**EEPG Marketing network meeting in Istanbul, 15-16 April 2010**

**Participants:**

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**Minutes of the meeting**

**Thursday 15 April:**

**Morning session:**

- What is going on in e-learning at most progressive publishers in the EU and will this change marketing strategies?
  - Open discussion: how well prepared are different countries on new age of e-materials (whiteboards, computers for each student, …)

Eyüp Kul (Birey Publishers) presented the situation of e-learning in Turkey. Different distance learning systems are being integrated into the educational system of Turkey and the approach has been initiated by the National Educational Ministry and Universities. The main opinion is that e-learning can support classical learning as an efficient and motivating supplement.

It was stated that we as educational publishers cannot and should not resist this development. The main problem we face is the sufficient diversity and quality of e-materials.

Following this general introduction Eyüp Kul gave an overview of the product line of Birey Publishers. (Click to see the presentation)
Paul Hedlund (Gyldendal Education) gave a series of relevant and important aspects of the future of e-learning, not least in the perspective of the Norwegian situation where national authorities supported by state initiatives are now producing e-learning materials to be given for free to the schools in Norway. Parallel to this development Preben Späth mentioned the EU funded projects around the European Schoolnet (Learning Resource Exchange=LRE, ASPECT, MELT and CALIBRATE) who are behind depositories of more than 140,000 free downloadable learning objects for the schools of Europe, it should be notice that more than 15 Ministries of Education in Europe back up this initiative. Here are some relevant links to visit (for more info look at the minute of the EEPG Production network meeting 25-26 March 2010 in Ljubljana. (Click to see the presentation).

In the following discussion Daniel Zderic (Profil) suggested that the EEPG or similar organisations put pressure on Brussels, because there is a need to fight for the sake of educational publishing in Europe. Furthermore Paul Hedlund mentioned an IPA workshop in London January 2010 where Paul had participated along with several European educational publishers, discussing the threats to private publishing in the future of e-learning products. He also announced a coming meeting in Barcelona (May 2010) of this working group in the framework of IPA.

Elena Pataki (Patakis Publishers) gave a detailed description of the many aspects of e-learning from initial planning to implementation, including the level of education level, decision on input/output device, education as
product, service and free, creation of content, content management systems, delivery channels LMS, mobile, virtual worlds, off-line (i.e. books) and choice of business strategy. (Click to see the presentation)

Kina Andreeva (Prosveta) presented the e-learning strategies of Prosveta by commenting that the future of educational publishing is very difficult. For the time being Prosveta produces e-learning materials intended mainly for teachers to be taken as additional materials to the books. This is the case for subjects like Chemistry, Physics and Biology. They also produce e-learning materials for grade 5 and upward. Schools in Bulgaria are not yet fully equipped with computers and other e-devices. Secondly the teachers are not yet enough used to implement ICT in the teaching and learning process. Prosveta are now distributors of interactive whiteboards and also deliver e-products for these devices. For marketing purposes they also use blogs and Face book to spread news about their educational products.

Sintija Buhanovska (Zvaigzne Publishers) told that Zvaigzne had launched their first e-book in February 2010. In addition Zvaigzne are selling e-book readers. In general e-materials are coming slowly into the schools in Latvia. Zvaigzne have produced e-materials for a History textbook for 6th grade, and are at the moment preparing a similar product for Geography. As regards e-learning materials in general Zvaigzne have strong competition from a company that also sells interactive whiteboards, and there are relatively many whiteboard in the Latvian schools. Each teacher in Latvia has a computer at his/her on disposition, but in general teachers are till rather reluctant towards ICT in schools. Such materials seem to be most popular with language teachers. Finally Sintija mentioned the annual exhibition of educational materials in Birmingham (UK) every March which could bring much inspiration to educational publishers.
Sergei Kuznetsov (Prosveshcheniye Publishers) presented the situation of e-learning in Russia, where 95% of the schools are equipped with computers. Very often the learners are better at using the new device than the teachers. The state has approved a special budget for the modernisation of the schools which includes ICT. It is interesting that training of teachers in the use of ICT is not foreseen in this budget. Prosveshcheniye has a market share of approximately 40% of the market for educational materials. As for e-learning materials the company has so far produced 200+ pieces of educational software and 300+ e-books; and they maintain 18 websites with educational materials. Finally Sergei stressed that all software is produced via outsourcing (Click to see the presentation).

