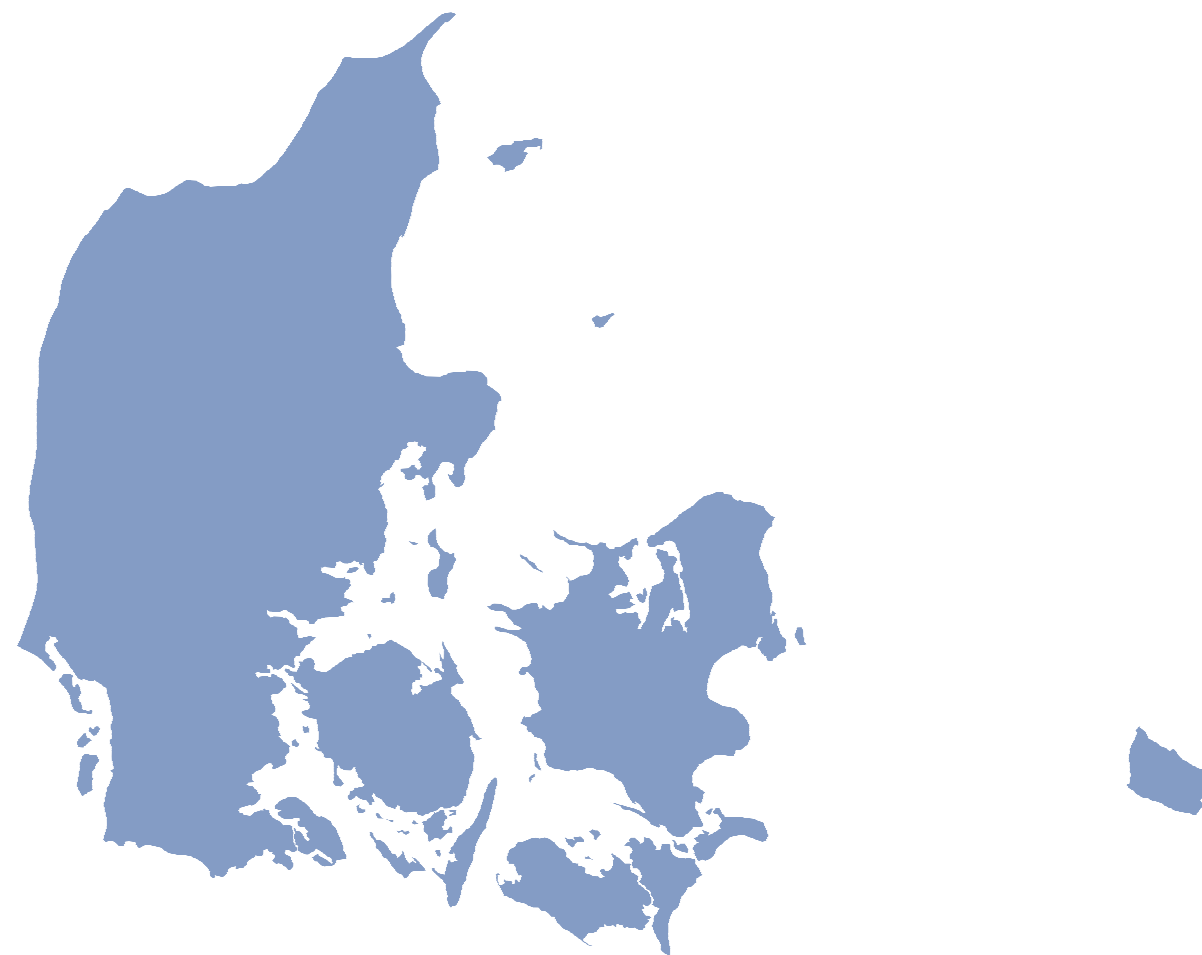


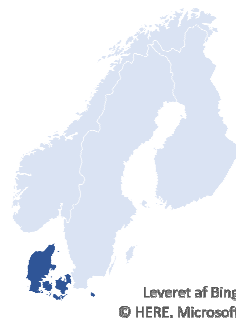
Country presentations

Market situation in the Nordics



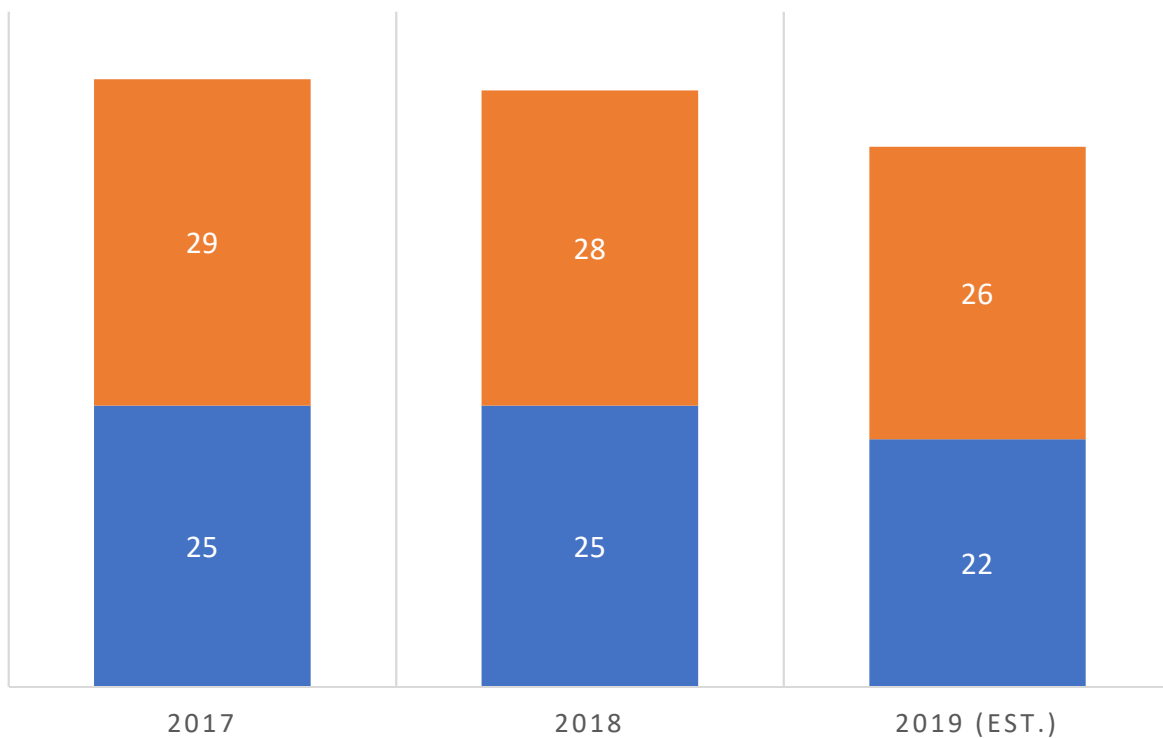


