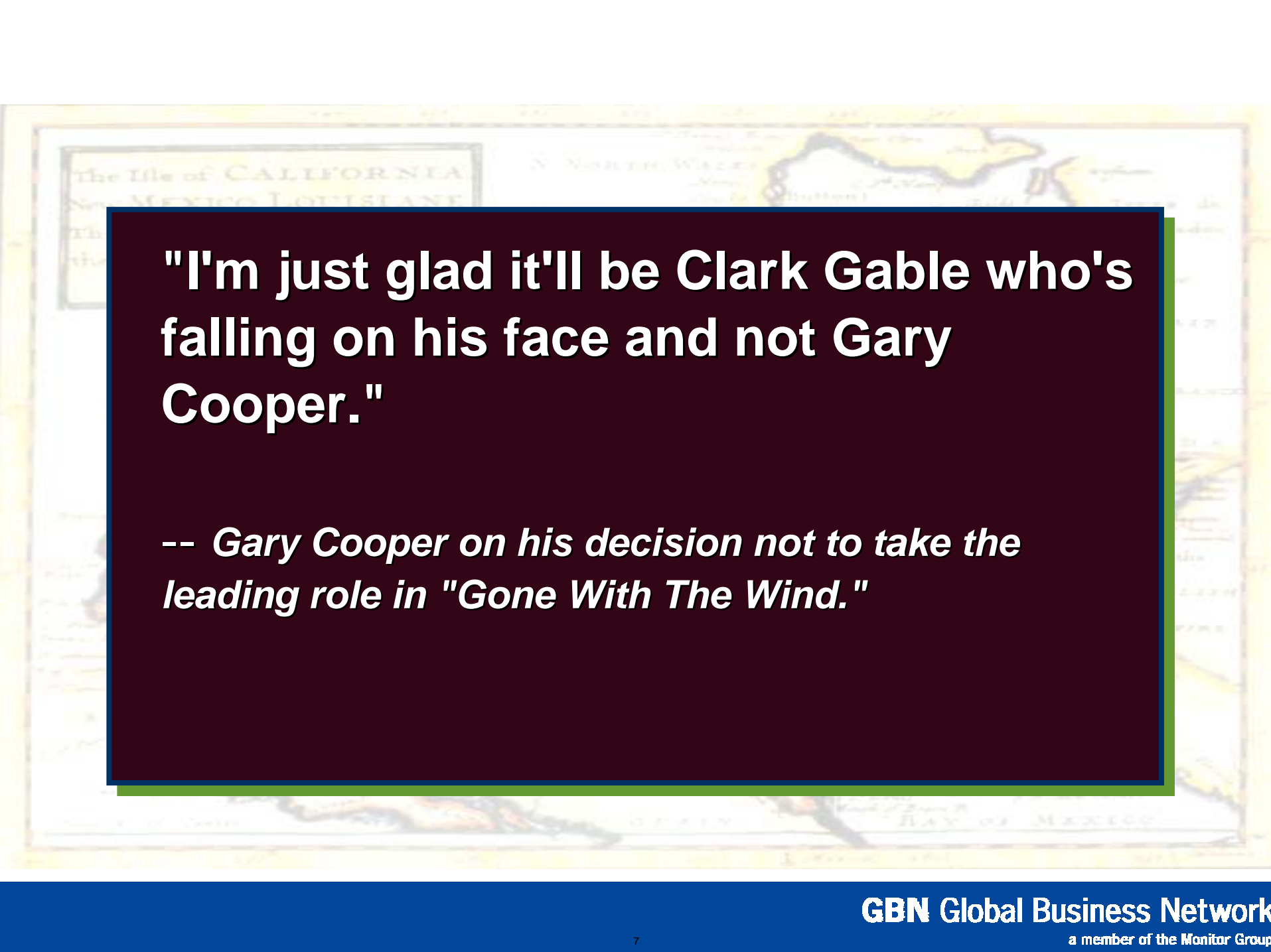
“By 2000, machines will be producing so much that everyone in the U.S. will, in effect, be independently wealthy. With government benefits, even non-working families will have an annual income of \$30–40,000 (*in 1966 dollars*).”

—*Time*, 1966

A historical map of California, titled "The Title of CALIFORNIA" and "MEXICO LOUISIANA". The map shows the state's outline in yellow, with surrounding regions and the Gulf of Mexico labeled. The map is framed by a yellow border.

“The concept is interesting and well-formed, but in order to earn better than a 'C,' the idea must be feasible.”

A Yale University management professor in response to Fred Smith's paper proposing reliable overnight delivery service. (Smith went on to found Federal Express Corp.)



"I'm just glad it'll be Clark Gable who's falling on his face and not Gary Cooper."

-- Gary Cooper on his decision not to take the leading role in "Gone With The Wind."

Why Scenarios?

"Time and time again, we discover that the signals were there all along - we just didn't recognize them until it was too late."

Wayne Burkan



According to a research at Cambridge University, it doesn't matter in what order the letters in a word are, the only important thing is that the first and last letter be at the right place. The rest can be a total mess and you can still read it without problem.

This is because the human mind does not read every letter by itself, but the word as a whole.

Amazing huh?