Daniel Zderic (Profil International) gave a general presentation of the company (Click to see the presentation)

Afternoon session:

- the current situation in each company regarding e-learning materials and the future plans
- Marketing strategies for e-learning applications (YouTube clips, web pages, etc.)

Daniel Zderic (Profil International) gave a presentation of the current situation of e-learning materials and strategies in Profil International. His opinion is that most teachers are not yet well prepared for using ICT in
their teaching activities. From a ii to educational publishers in Israel he reported that 25% of the income of educational publishers there come from selling e-learning materials. His view is that in 7-10 years time e-learning will be in focus and textbooks will be seen as supplementary materials. Daniel proposed a close cooperation on the production of e-learning materials among educational publishers in different countries (Click to see the presentation).

Marusa Kmet (Rokus-Klett) started out with a short introduction to the company Rokus-Klett that has 68% of its income coming from textbooks, and they are now the biggest educational publishers in Slovenia. As for ICT the equipment in Slovenian schools is 8 pupils per 1 PC. More than 45% of the pupils have access to computer at home. Only 22% of the schools have interactive whiteboards installed. In Slovenia educational software is produced by private producers/publishers and then bought by the Ministry of Education after public tenders. The mostly used e-material is surely the DVD, but also whiteboards are becoming very popular, and Rokus-Klett sells products for these devices. As regards the pricing DVDs are sold at 30-50 € per piece. Normally the school is the buyer of a license and gets pass word for each teacher (license fee is between 50 and 250 € per year). Among the marketing strategies used Marusa mentioned teacher training seminars, leaflets and posters plus web ads and YouTube clips. (Click to see the presentation)

Maire Tänna (Koolibri Publishers) first indicated that compared to most other European countries Estonia is very small with only 1.4 million inhabitants. Consequently she said that if you reduce the Slovenian figures to 1/3 they would show the situation in Estonia. As for e-learning nothing interesting has happened yet. We are afraid only very few customers will be interested of e-learning materials because of high price. Maire presented e-exercises to the textbook series Step by Step as first example of e-materials. Step by Step is a series of books for learning English supported by series of CDs (maybe you should put here the link to e-exercises - http://failid.koolibri.ee/step/). Right now there are exercises only for first book, but we plan to develop e-exercises for all exercises in these books. An important obstacle is till that it is very difficult to sell e-materials because in the opinion of the customers e-materials should be free.

I the final overall discussions Paul Hedlund presented a new sample of the famous I-Pad which compared to the already old fashioned Sony Reader will probably be the winner on the educational market in few years – at least either the I-Pad from Apple or a cheaper version not yet seen.
In the evening all participants were taken to a sailing tour on the Bosporus between the European and the Asian part of Istanbul.

Friday 16 April:
which topics are most popular in kindergarten curricula?
- strategies for selling children’s materials for kindergarten
- where do we have opportunities?
- a successful and/or an unsuccessful story of kindergarten marketing strategies - open discussion - visions of each participating company of what will be going on in five years time in the kindergarten market

Anastasia Kozlovets (Proveshcheniye Publishers) presented the company’s programme and strategies for materials for the kindergarten market. On one hand there are the so called aids for schools (used in preschool education); on the other hand there are special activity books of different types. Proveshcheniye has produced more than 200 titles for this market. An interesting development was shown in the figure for future schools: The number of primary schools is decreasing while the number of gymnasia is increasing, so the interest in education seems to be getting stronger (Click to see the presentation)

Kina Andreeva (Prosveta) explained the situation of the kindergarten market in Bulgaria. Two years ago the Ministry of education introduced a new way of preparing kids for schools, e.g. to ensure that all kids (including immigrants and Roma children) master the Bulgarian language before they enter schools. A one year pre-school training became obligatory. A two-year obligatory pre-school education shall be introduced from 2011. Kina showed the so called ‘hand in hand’ system that covers such subjects as literature, social communication, Maths, environment, music, painting etc.

In Bulgaria there are special nursery groups and groups of 2-3 years old children which are planned for children who enter kindergarten. Books for these groups are normally paid by the parents, while the learning activities around the books are paid by the state. The next market segment will be 3-4 years old kids who are visiting kindergarten, and next year will be the group of 5-6 years old kids in the so called preparatory group. Later come the groups of 6-7 years old where the learning activities are compulsory. All the books for these pre-school groups are paid by the state.