Market trends - I



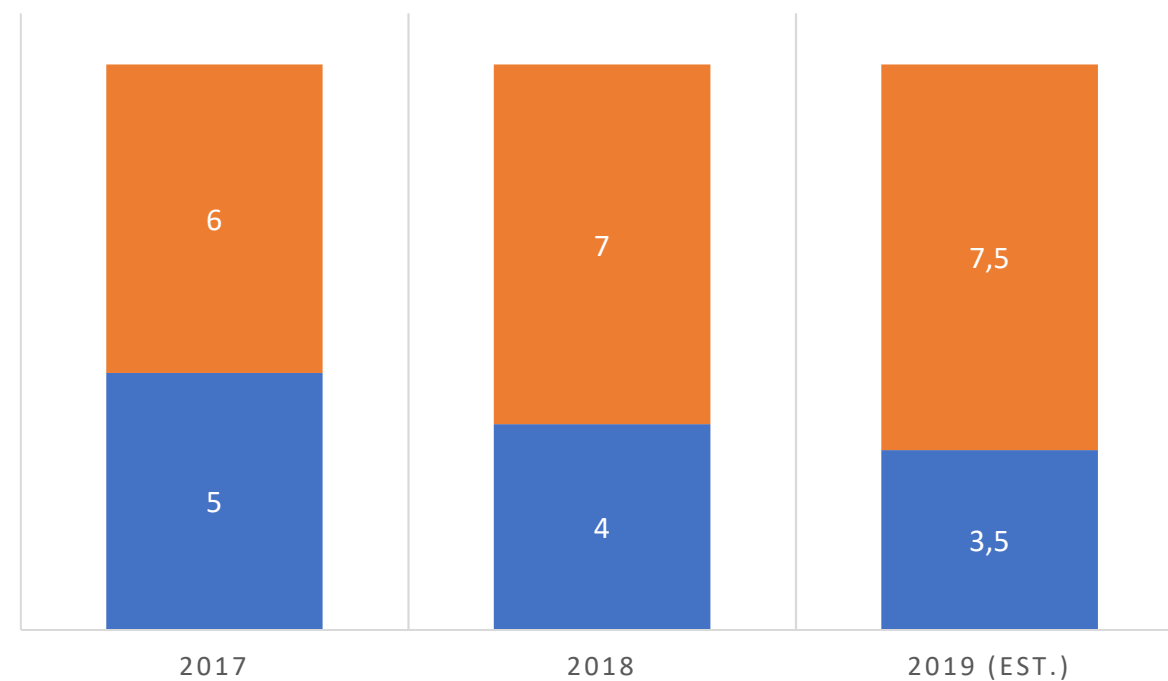
PRIMARY SCHOOL - MARKET VALUE (M€)

■ Analogue ■ Digital

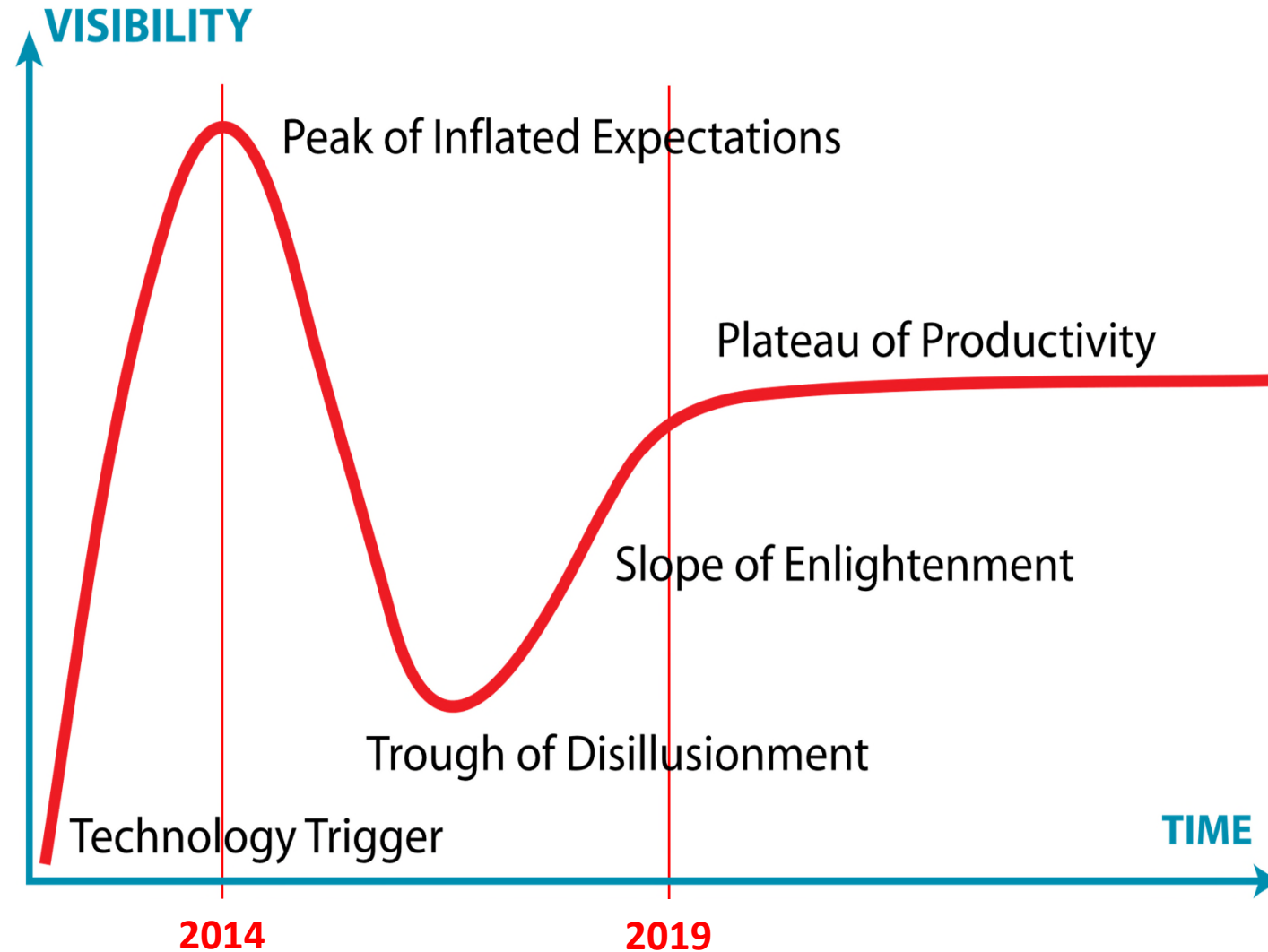


UPPER SECONDARY SCHOOL MARKET VALUE (M€)