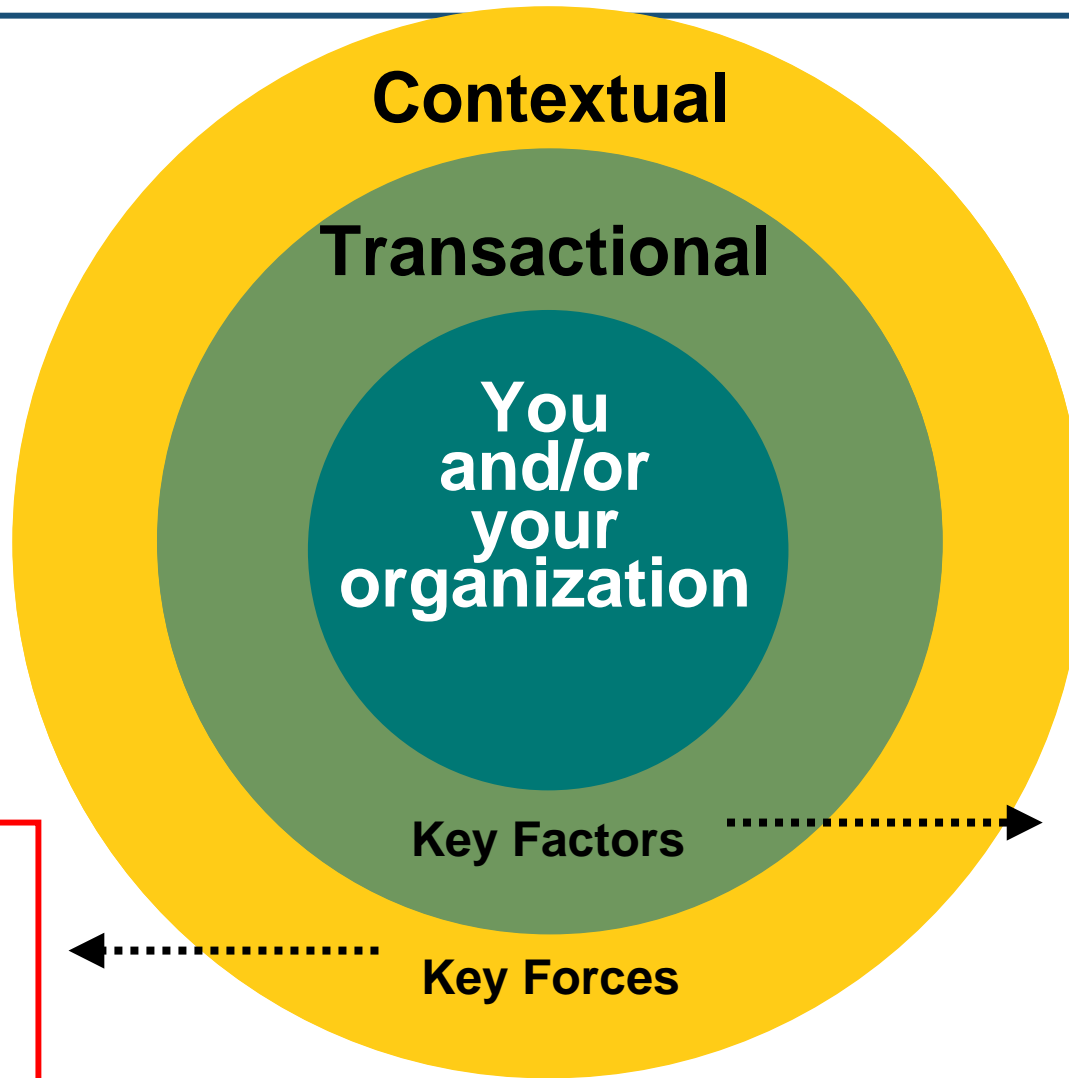
Why Scenarios?



“The real voyage of discovery consists not in seeking new lands, but in seeing with new eyes.”

