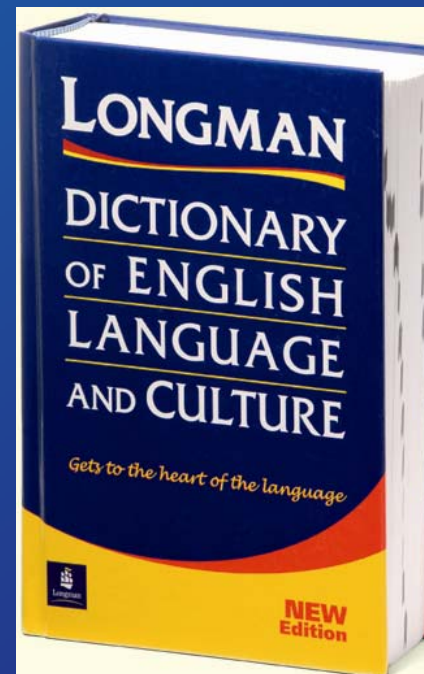
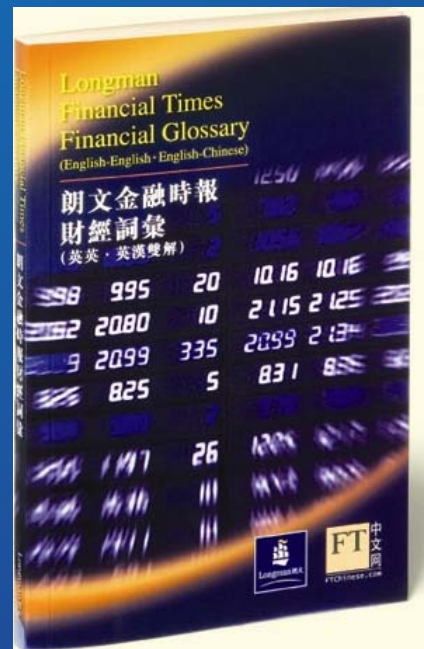
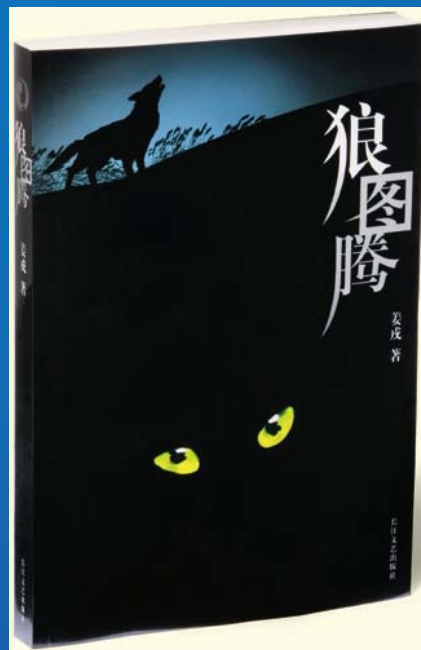




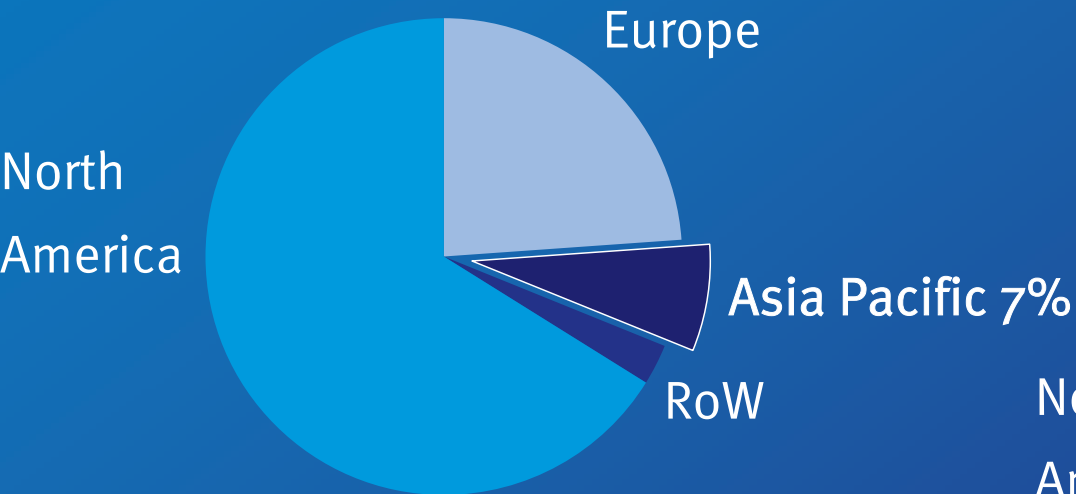
Pearson in Asia

30 March 2006



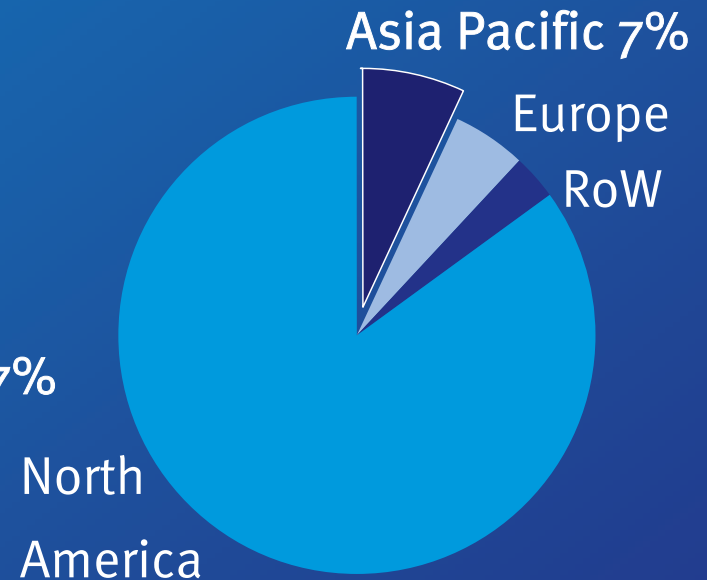
Pearson in Asia (2005)