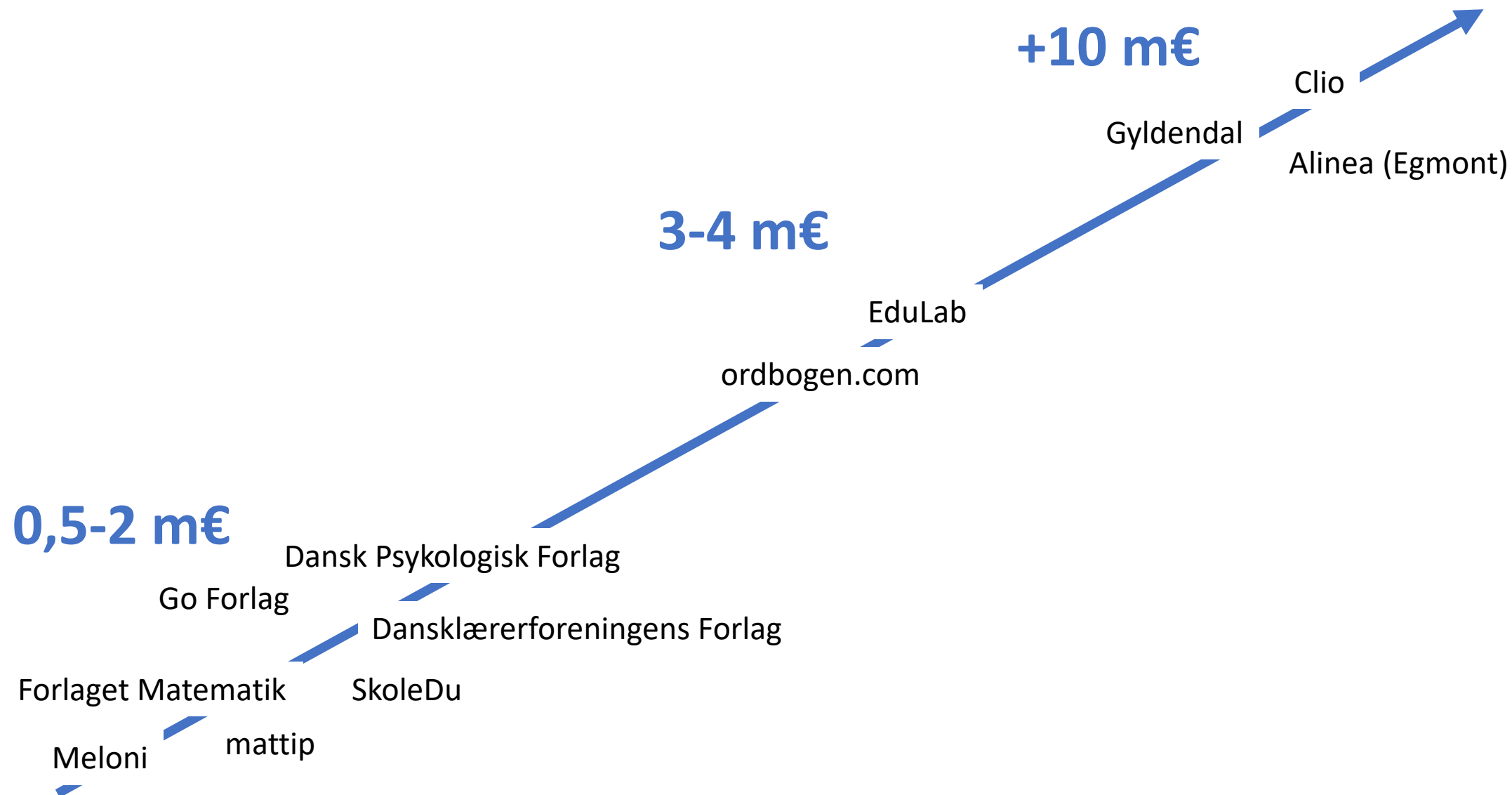
■ Analogue ■ Digital



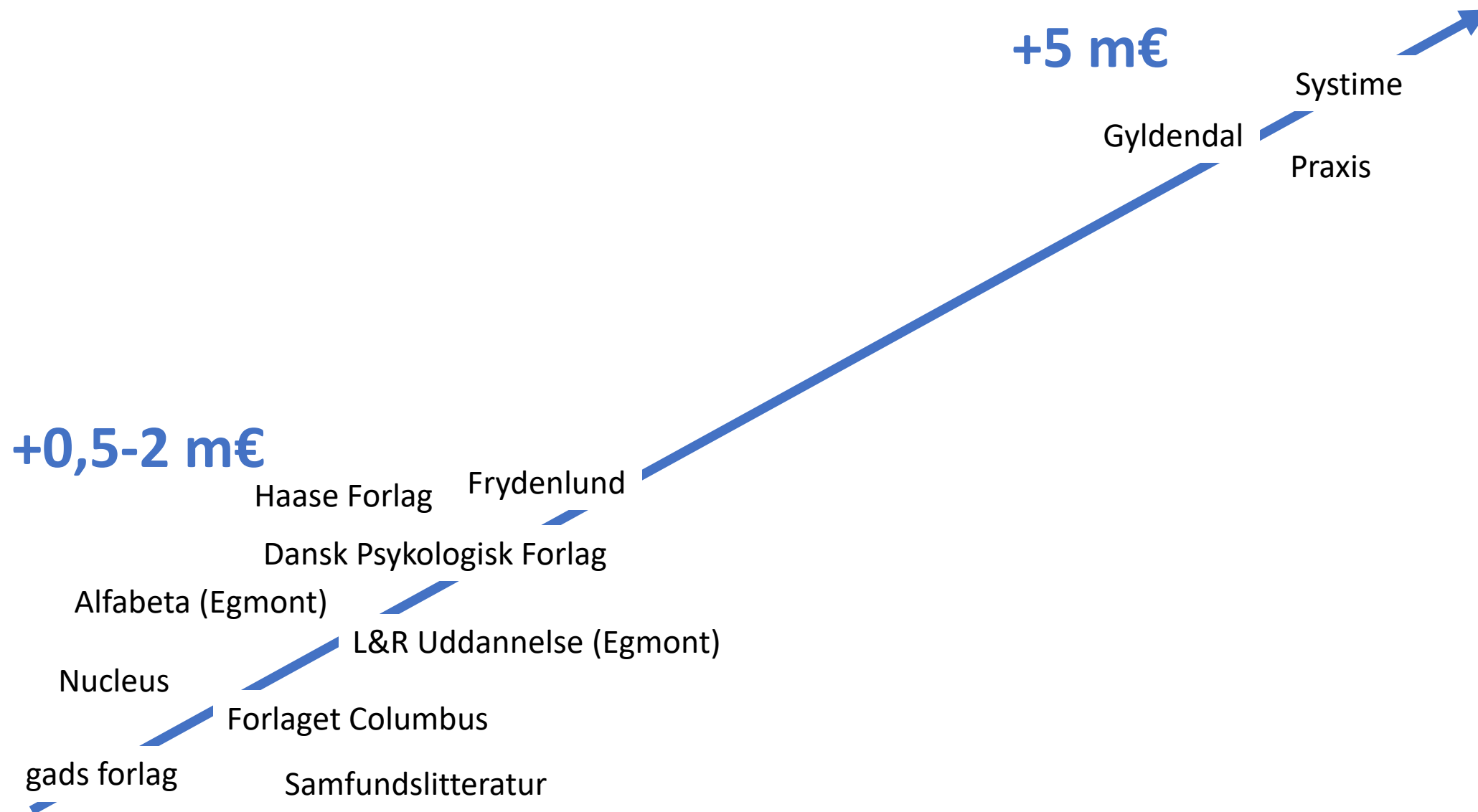
Market trends - II



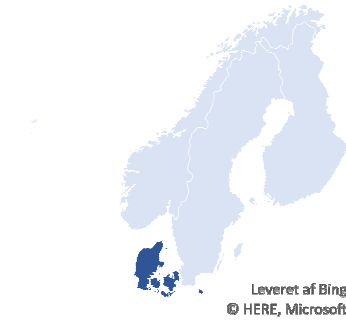
Market players primary school



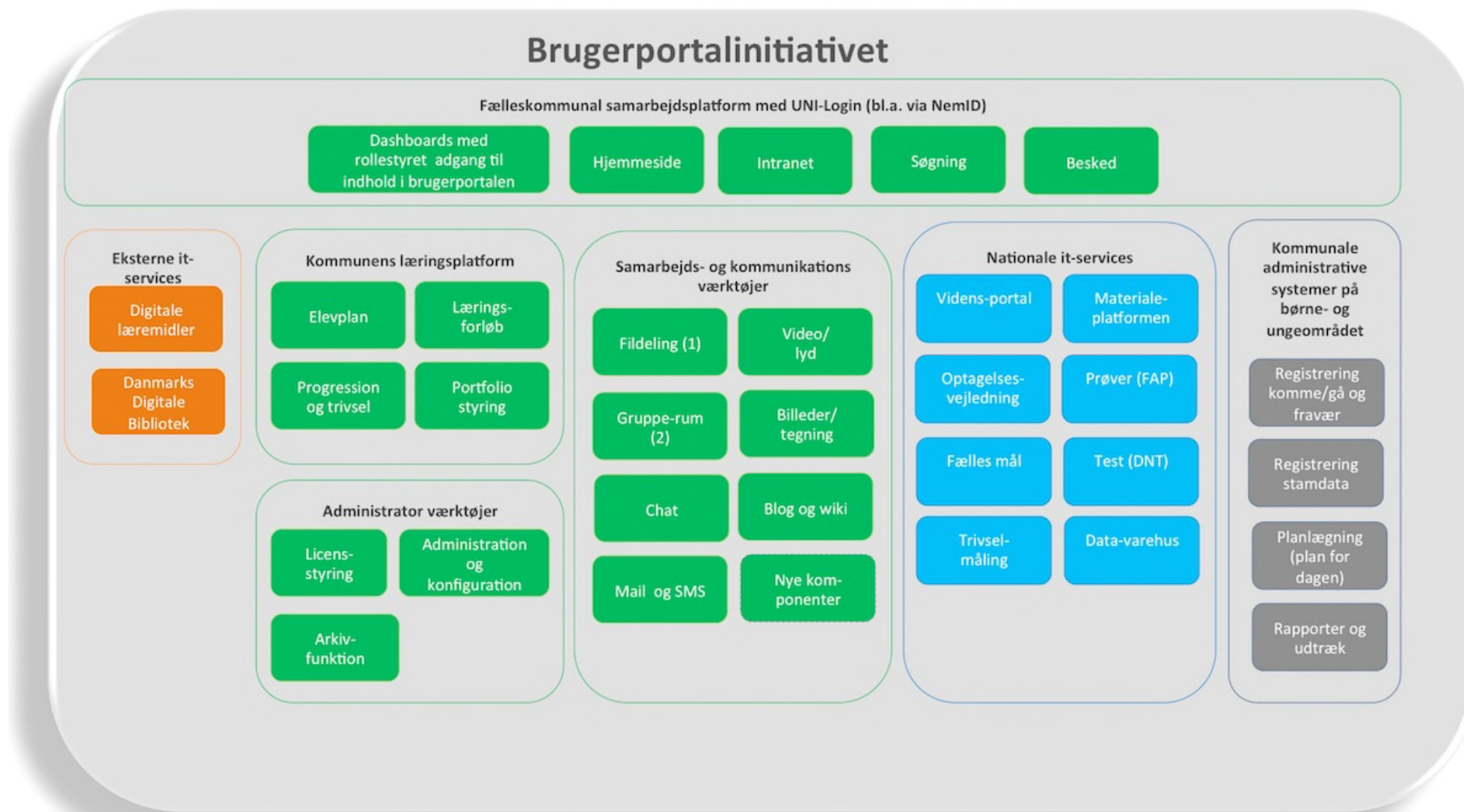
Market players upper secondary school



Government regulations



Digital framework



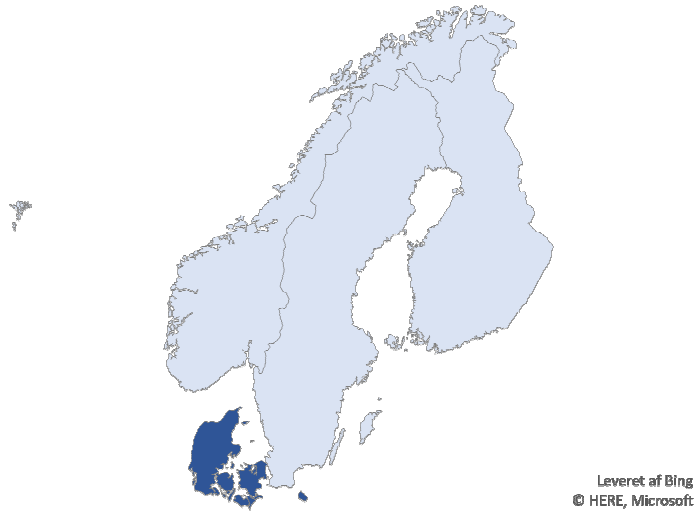


NÁM

Nám is a non-profit, public publishing house producing both printed and digital materials. In addition to its publishing business, Nám is a center for education services offering IT-solutions, library, courses and guidens for teachers.

How do you give pupils in the small communities the opportunity to access up-to-date / modern digital teaching aids?

Faroe Islands and Scandinavia



Presentation

1. The Faroese market
2. Market players
3. Government regulations
4. Digital framework
5. Other significant issues

The Faroese market

- public funding – has been pretty much the same for several years
- We sell our material to the schools (primary), but the market is so small, we're just pretending there is one – unfortunately
 - Analogue books are our primary product, but we also deliver these books in a digital platform. Two schools use only digital, the rest mostly use the digital material for the teacher to show on the interactive whiteboard
 - We have made 'flat rate' deals with the two schools
- Working on a new funding model, where the municipalities pay a fixed amount/ pupil. Then every pupil has access to both digital and analogue material.
- In Upper secondary school the students buy the material themselves
 - Digital is the primary product

Market players

- Nám is the only provider for primary school
- Nám has approx. 20 % of the market share in upper secondary school
 - The other 80 % are divided between different Danish players
 - This is mainly because upper secondary school has not been a focus area for Nám
- We use the same digital platform as several Danish publishers use

Government regulations on digital materials

- There are no special subsidies for digital material.
- Curriculum for all subject state that ICT must be used in the subject
- Digital material follows the same requirements as the analogue
 - There is no institution which regulates that the requirements are followed

Digital framework

- Implementation/regulation of LearningManagementSystems
 - We do not have any regulation on using LMS
 - We are working along with the municipalities and the government to implement a LMS
- We use O365 as a single-sign-on-system
 - Unfortunately we do not use the Danish uni-login

Other significant issues

- How do you give pupils in the small communities the opportunity to access up-to-date / modern digital teaching aids?
 - It must be public – the market is too small for private providers
 - We have to collaborate with bigger e.g. Danish providers
 - The new deal with the municipalities will make sure that every pupil has access to the same material.