Marcel Proust

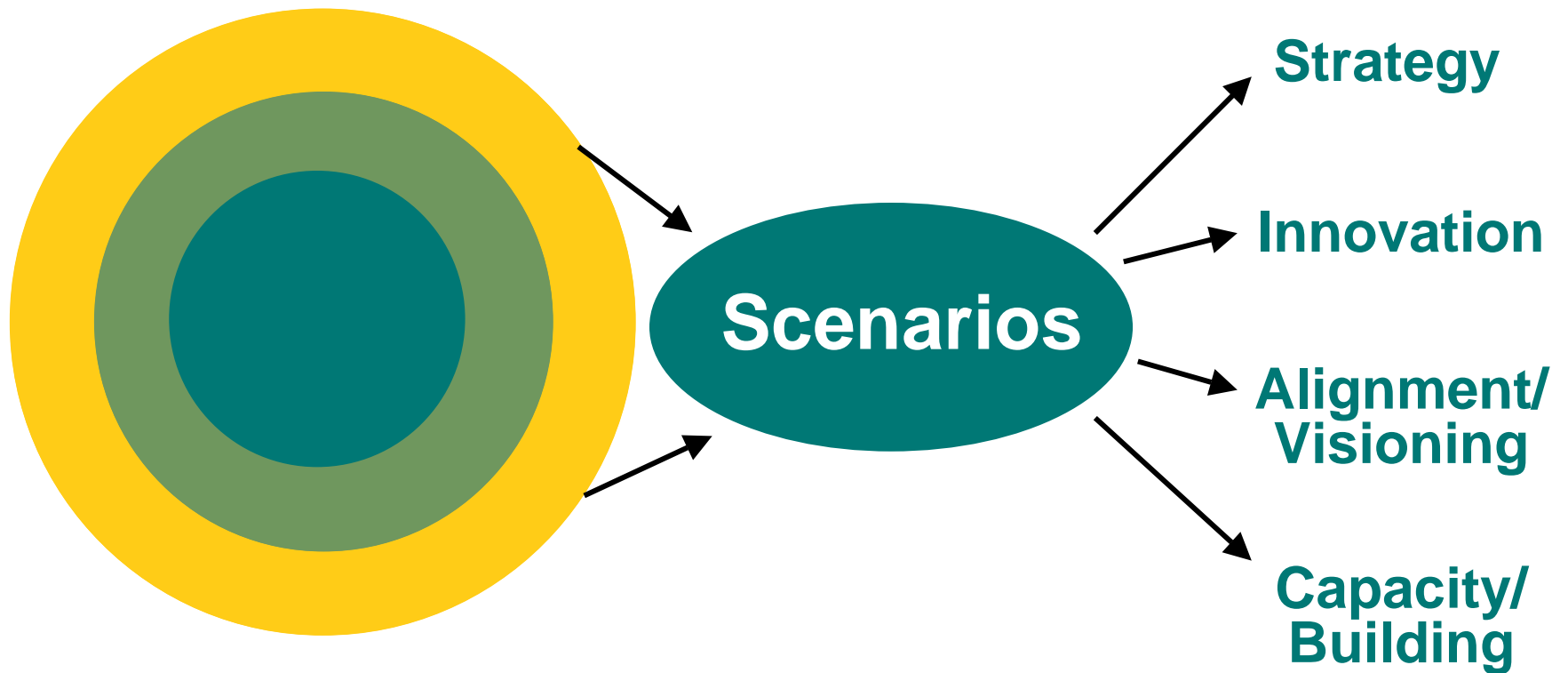
It helps to think from the Outside-In



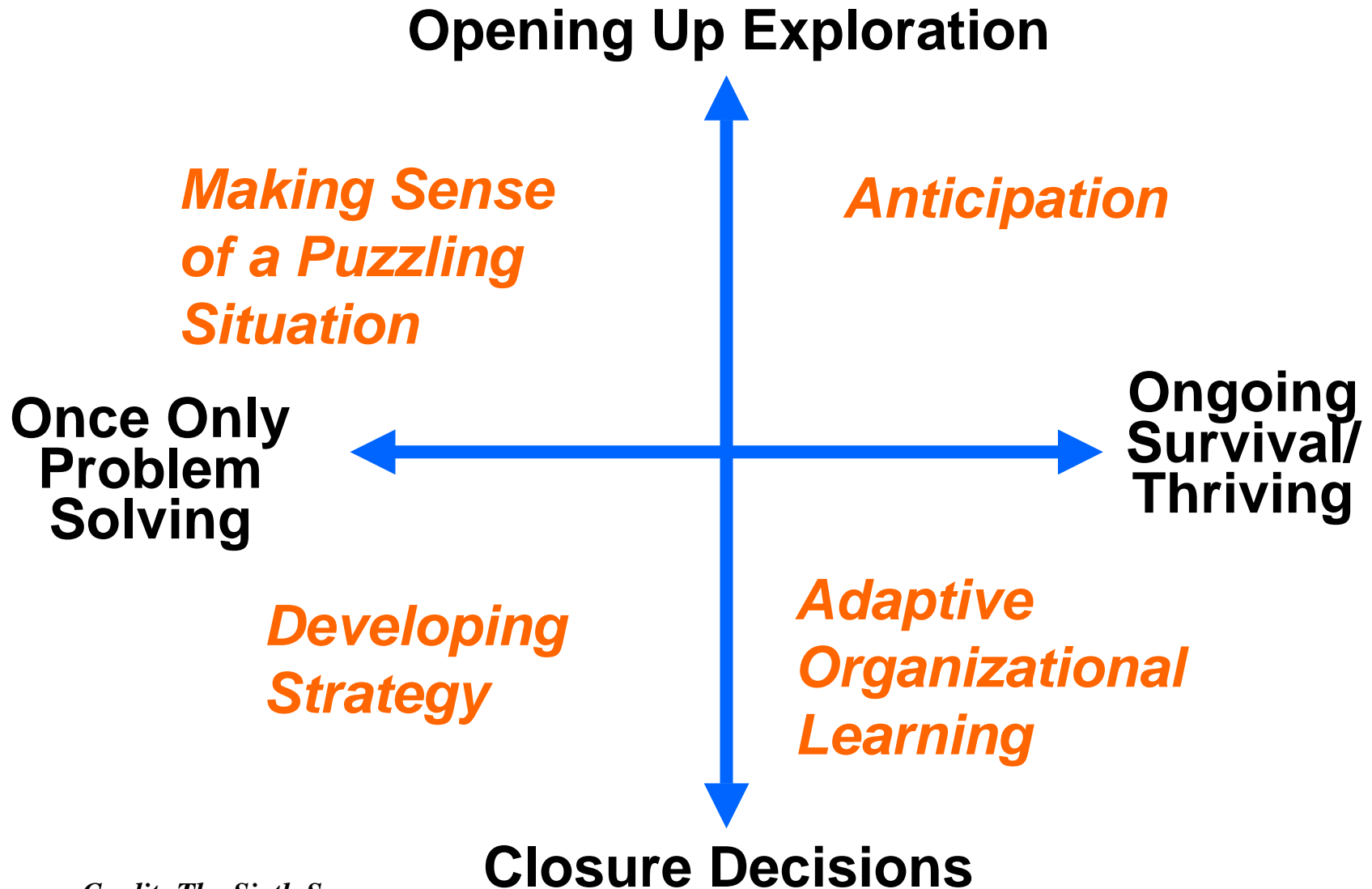
Social
Technological
Economic
Environmental
Political