Sales



Group: \$7,045
Asia: \$516 million

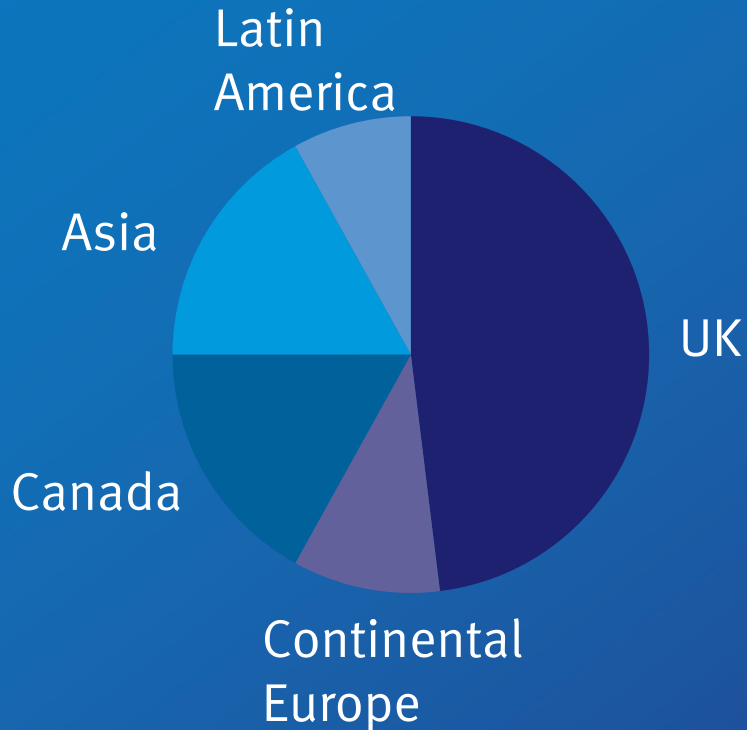
Adjusted operating profit



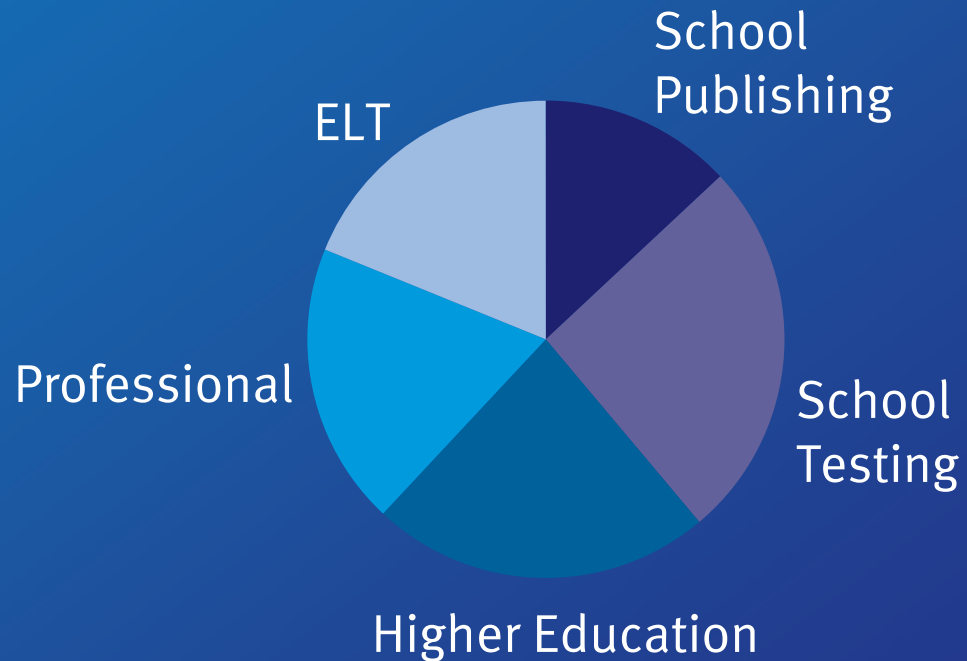
Group: \$875m
Asia: \$64 million

Pearson Education International

By region



By product



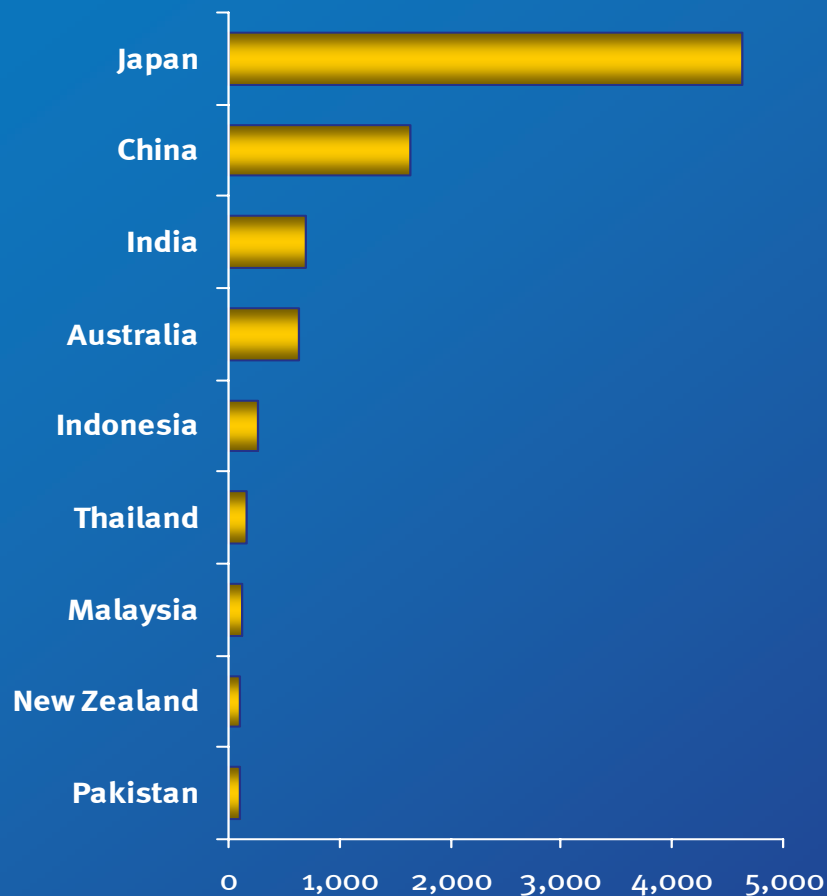
2005 sales: \$1.4 billion