Country presentations

Market situation in the Nordics



SUOMEN KUSTANNUSYHDISTYS
FINLANDS FÖRLAGSFÖRENING



FINLAND

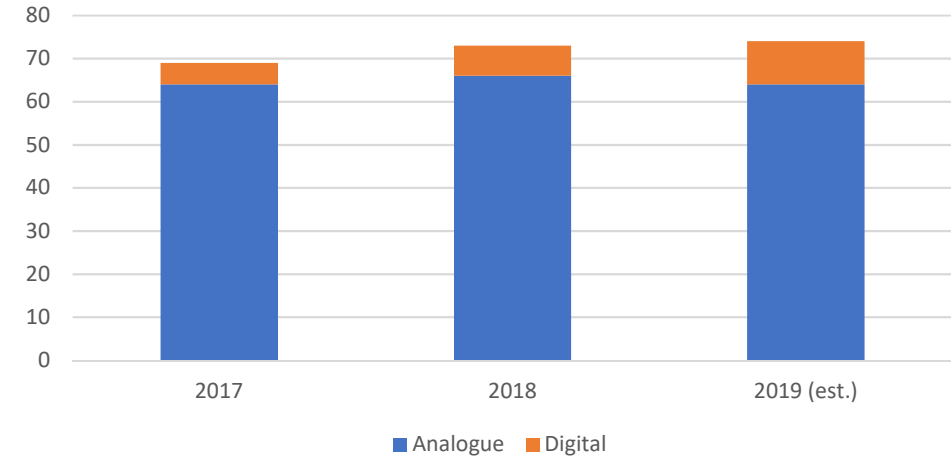


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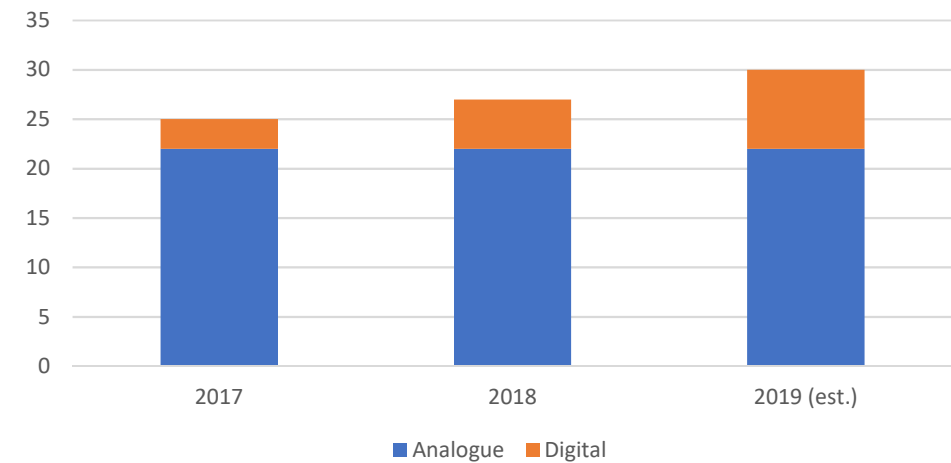
Presentation

1. Overall market trends
2. Market players
3. Government regulations
4. Digital framework
5. Other significant issues

Primary school - Market value (m€)



Upper secondary school - Market value (m€)



1. Overall market trends



- Slight growth
- Transition from analogue to digital

2. Market players



- Two big players: [Otava](#) and [Sanomapro](#)
- Then [Edita](#), [Edukustannus](#), [Opiki](#), [S&S](#), [eOppi*](#) and [Tabletkoulu*](#)

* only digital content

3. Government regulations



- New government makes also secondary level studies free for students (K 12). It is already free to K 9.
- New curriculum for upper secondary school roll out September 2021

4. Digital framework



- Pursuit for digitalization but no real statewide strategy
- Hopes for *single sign in* –system organized by government
- *Digital makes it cheap* –thinking is common

5. Other significant issues



- Free secondary level studies changes distribution channels



FIN

Nordic Conference for Educational Publishers

Country Report from Iceland

Heiðar Ingi Svansson

Director of IDNU Publishing House
Chairman of The Icelandic PA



FÉLAG ÍSLENSKRA
BÓKAÚTGEFENDA

The whole book market in a crisis



FÉLAG ÍSLENSKRA
BÓKAÚTGEFENDA

- **15% decrease in publisher's turnover from 2008 - 2018**
 - But 40% decrease if inflation is taken into account (inflation was high in Iceland after the economical crash in 2008)
 - -2,3% decrease between 2018 and 2017
 - Less decrease than it has been in between years since 2015
- **Estimated number of sold copies went from 2,54 m in 2010 to 1,33 m in 2018**
 - Or 47% decrease
- **Total annual turnover 3 Billion ISK or around 22 m Euros in 2018**
- **VAT on books was raised from 7% up to 11% in January 2015**

New approach to turn things around



FÉLAG ÍSLENSKRA
BÓKAÚTGEFENDA

- **New legislation aims to assist the publishing business in Iceland**
 - Confirmed by the Parliament in December 2018
 - Valid from 1st January 2019
 - The State agrees to pay back to publishers up to 25% of the total direct production cost of publication for books in Icelandic
 - Also valid for Educational Publishers
 - The budget for this operation ISK 400 m ISK (around €3m) for the year 2019, that will be paid back to publishers
 - The Icelandic Publishers Association has been working hard for the last year on the legislation, in a close cooperation with the new Minister of Culture and Education, officials from several Ministries, members of the Parliament, and other stakeholders

The Educational Publishing Primary Schools (6-16):



FÉLAG ÍSLENSKRA
BÓKAÚTGEFENDA

- **Menntamálastofnun → The Directorate of Education**
- **93% State monopoly on publication for educational material**
 - Leads to market failure for independent publishers
 - Possible risk of Censorship and a threat to Freedom to publish?
- **Limited selection of materials for teachers**
- **Lack of innovation possibilities for new business developments**
 - Very limited budget for school to buy new material from others than the State one
- **System evolves around an all-in-one institution - mainly due to small size of the market:**
 - publication - monitoring - evaluation - collection of data - analyzing - coordinate exams - etc.
- **Total annual budget of 1.017 million ISK**

The Educational Publishing Upper Secondary Schools (16-19):



FÉLAG ÍSLENSKRA
BÓKAÚTGEFENDA

- **Free market with no policy or a structure**
 - No strategic policy exist for digital publication (for all school levels)
- **Market failure because of:**
 - Schools make their own curriculum
 - High volume of used books sold via book stores
 - Difficult to cope with updates and changes in printed textbooks
 - Teachers and authors can get direct grants for educational material with no obligation for publication
 - Direct sales or/and distribution to students
- **Mainly two publishers still operating on the market**

The Educational Publishing

What needs to be done?

- **A total restructure and strategic change for all school levels**
 - Does our current system provide the best result?
 - Should the State pay for educational material for Upper Secondary Schools as well?
- **A “Scandinavian” model needs to be adopted**
 - Based on trust between stakeholders with a clear role of the operators
 - Ministry - Directorate - Publishers - Teachers - Students
- **Keep publishers in the loop while these changes are made**
 - Use the knowledge and the infrastructure that exist among Icelandic Publishers



FÉLAG ÍSLENSKRA
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But
meanwhile...

ALLAR TOSKUR 25-60% AFSLÁTTUR!



LÝKUR Í DAG!

SKIPTIBÓKA BÓNUS! +400 kr.

Fyrir hverja skiptibók sem þú skilar inn færðu **400 krónur í bónus!** í Pennanum Eymundsson færðu **BÓNUS** fyrir bækurnar þínar. Lokadagur skiptibókabónusar er í dag (19. ágúst).

OFTAST LÆGST! Penninn Eymundsson er oftast með lægsta verðið á námsbókum samkvæmt verðkönnunn ASÍ sem gerð var 15. ágúst 2019!

*Hverja skiptibók er með lagavirði á námsbókum, þegar endisgjafir samgöngulega er seld með mat.