Constituencies
Customers
Communities
Competitors
Partners

Different uses of scenarios



Different Purposes for Scenarios



Credit: The Sixth Sense

Scenarios are not Forecasts

Scenarios

- **Designed to focus on uncertainties**
- **Clarify risks**
- **Logical pictures of the future**
- **Encourage flexibility and responsiveness**

Forecasts

- **Designed to reinforce certainty**
- **Conceal risks**
- **Single-point linear projections**
- **Foster inertia**

Scenario Issue

What might the future hold for e-learning over the next decade?



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Interviews with Industry Experts

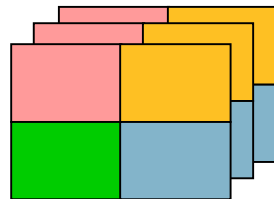
16 interviews with a panel of international e-learning observers from UK, Australia, and US

Scenario Creation Workshop

Group of e-learning practitioners in Scotland
 Exploring the big uncertainties facing e-learning
 Creating different scenarios for e-learning

Scenario Validation and Development

Scenarios shared with panel of international observers, practitioners and learners



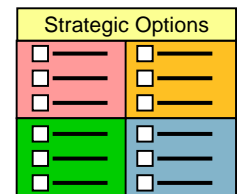
Presentation and Discussion at eLearninternational

Refined scenarios presented at February 2004 Conference

Discussion groups focused on the implications of the scenarios for learners, education, business and government

Ongoing Strategic Conversations

Discussions and policy insights that flow from the scenario analysis



Interview Questions

What has **surprised you** in the field of e-learning in the past 5 years?

What are the **biggest uncertainties** that e-learning faces in the next 10 years?

What must happen if e-learning is to **“succeed”** in the next decade?

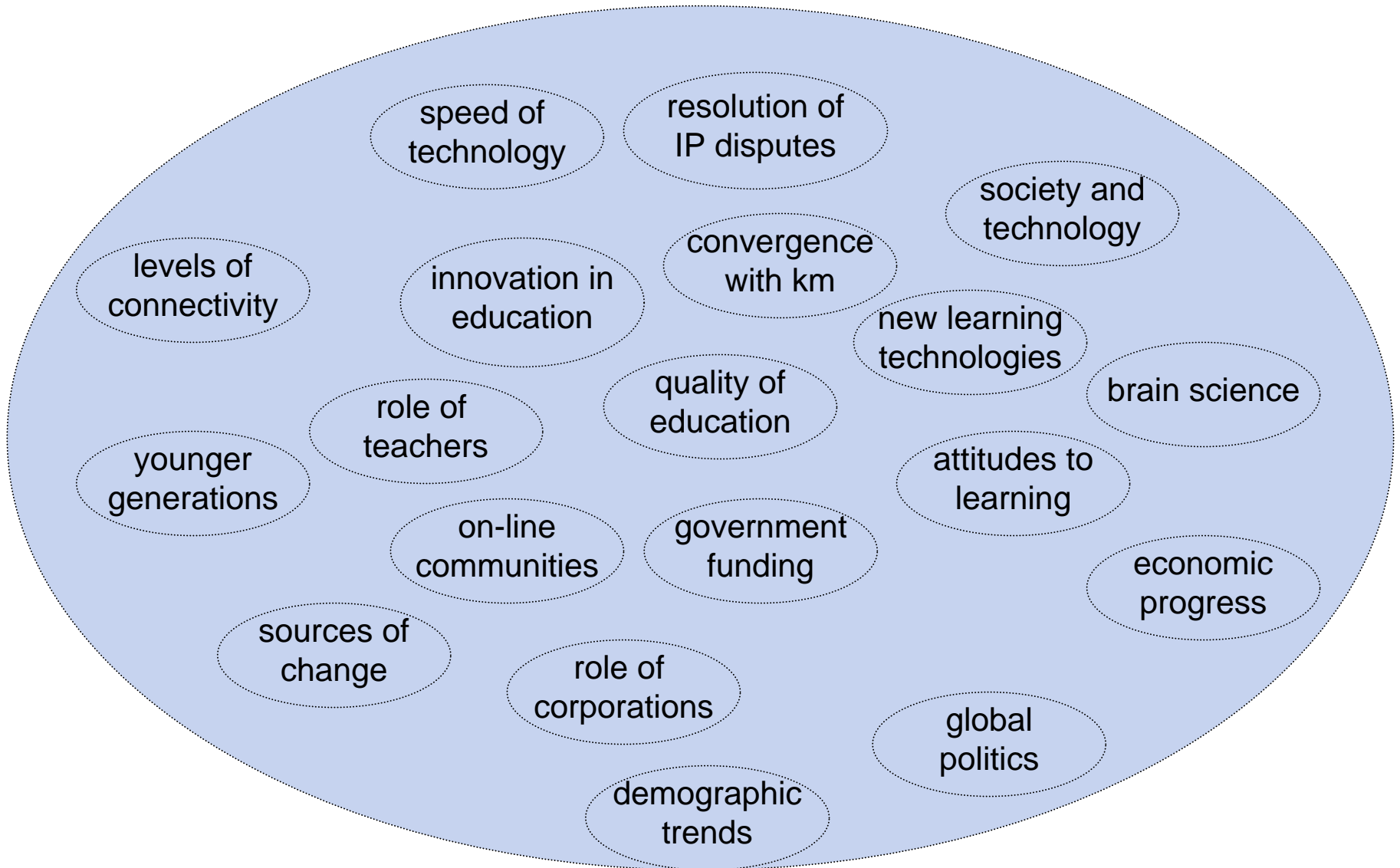
What must happen if e-learning is to **“fail”** in the next decade?