Economic and demographic landscape

Mix of developed and developing economies

GDP

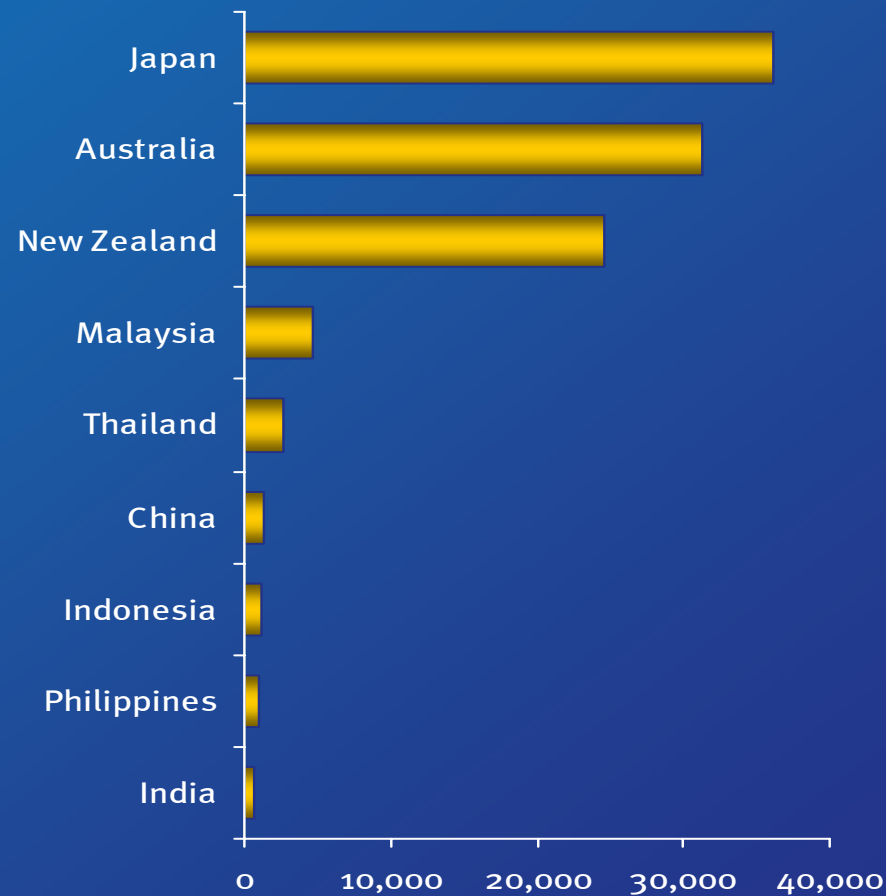
\$bn, 2004A



Source: UNESCO

GDP per capita

\$, 2004A

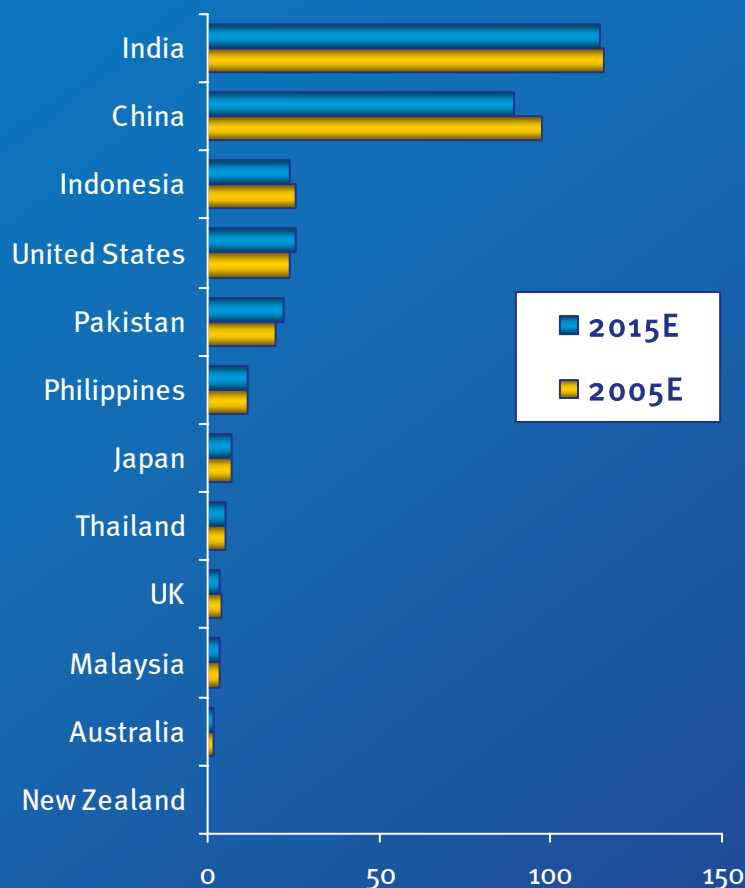


Source: UNESCO

School age population

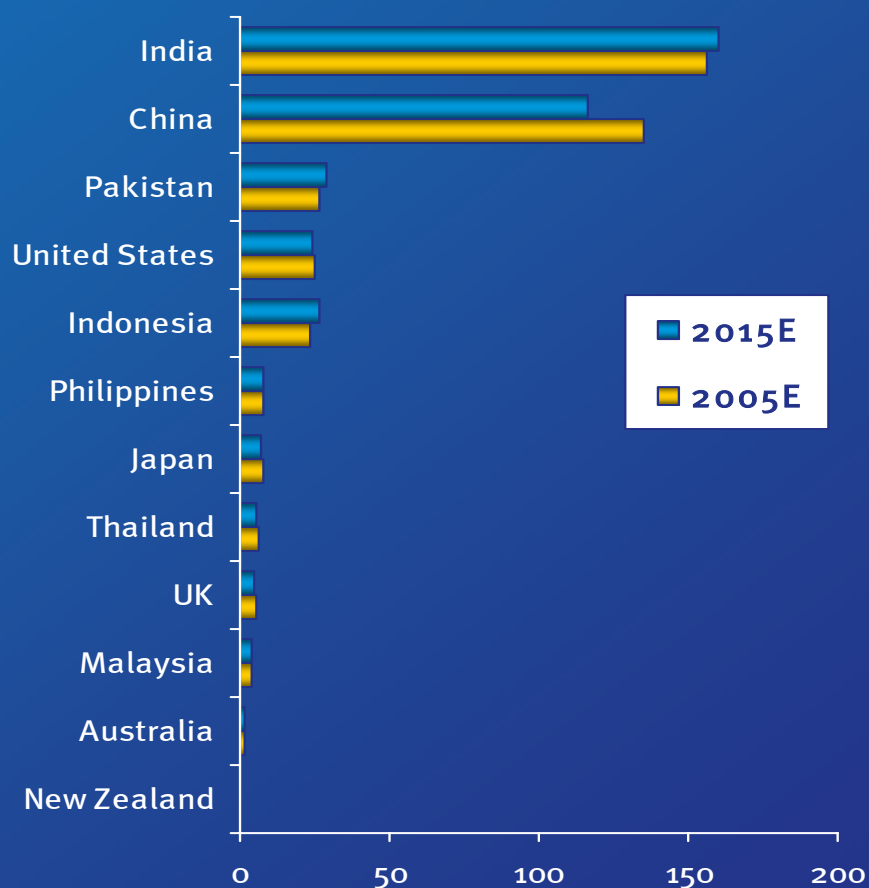
Vast addressable market, shifting demographics