Asustreiti 10
Skólavörðungur 11
Laugavegur 17
Hálfarshóli 4
Íslands - Hálfarshóli 2

Hálfarshóli - Strandgata 31
Ráðgjafar - Krausesta 4
Reynir - Hálfarshóli 31-32
Ráðgjafar - Dúlfur 1
Veitnaðarvegi - Ólafur 2

Alfakilla 14, Myrd
Konglunnar
Konglunnar
Sinnvöld
Höfð - Garðarshóli 9

PENNINN Eymundsson

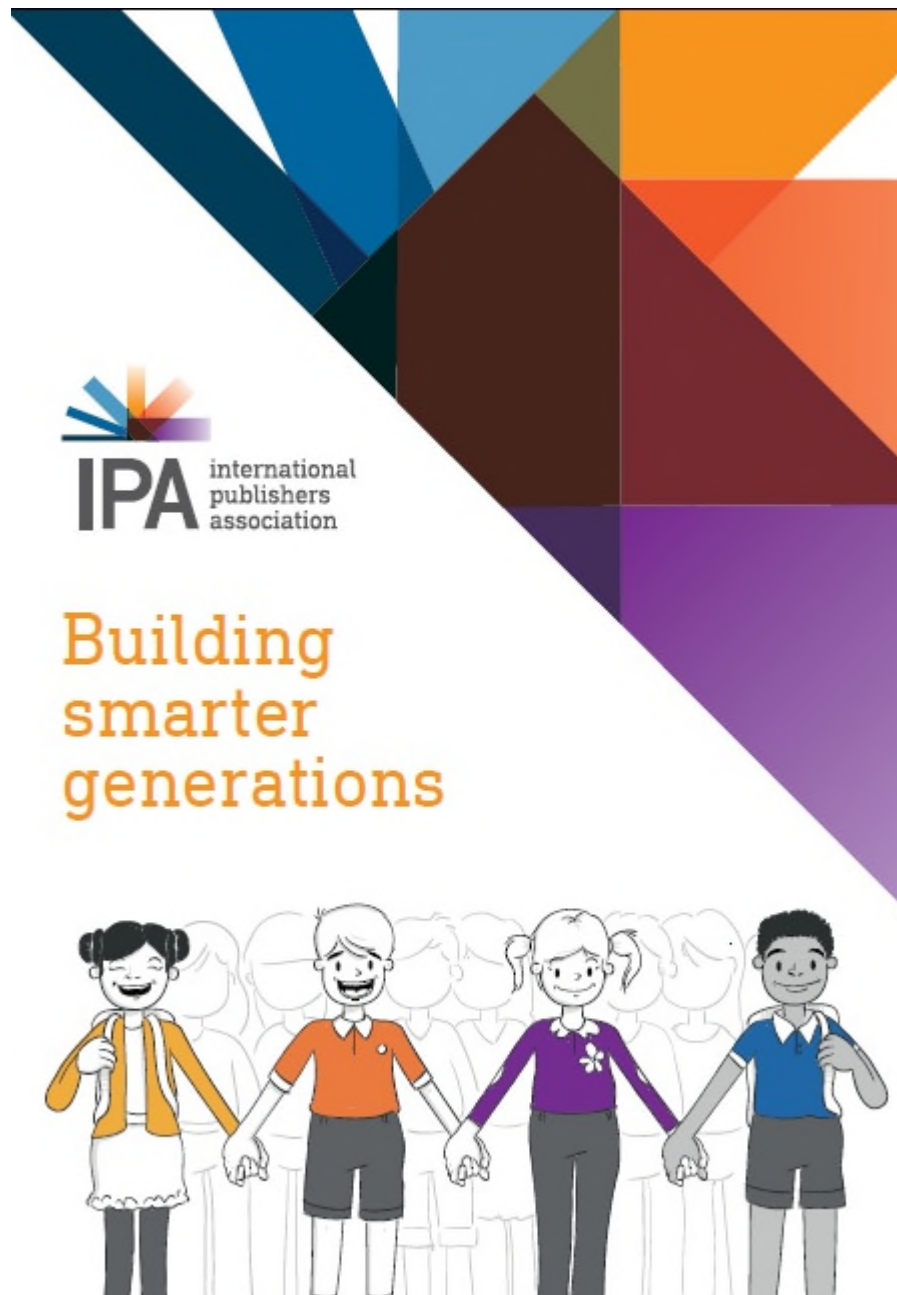
340 2000 | penninn@penninn.is | www.penninn.is | www.eymundsson.is
Vörðun er tryggð með vörðun. Tölur bókanna eru seldar til og með 19. ágúst. Uppgjafir eru bærar með fyrirséðum og myndlegum.

Lets work together on....

Heiðar Ingi Svansson

heidar@idnu.is

www.fibut.is



FÉLAG ÍSLENSKRA
BÓKAÚTGEFENDA

Market situation in Norway

Kristenn Einarsson
kristenn@forleggerforeningen.no



THE NORWEGIAN
PUBLISHERS ASSOCIATION

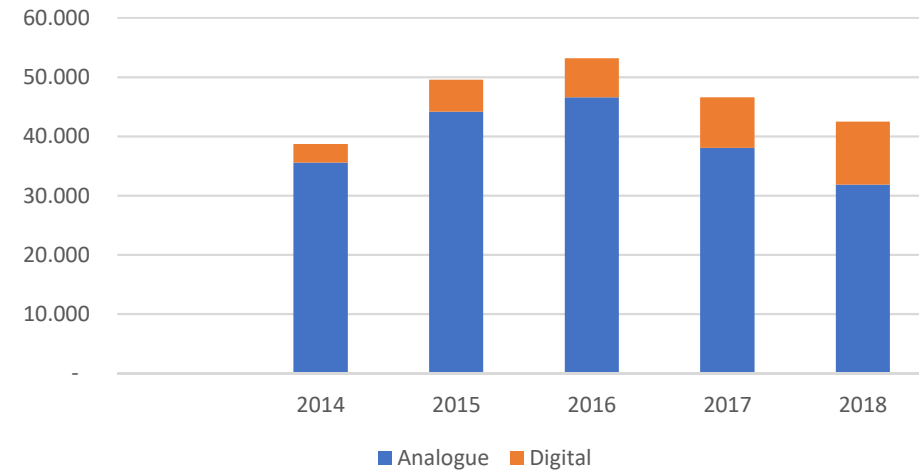


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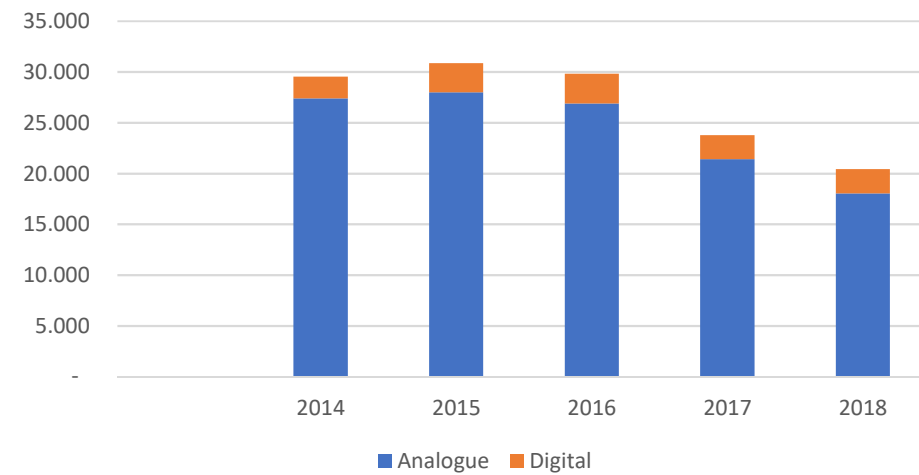