What must the e-learning industry **learn (and forget)** from its past experience?

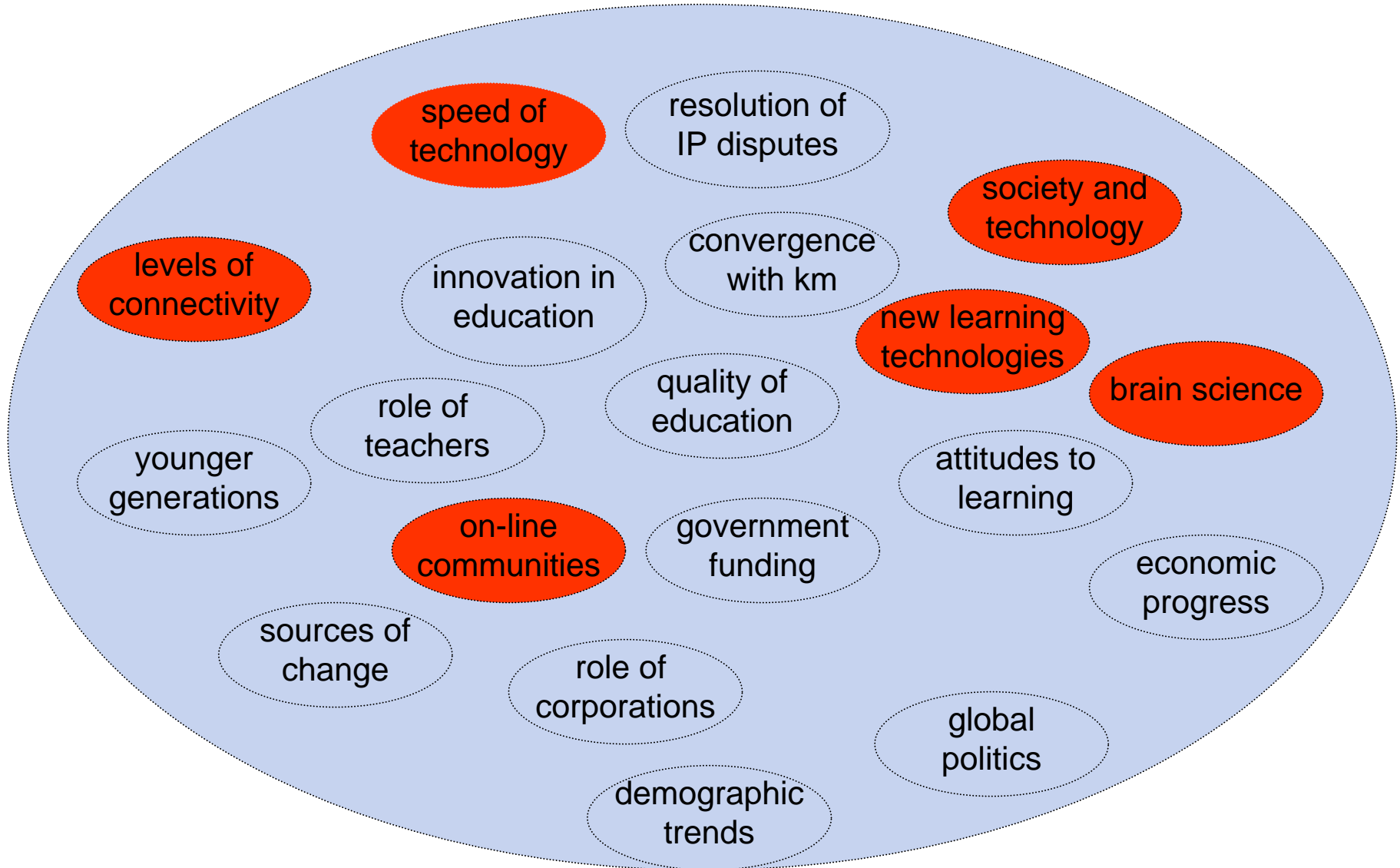
What are the key issues on the **immediate horizon** for e-learning?

What are the **barriers** to a successful future?