Number of children of primary age
million



Source: World Bank

Number of children of secondary age
million



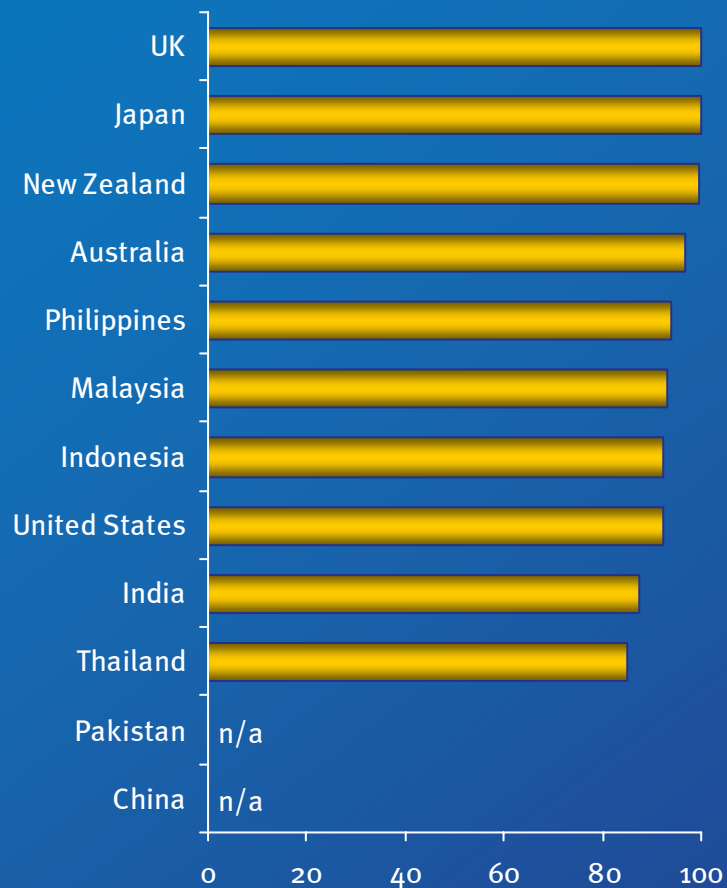
Source: World Bank

Participation rates

High in primary, growth to come in secondary

Primary participation rates, 2002

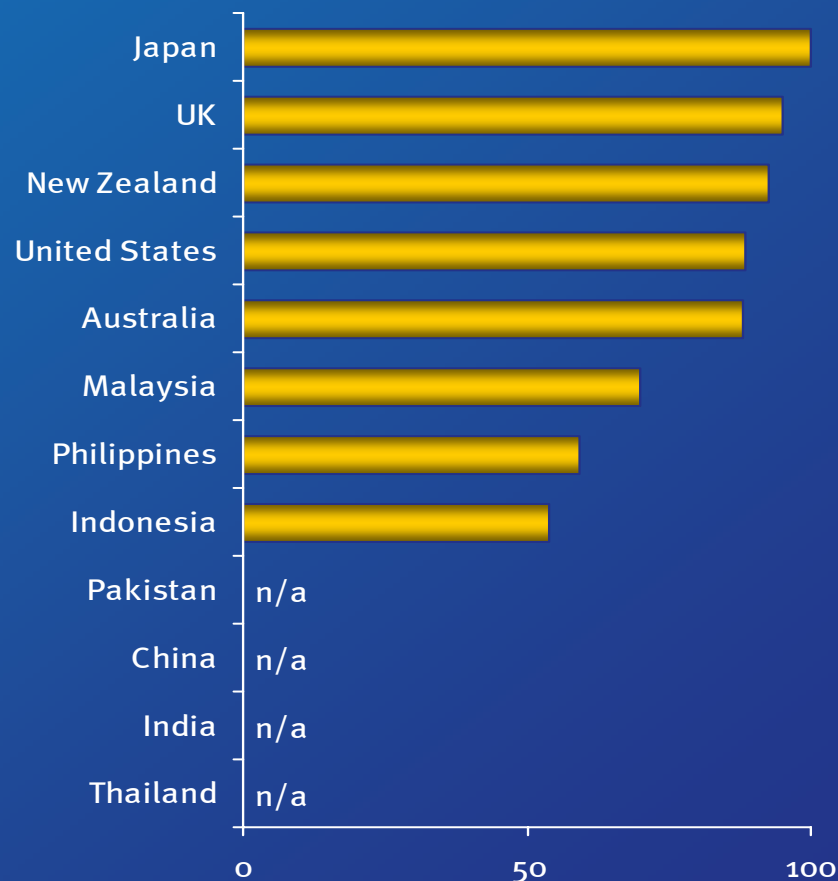