THE NORWEGIAN
PUBLISHERS ASSOCIATION

Primary school - market value m€

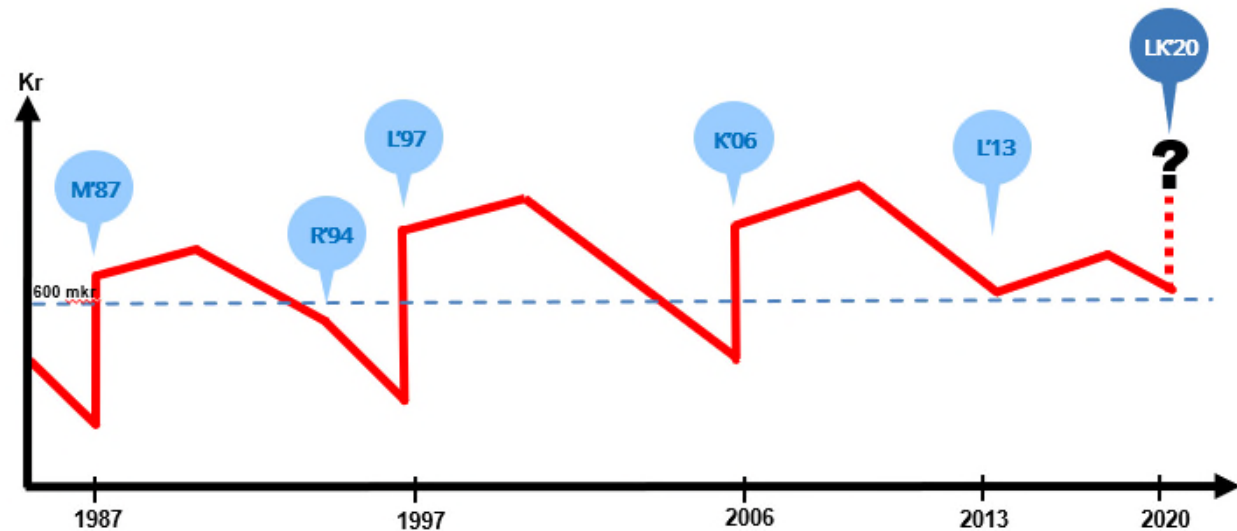


Upper secondary school - market value m€



Overall market trends

- New curricularas («Fagfornyelsen») autumn 2020 – decline in turnover since 2016
- Digital is more and more important



Market players

- Four major publishing houses (approx 75 % of the market's total turnover): Cappelen Damm, Gyldendal, Aschehoug, Fagbokforlaget (VB)
- Other publishing houses: Tell Forlag, Davvi Girji, Elforlaget, Solum Bokvennen etc.
- A lots of providers of digital learning resources: TV2 skole, Dragon Box, Kikora, Kahoot, Creaza, Poio, LearnLab, Conexus, Skooler etc.
- International players: Google classroom, Microsoft Teams
- Public initiatives: NDLA (& NDLA-G/FriDA?)



Government fundings on digital materials: The technological school bag

- Total of 450 mNOK in five years, might be increased
- Grants to developers of digital learning materials
- Grants to municipalities and regions when purchasing digital learning materials («the Danish model»)
- Support to improve teachers' skills in programming, purchase of hardware and other infrastructure
- Digital learning materials in the education of teachers



«Fagfornyelsen» needs funding

- Our estimate: 600 mNOK a year for 3 years (Last reform, about 600-700 mNOK a year)
- Funding of the digital will most probably be taken care of, but what about the rest?
- Close dialogue with Department of Education, Directorates, key-members of Stortinget.
- Lobbying in cooperation with teachers- and student organizations and other players



What about NDLA?

- Recap: Public «publisher» of digital learning materials (11-13), owned and financed by the regions
- Despite a lot of criticism, the project continues
- «NDLA» in primary school?



Other issues

- Accessibility in educational resources-project



Market Situation in Sweden

LÄROMEDELSFÖRETAGEN

Stefan Persson and Åsa Steholt Vernerson

Swedish Association of Educational Publishers



Educational Publishers

Publishers	Turnover 2018 (MSEK)*	
1. Studentlitteratur	383	
2. Liber	353	(2017)
3. Natur och kultur	275	(estimate 2018)
4. Sanoma	225	
5. Gleerups	179	

Moreover, there are a few medium sized educational publishers and a large number of small publishers and digital startups.

* Total revenues from K-12 and Higher Education.

Outline

1. Background
2. Challenges Facing the Educational System
3. Sales of Educational Material
4. Sales of Printed and Digital Educational Material
5. Government Initiatives
6. Digital Framework

Background

- Sweden has always considered itself a nation with a very good educational system
- In 2017, the national budget for primary and secondary school amounted to 166 000 MSEK
- Strong interest in education policy among political parties and the public

Challenges Facing the Educational System

- Ongoing debate about the quality of the educational system:
- PISA results below expectations, equality, segregation, profits in the welfare system, consequences of digitalization, etc
- Other challenges:
 - Increasing number of pupils in grade 1-9 (2012: 889 000 pupils, 2018: 1 068 000 pupils)
 - Large and increasing shortage of qualified teachers (2018: -65 000 teachers)
 - About 25% of the pupils are either born outside of Sweden or have two parents born outside of Sweden
 - About 25% of the pupils leave lower secondary school without having attained the goals for the final grade in all subjects (i.e. they fail to pass in at least one subject)

Taking these challenges into account, one would imagine that the market in Sweden for educational material is very strong.

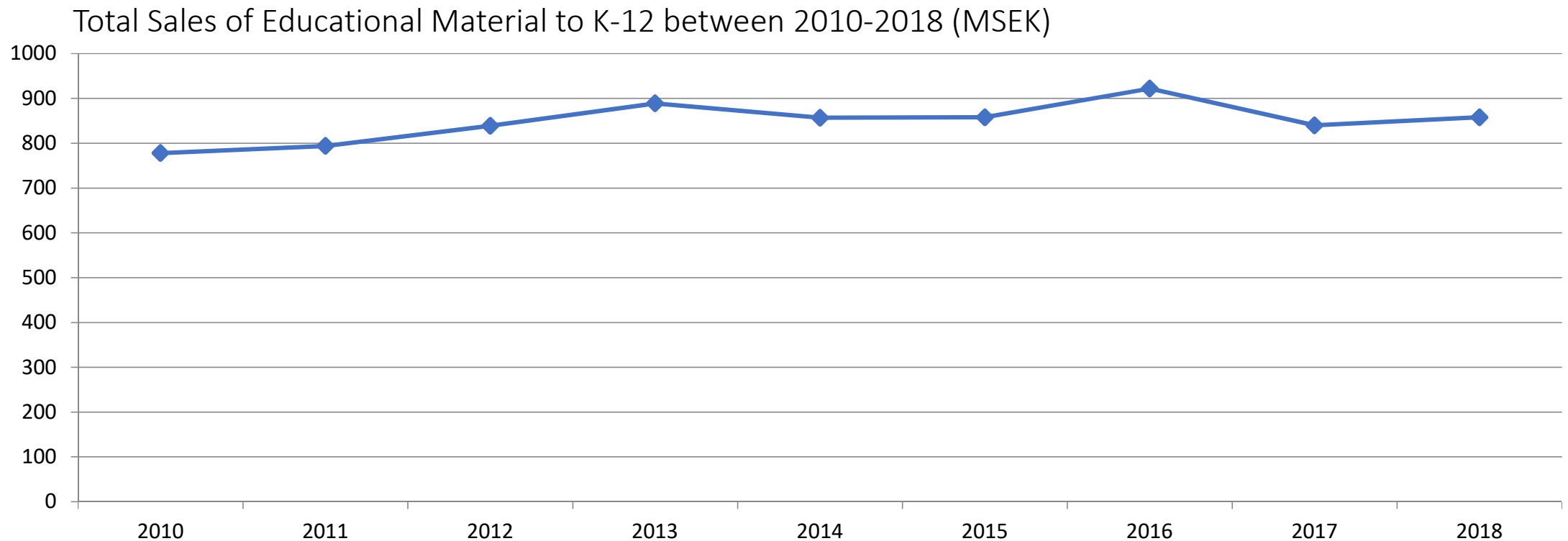
However, this is not the case.

Access to educational material has never been a priority issue for the politicians, authorities or private interests responsible for Swedish schools. Moreover, the current weak municipal economy is adversely affecting the allocation of resources used to purchase educational material.