The future of e-learning: some interview themes



The future of e-learning: technology and society



Acceptance and adoption of technology in society

Underpinning this uncertainty are the following questions:

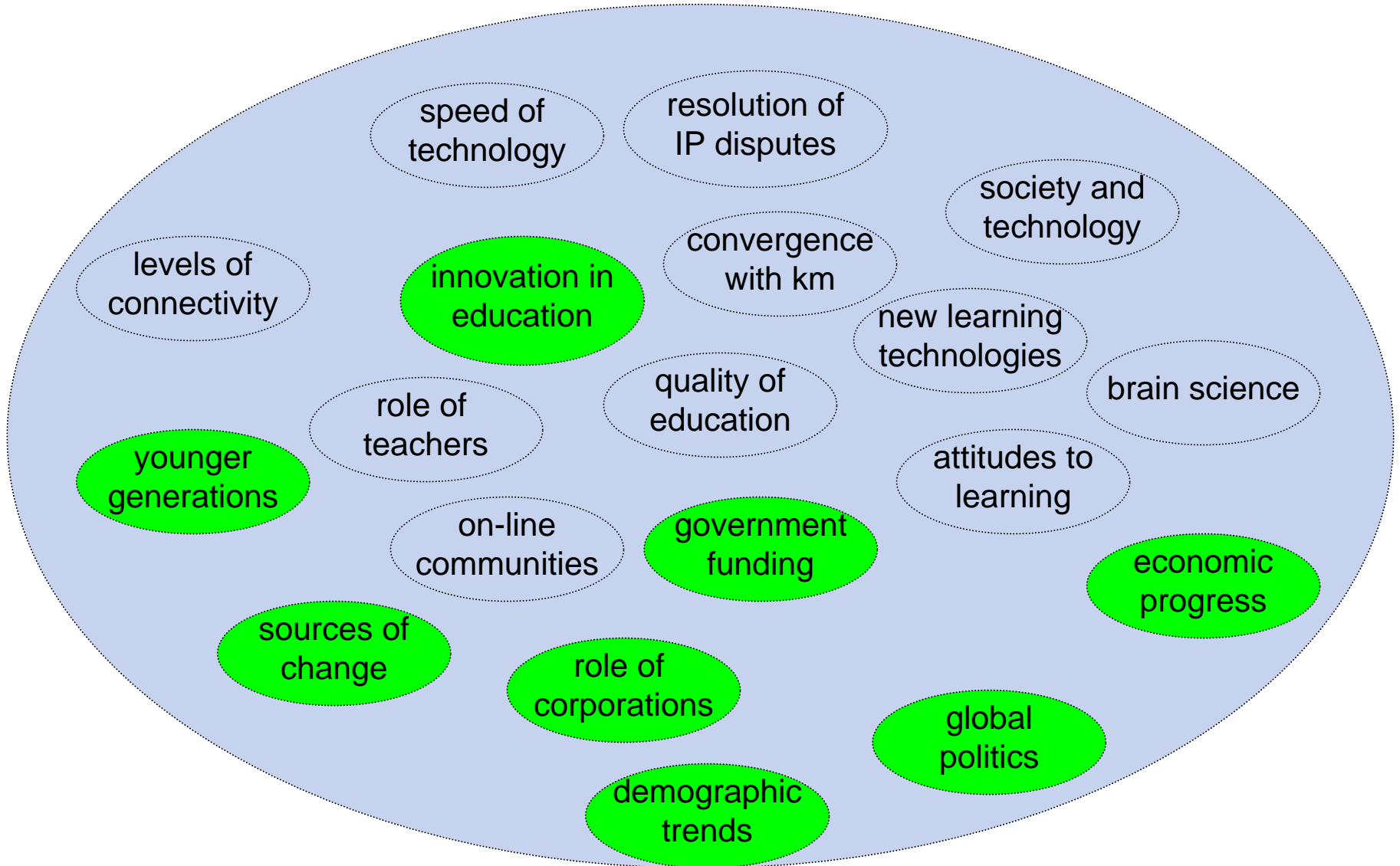
How fast will technology advance in the next decade?

Will we experience real breakthroughs in our understanding of how we learn, possibly through further research into the brain?

Will technology allow for greater interaction and connectivity?

Will scientific and technological progress move in a direction that is mostly comfortable - aligned with fundamental human needs, or will it accelerate in a way that seems discomfoting - running counter to many of our deepest requirements and behaviors?

The future of e-learning: balance of power



Sources of power, influence and new ideas

Underpinning this uncertainty are the following questions:

Who has control over, and mediates access to, learning?

Who is learning for? The individual or the institution?

Who creates new content that enables learning to happen?

How influential will new players and new countries be in changing the global landscape of e-learning?

To what extent will attitudes, motivations and learning styles change as the environment changes?