% of primary pop. in primary school



Source: UNESCO

Secondary participation rates, 2002

% of secondary pop. in secondary school

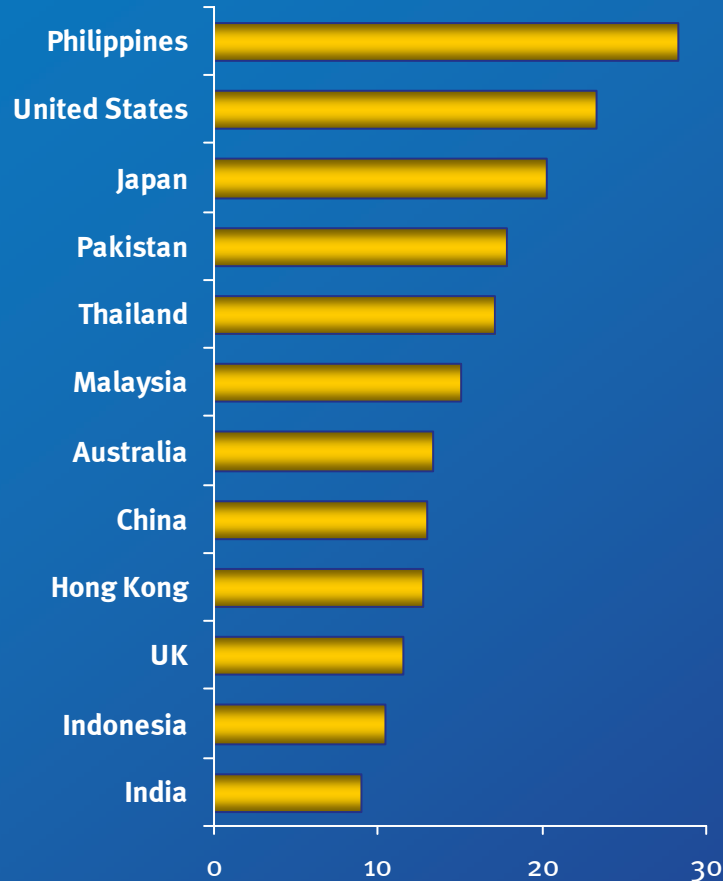


Source: UNESCO

Government expenditure on education

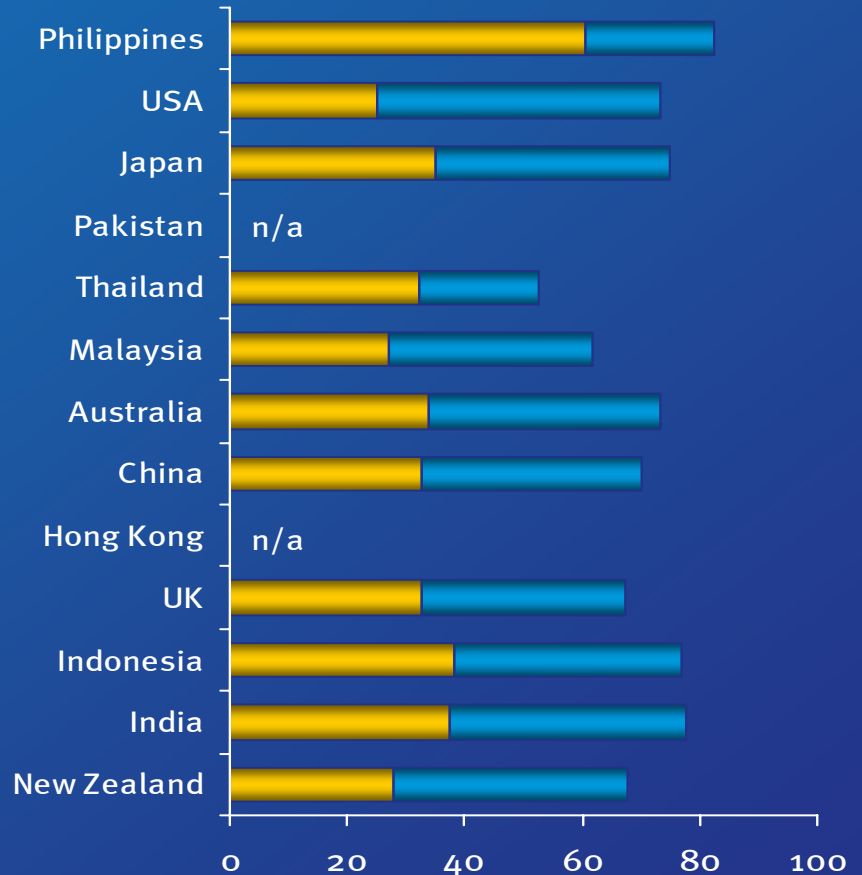
Growth in absolute spend and secondary participation key

