



A Communiqué from the Horizon Project Retreat

Building on Ten Years of Research into Emerging Technology in Education

On January 24-26, 2012, one hundred distinguished thought leaders from all over the world were invited to come together in Austin to mark the tenth anniversary of the NMC Horizon Project with a very special convocation and retreat. Over its decade of work, the Horizon Project has grown to the point that it may very well be producing the single most important body of research into emerging technology within the world of education. With more than one million downloads and 27 translations in the past ten years, the *NMC Horizon Report* series provides the higher education, K-12, and museum communities across the globe a key strategic technology planning tool that is continuously refreshed and updated.

The NMC and the Horizon Project are best known for its flagship *Horizon Reports* that focus on higher education and K-12 globally, but the research into the uptake of technology goes far beyond what is published in those key publications. The NMC does extensive work regionally around the world as well, working with ministries of education and other key groups to produce specialized reports for Latin America, the UK, Australia, and New Zealand, and is currently working on projects in Asia (Singapore, Hong Kong, Korea, and Japan), while planning projects for Brazil, India, and Africa. The NMC Horizon Project research is truly global in scope and reach.

Dr. Larry Johnson, CEO of the NMC, and Dr. Lev Gonick, VP and CIO at Case Western Reserve University and Board Chair Emeritus of the NMC, worked together as Horizon Project Retreat Co-Chairs to plan a very special event to mark the milestone, tapping into energy and expertise from all over the world via the 100 experts who served on past NMC Horizon Project Advisory Boards and collectively represented every sector of formal and informal education. Leaders from six companies joined the dialogs as event co-sponsors: Hewlett Packard, the Bill and Melinda Gates Foundation, Apollo Research Institute, Enterprise Hive, Cisco, and Quantum Thinking.

The notion was simple: in a world where libraries are completely reinventing themselves, where universities and schools are moving away from labs to BYOD, and where the focus of everything seems to be on mobiles — what will be the role of technology in the next decade? What do leading institutions need to be doing now to prepare? What are the strategies that will provide them the most flexibility? The greatest competitive advantage?

Nine engaging speakers were interspersed between working sessions as David Sibbet, CEO of the Grove and the world's leading visual facilitator, led the group over the two days through discussions that started very broad, then funneled quickly to focus, and fostered strong consensus by the last day.

As the group of 100 moved from reflections and metalearnings from the last decade, to notions of renewal and transformation, to ultimately metatrends and action, thought leaders including Malcolm Brown, Lev Gonick, Lucy Gray, Øystein Johannessen, Larry Johnson, Susan Metros, Ruben Puentedura, Marsha Semmel, and John Weber provided six-minute thought pieces to engage the larger group. Videos of these talks, a wiki for further discussions, social media events, and a major report are planned outcomes of the event, as is this first communiqué about the gathering and the work that took place at the retreat.

Of key significance to the 100 thought leaders in attendance, and to the larger world of education as well were the in depth discussions that took place around the ideas of where technology is going. These ideas will also be the centerpiece of the coming report, and focused on understanding which technologies seem to be "sticky" and persist, and which are generative (in the sense of shaping perceptions that allow subsequent technologies to take traction) — and how to know one from the other.

A wide lens was aimed at the world around education, and that lens had a uniquely global focus. What interested the group — which represented 20 countries from six continents — was what trends are truly international? Which are impacting learning and education worldwide, from the most advanced countries to the poorest?

From these discussions, 28 hugely important metatrends were identified. The ten most significant are listed here and will be the focus of the upcoming *NMC Horizon Project 10th Anniversary Report*:

1. **The world of work is increasingly global and increasingly collaborative.** As more and more companies move to the global marketplace, it is common for work teams to span continents and time zones. Not only are teams geographically diverse, they are also culturally diverse.
2. **People expect to work, learn, socialize, and play whenever and wherever they want to.** Increasingly, people own more than one device, using a computer, smartphone, tablet, and e-reader. People now expect a seamless experience across all their devices.
3. **The Internet is becoming a global mobile network — and already is at its edges.** Mobithinking reports there are now more than 6 billion active cell phone accounts. 1.2 billion have mobile broadband as well, and 85% of new devices can access the mobile web.
4. **The technologies we use are increasingly cloud-based and delivered over utility networks, facilitating the rapid growth of online videos and rich media.** Our current expectation is that the network has almost infinite capacity and is nearly free of cost. One hour of video footage is uploaded every second to YouTube; over 250 million photos are sent to Facebook every day.
5. **Openness — concepts like open content, open data, and open resources, along with notions of transparency and easy access to data and information — is moving from a trend to a value for much of the world.** As authoritative sources lose their importance, there is need for more curation and other forms of validation to generate meaning in information and media.
6. **Legal notions of ownership and privacy lag behind the practices common in society.** In an age where so much of our information, records, and digital content are in the cloud, and often clouds in other legal jurisdictions, the very concept of ownership is blurry.
7. **Real challenges of access, efficiency, and scale are redefining what we mean by quality and success.** Access to learning in any form is a challenge in too many parts of the world, and efficiency in learning systems and institutions is increasingly an expectation of governments — but the need for solutions that scale often trumps them both. Innovations in these areas are increasingly coming from unexpected parts of the world, including India, China, and central Africa.
8. **The Internet is constantly challenging us to rethink learning and education, while refining our notion of literacy.** Institutions must consider the unique value that each adds to a world in which information is everywhere. In such a world, sense-making and the ability to assess the credibility of information and media are paramount.
9. **There is a rise in informal learning as individual needs are redefining schools, universities, and training.** Traditional authority is increasingly being challenged, not only politically and socially, but also in academia — and worldwide. As a result, credibility, validity, and control are all notions that are no longer givens when so much learning takes place outside school systems.
10. **Business models across the education ecosystem are changing.** Libraries are deeply reimagining their missions; colleges and universities are struggling to reduce costs across the board. The educational ecosystem is shifting, and nowhere more so than in the world of publishing, where efforts to reimagine the book are having profound success, with implications that will touch every aspect of the learning enterprise.

These metatrends are the first of much yet to come in the next year. Watch NMC.org for news and more throughout the Horizon Project's 10th Anniversary. To be part of the discussions, follow #NMChz!