Critical Uncertainties



Acceptance and adoption of technology in society

High acceptance
Widespread adoption
Technology enables
Aligns with human needs

Partial acceptance
Patchy adoption
Technology frustrates
Runs counter to needs

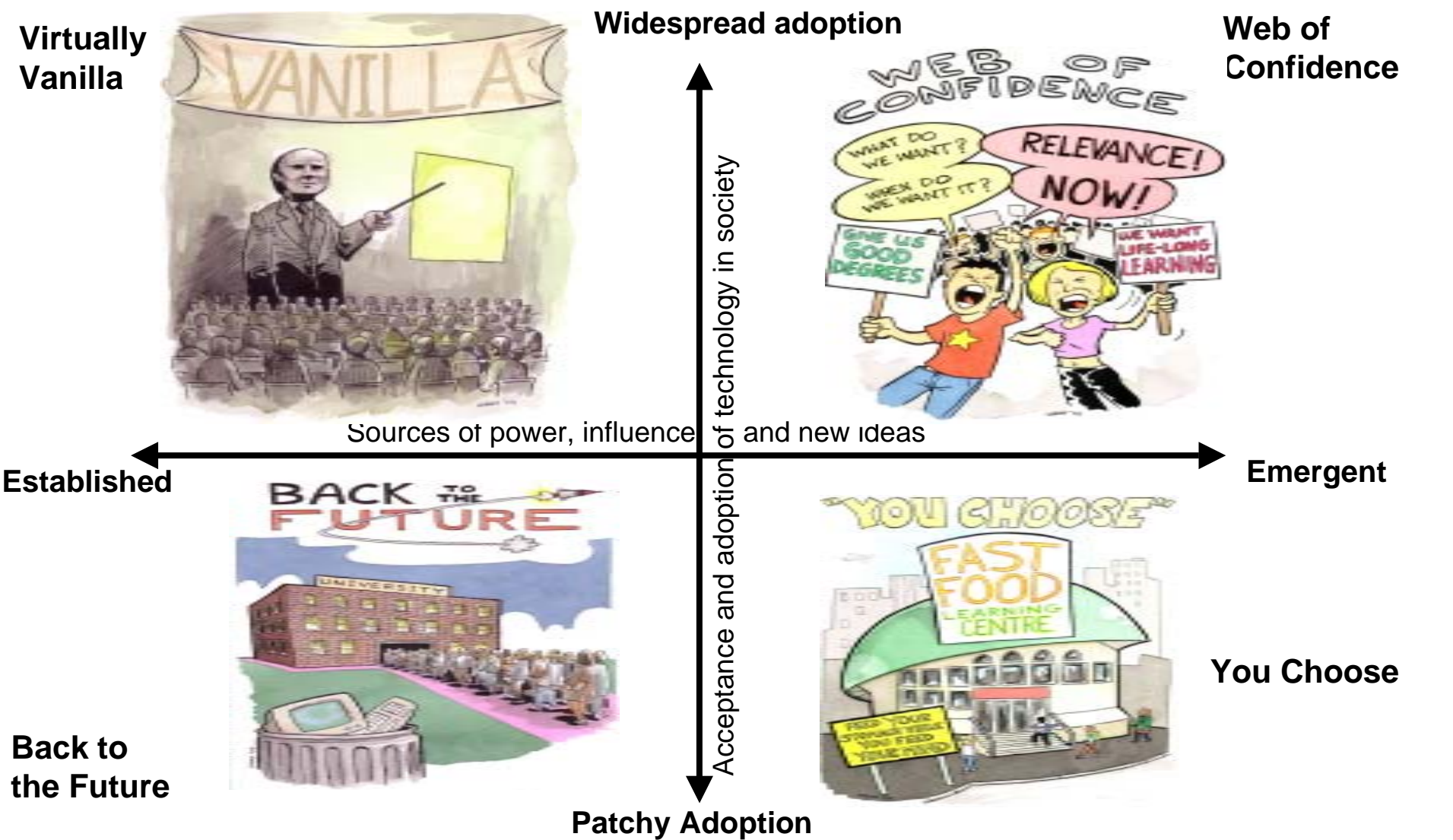


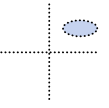
Sources of power, influence and new ideas

Conventional
Institutionalized
Centralized
Established

Unconventional
Self-organized
Decentralized
Emergent

Combining the uncertainties gives us the following matrix...





Transformations in society follow the innovations of the previous decade

Technology allows for creative, individual learning experiences

Fundamental challenges to established education and training policies

Games and simulations provide inspiration for new learning models

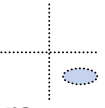
Technology-enabled on-line communities thrive

Most exciting developments in developing nations

Scenarios: Summary

You Choose

Technology adopted patchily , power shifts to emergent players



Mistrust of rich world political and corporate leaders

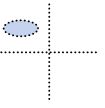
Frustration about traditional models of education

Responsibility for learning becomes decentralized

Widespread use of technology constrained by public fear

Greater desire for local control

Remaining, but limited role for technology in learning



Technology progress and productivity gains

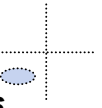
Enhanced connectivity, rich content and more interaction

Powerful institutions set common standards and protocols

A few influential players maintain control over most suppliers and learners

On-line learning pursued as the most efficient form of corporate training

“Constrained personalization” of the learning experience



Insecure global economy caused by terrorism fears, organized crime, levels of debt