Education exp. as % of govt. exp.
% of most recent data



Source: UNESCO

Primary vs Secondary exp.
% of education expenditure

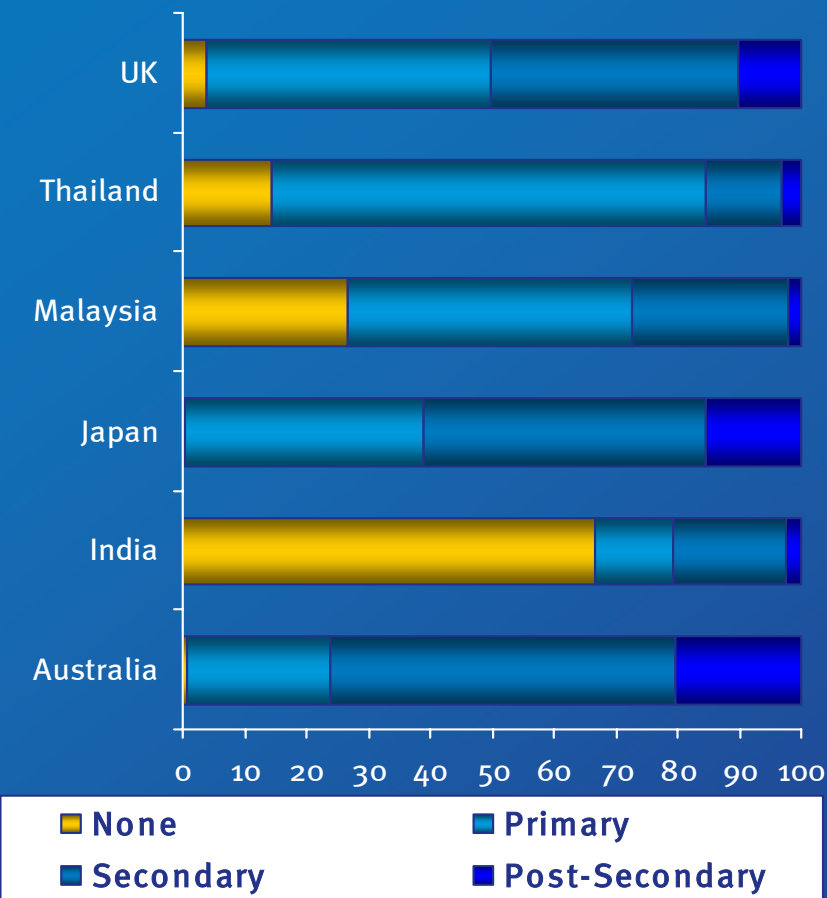


Source: UNESCO

Educational attainment

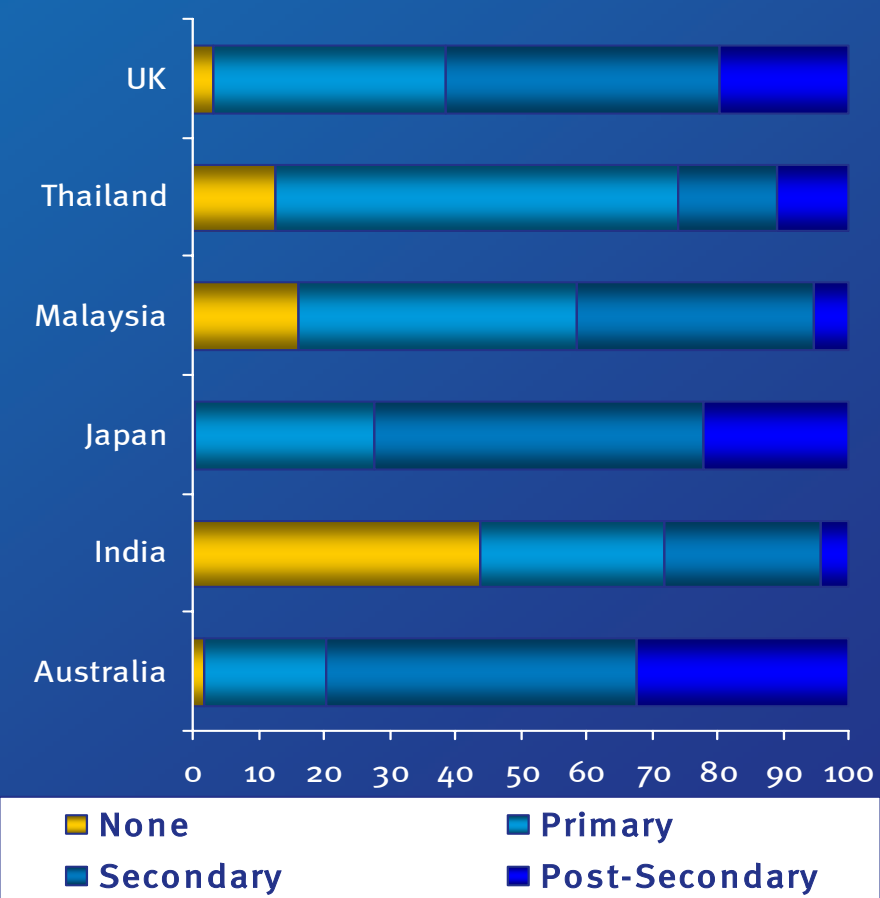
Education levels are rising

Highest level of education achieved