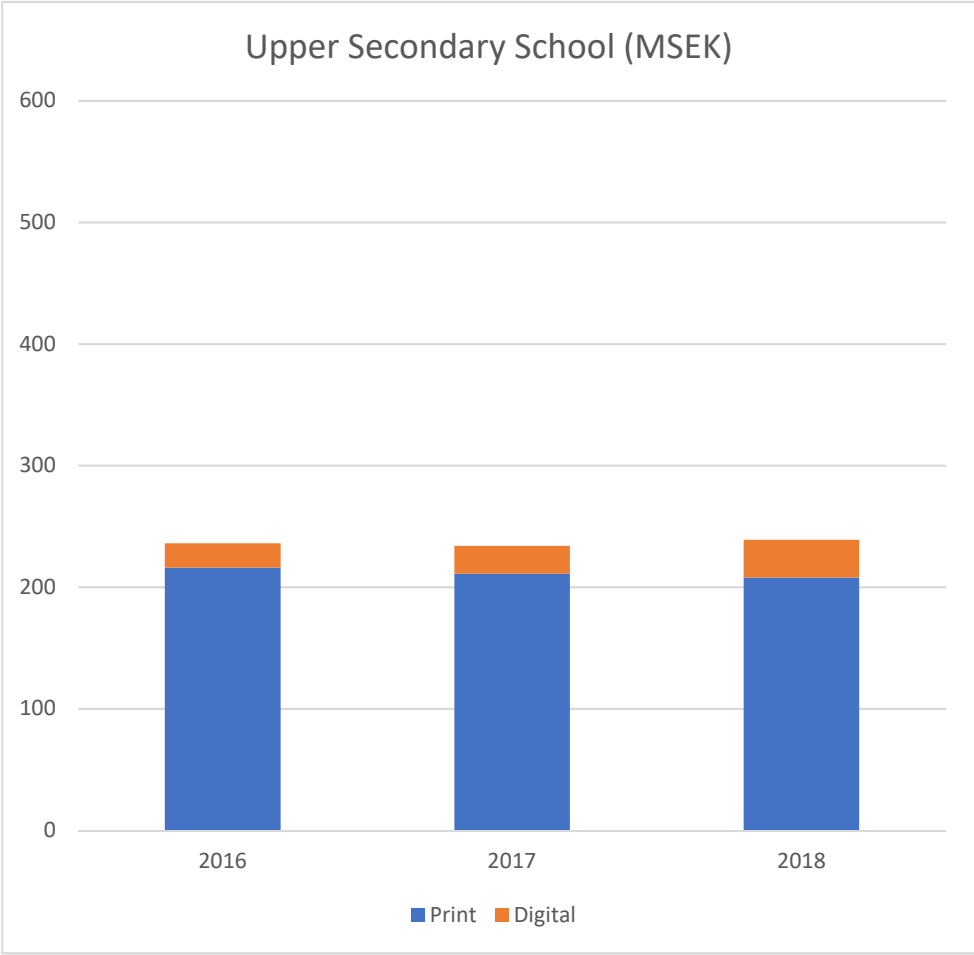
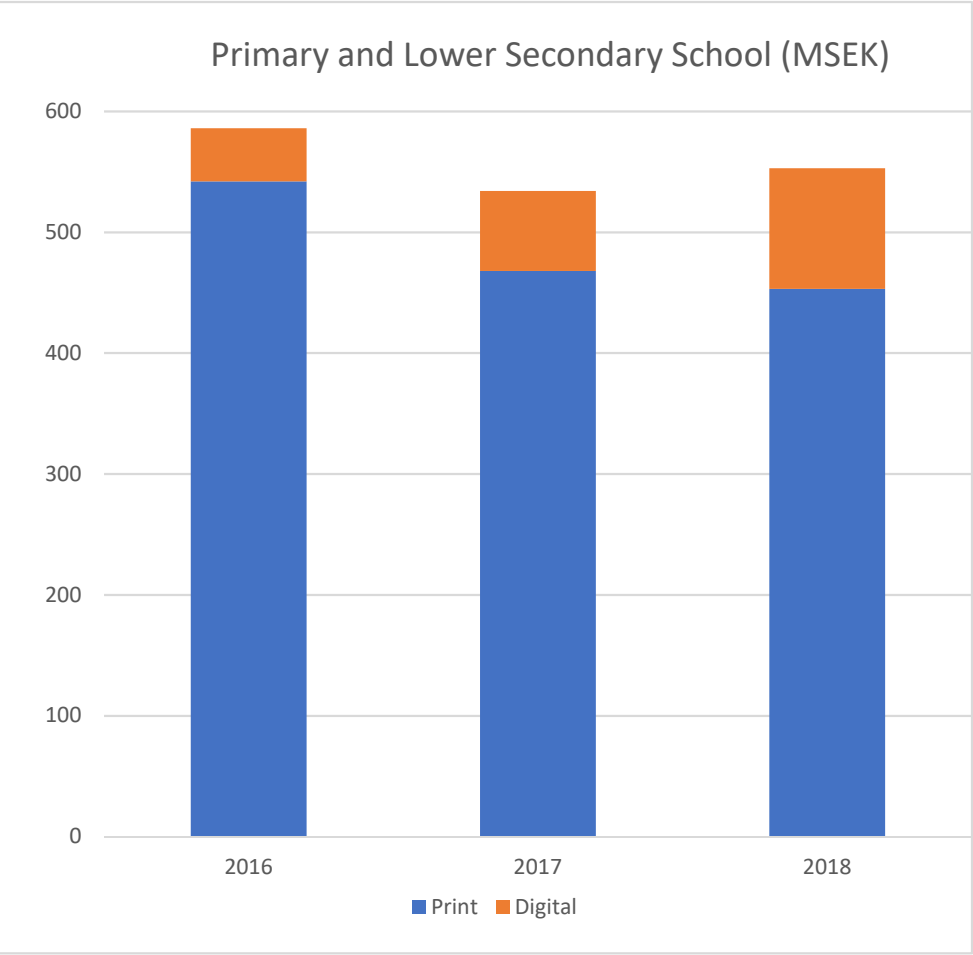
Sales of Educational Material to Primary and Secondary Schools

Sales of educational material to primary and lower secondary schools amounted to 522 SEK per student in 2018 (582 SEK in 2016, 510 SEK in 2017).

Only 0,6 % of the national budget for primary and lower secondary school is used by municipal or private schools to purchase educational material.



Sales of Printed and Digital Educational Material



Government Initiatives

- New curriculums for primary and secondary schools 2020
- Admission of a national strategy for digitalization of the educational system 2017
 - "Swedish schools should become a leader in the best use of digitization to achieve a high level of digital competence and to promote knowledge development and equivalence"*
 - Digital competencies for everyone in the educational system
 - Equal access and use
 - Research and follow-up
- Collaboration of Central Government and the Swedish Association of Local Authorities and Regions (SALAR, SKL) 2018/2019
 - Develop an action plan linking the strategy with the needs and then propose initiatives and activities
- National assessments in primary and secondary school to be digitalized, starting 2022

Digital Framework

Fast growth of digital educational material

- Blended tools i.e. printed book in combination with digital learning materials
- Digital educational material (all in one)
- Specific material for practice or assessment

Big difference between schools regarding supply and use of digital tools

Focus on hardware rather than on educational content

Adapt to the digital ecosystem in schools

- Expectation of common standards
- Authentication and authorizations– Skolfederation, Skolsynk, Skolon
- Planning, communication and documentation - LMS, Google Classroom, Microsoft Teams etc.
- Digital assessments - Dugga, DigiExam, Inspera etc.