Shocks hit hard on emerging nations, who are dependent on globalization

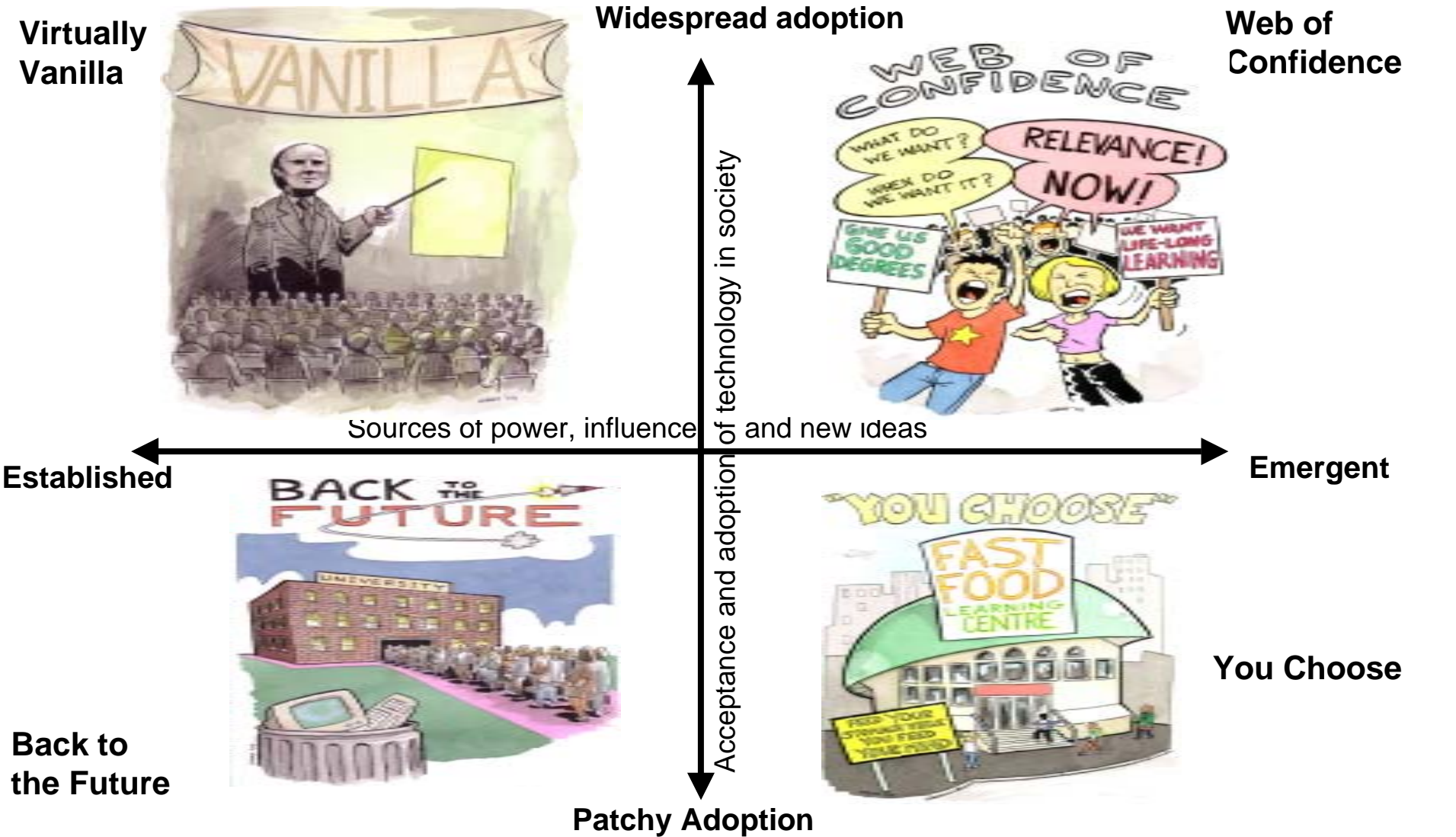
People look to rich world governments and large corporations to provide security

Pushback on many aspects of globalization, especially immigration and connectivity

Far less innovation: more traditional approaches to education in society

Learning experiences become more controlled, predictable and evaluated

Scenario Matrix



Observations from outside the industry

An industry in a whirlwind of transition; substantial and fragmented. Where are we in the evolution of this industry?

Technology and organizational changes are asking fundamental questions of existing structures, approaches and assumptions. Will the interface of technology and education really create something different this time?

Scenarios are useful in teaching humility: the fastest-growing, and largest markets for learning will be in Asia, Africa, South America. What models will they create?

Most of the rhetoric, attention and activity of observers is focused somewhere between Virtually Vanilla and Web of Confidence. This exercise could be a useful reality check on what is possible in the next decade

For each scenario:

What's happening today that is evidence that this scenario will unfold?

If this scenario is happening:

- **what might be some of the “headlines” we read in 2008?**
- **What will the e-learning forum be talking about?**
- **what will players in the e-learning industry need to do differently?**

Using the Scenarios for Conversation

These are very brief scenario summaries. They are meant to provoke further thinking about the possible causes and consequences of these worlds.

- Are each of the 4 worlds plausible, knowing what we know today?
- Are any of these scenarios the “official future” for the e-learning industry? Are they expecting one to occur? Are they hoping that one occurs?
- What would be the consequences of each of these scenarios? How would the industry - in all its various forms - need to change? Is it possible for them to change? Are they geared up for it?
- Do these scenarios challenge any fundamental assumptions that players in the industry are making at the moment?

These scenarios can be used to frame questions for any organization involved in e-learning. For example...

- Who are your most effective competitors in each scenario? What are they doing? How could you learn from them?
- What will your customers be looking for in each scenario? How can you best meet their needs?
- What sorts of people would be most successful in each scenario?
- What alliances would be most rewarding for your organization?
- What innovations and investments would be needed to succeed in this scenario?

“Scenarios are stories. They are works of art, rather than scientific analyses. The reliability of (their content) is less important than the types of conversations and decisions they spark.”

—Arie de Geus, The Living Company

Scenarios for the Future of E-Learning

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E-learning Scenario Matrix