Proportion of adults aged 15+ (1980)



Source: World Bank

Highest level of education achieved
Proportion of adults aged 15+ (2000)

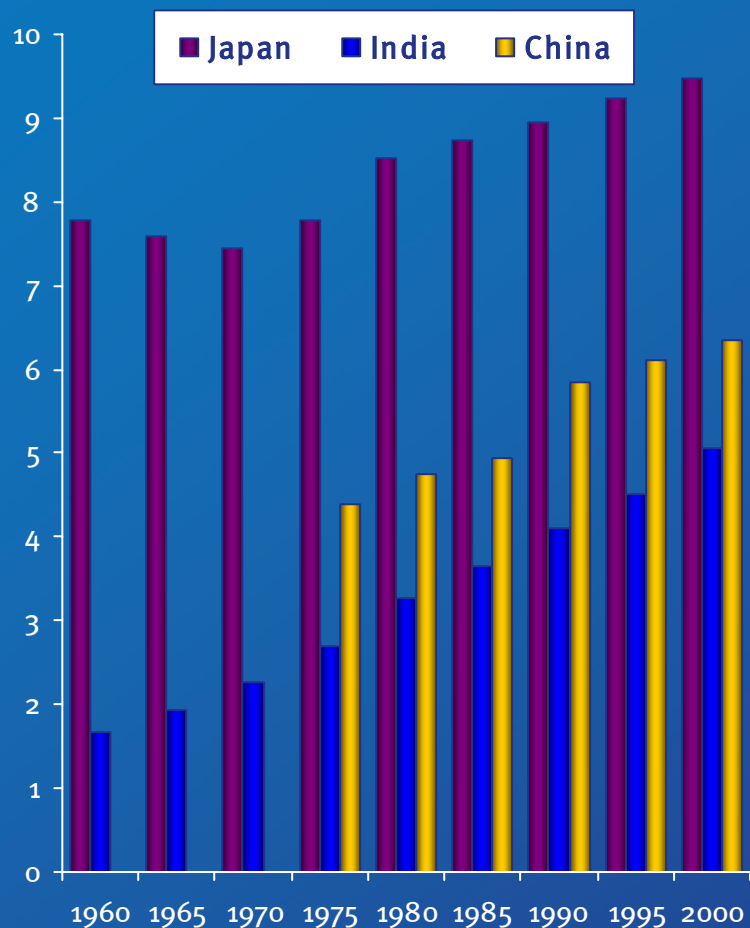


Source: World Bank

Schooling and literacy

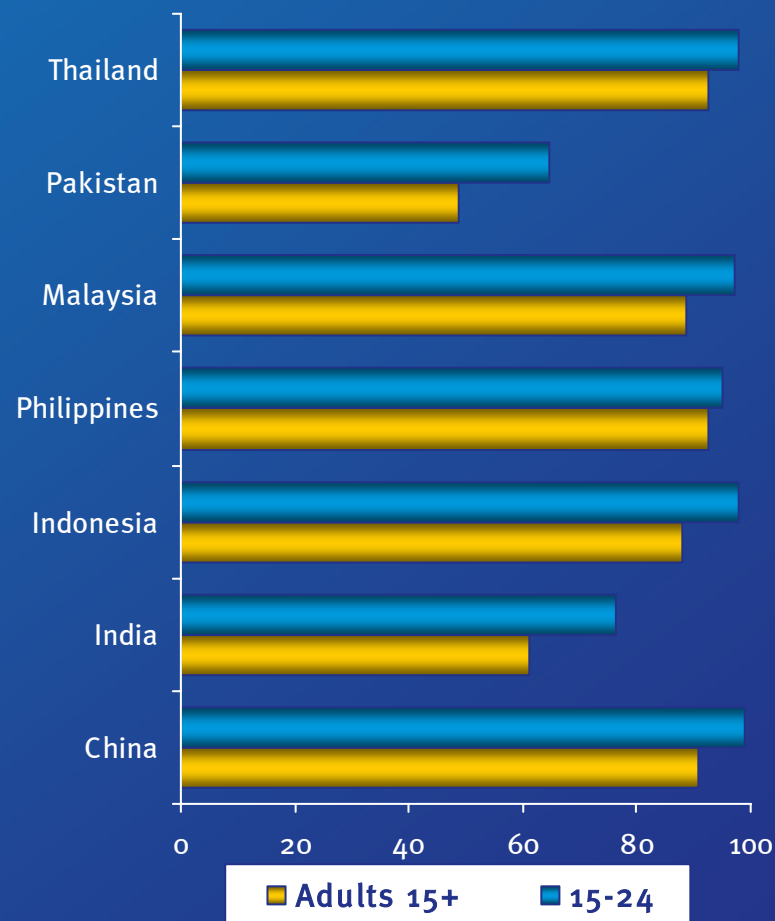
Time spent in school and literacy rising