Series of diagnostic books has been developed for the pre-school group. And for all level new diagnostic books are planned along with a whole series of teacher’s books and teaching aids like puzzles and cards for games. As for marketing Prosveta usually organises meetings with teachers to explain their product which seems to be quite successful. Groups of 9-10 authors give presentations and also kindergarten teachers will go around the country and present the system of kindergarten materials to colleagues (Click to see the presentation).

Sintija Buhanovska (Zvaigzne Publishers) informed about Latvia where the preschool market is very strong; and it works on three levels:
- a) The grandmother group market is for books to be used at home
b) The friend group market includes books and e.g. jigsaw puzzles which are bought as presents for the kids by their friends – and this market is indeed very successful.

c) The teacher group books include different teaching aids and are foreseen for use in kindergarten.

It is noted that kindergarten is not compulsory in Latvia, however, preschool education (for 6 years old kids) is more or less compulsory, but kids can in theory also learn at home. It has been decided by the government that all children must have certain skills before they enter school – and this will be compulsory from the age of 5 years.

Maire Tänna (Koolibri Publishers) mentioned the interesting topic of so called ‘better’ schools where the parents want their kid to go after kindergarten. Since many parents want the best or their kids these schools have difficulties to decide which kids should enter their schools. The solution is in most cases that these schools (cantered around Tallinn and Tartu) organise tests to find the ‘right’ kid. As a consequence many kindergartens feel obliged to ensure that the kids already have certain skills in the kindergarten – on demand from the parents. It should be added that there are actually compulsory curricula for kindergartens in Estonia. But clearly the danger is that the kindergartens teach the kids more than is necessary in light of the curriculum. Maire indicted also that the kindergartens have a budget for books, paid by the state. There followed a good discussion about parents sponsoring schools and the short step to different kind of corruption in several countries.

Rok Kvaternik (Rokus-Klett) told that all schools in Slovenia are public, and that kindergarten is relatively expensive, but not compulsory. There is no market for educational publishers in the kindergarten sector. Only 14% of the children in Slovenia attend kindergarten.

Eyüp Kul (Birey Publishers) explained the pre-school situation in Turkey. Out of the 70 mill. inhabitants in Turkey around 1 mill. are preschool children. There are both private and public pre-schools. Pre-school curriculum is not compulsory, but only advisory. The materials for this market are chosen by the teachers and paid by the parents. By 2013 pre-school education will be compulsory in Turkey, and it will last for 2 years.

Anastasia Kozlovets (Proveshcheniye Publishers) first presented a success story, namely Balass, which comprise a series of books based on and structured along Leontev’s pedagogical theories. The basic idea is an idea of educational continuity: short lessons, easy exercises. the program and the set of textbooks, learned at primary school, are connected and based on the program and the set, learned at kindergarten. The aim is to open and develop potentials that are for sure present in all children.

As an example of an unsuccessful story Anastasia described the series of textbooks ‘from childhood to teenager’: the sales figures of this series decreased by 30% very quickly. It was a program of materials for learners
at the age from 1 to 7, but the main mistake was that the program had not been really connected to the defined set of textbooks in primary school. Another success story was the introduction of the textbooks in the series ‘Continuity’ for preschool and ell integrated into the primary school. Furthermore Anastasia explained that the birth rate in Russia is increasing (by 20% from 2009 to 2015). Finally Anastasia stated that branding has achieved an increasing importance in Russia, so now the name of the publisher behind a (text)book means a lot. She also commented on kindergarten again and noted that books for kindergarten are bought by the parents (Click to see the presentation).

Summary and evaluation of the meeting; suggestions for topics at coming meetings:
All participants filled in a questionnaire giving their individual evaluation of the meeting.
Finally two topics were suggested for coming meetings of this network:

- E-learning materials and marketing strategies
- How to motivate the marketing staff for their work

It was furthermore decided to ask Sergei Kuznetsov to take initiative to organise the meeting of the marketing network in Moscow in 2011.

On behalf of all participants I wish to thank the representatives of Birey Publishing for their excellent organisation of the meeting.

April 2010
Preben Späth