Average number of years in school



Source: World Bank

Adult literacy



Source: World Bank

Pearson in Asia



- Kiriwara Shoten (Japan)
- WFOE (Shanghai)
- Co-publishing MOE
- Pearson VUE
- Edexcel



- Hong Kong Asia hub
- 13 regional bureaux
- 5 regional print sites
- Beijing rep office



- Beijing rep office
- India: English language and new regional publishing
- DK: 80—100 title pa
- Partnerships
- World-wide rights for China (eg. Wolf Totem)

One Pearson

- Financial training
- Government relations
- Shared services
- Group out-sourcing
- Joint publishing
- Content exchange
- Infrastructure-distribution

Production and services initiatives in Asia

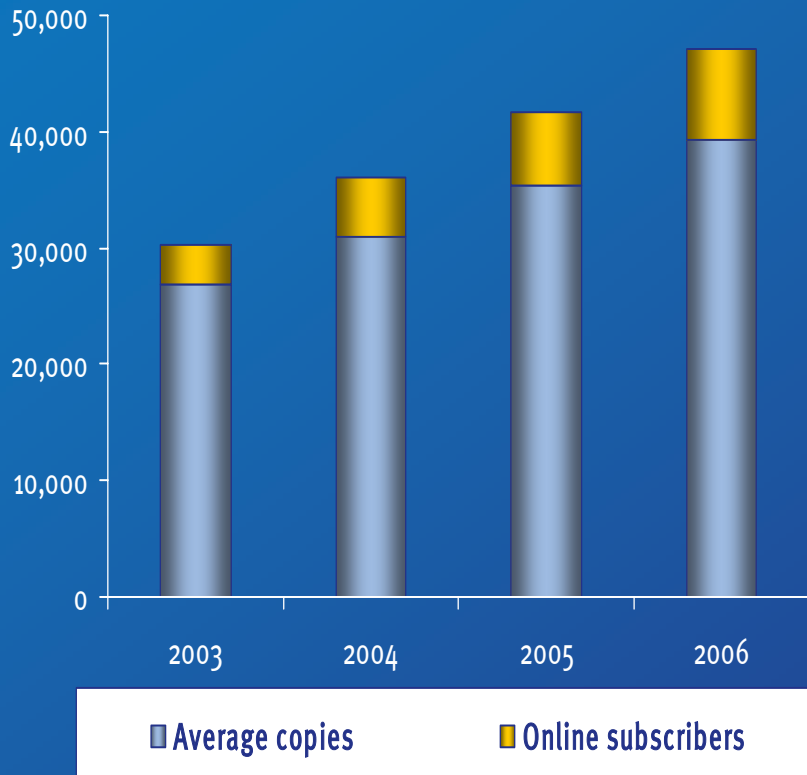
- School, Higher Education and DK pre-press operations
- Pearson Education and DK printing
- School technology product development
- Back office, transaction and IT Services

\$100m+ of production, printing and services sourced in Asia

FT Asia

Gaining share in print and online

FT Asia print and online subs
Year end subscribers



Source: Pearson

Winning readership
Average issue readership



Source: Pearson

Republishing – Revenues, take 2





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首席经济评论员沃尔夫：中国的出口让世界其它国家更富裕了，但并不意味每个国家的状况都得到了改善。一个国家与中国的比较优势越相似，就越有可能遭受损失。

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受到影响的包括北京证券和广发银行股权收购交易

- 中国必须“立即开放市场”
- 中国银行业风光的背后

■ 人民币对美元汇率创去年7月以来单日涨幅新高

- 昨日升幅达0.12%，至8.0377比1
- 人民币升值无助于缓解美国逆差
- 白宫将贸易逆差部分归咎于中国

■ 中航油前CEO在新加坡认罪 预计新加坡一法院下周将批准中航油的债务重组计划

- 中航油丑闻的启示
- 中航油前CEO在新加坡认罪

■ 新日本石油公司减少进口伊朗石油

担心伊朗核问题可能造成供应问题

■ Google计划在欧洲建“虚拟超市” (独家新闻)

为传统的零售商提供一个网上营销平台

- Google还能“牛”多久?

新闻聚焦



朝鲜的红色老板

金正日政府现在正鼓励成立大企业集团，自强会社社长金成勋就是朝鲜式商人的旗手人物，但他拒绝有关朝鲜正日益采用市场原则的任何说法。

传媒大佬



BBC的互联网扩张雄心

英国广播公司新闻网站是全球访问量第六高的新闻网站，紧随Google新闻之后，但它还不满足，希望筹集巨额资金拓展数码媒体科技，并为国际扩张制定战略。

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赞助商链接: 双核演示

社评



中国需要更多改革

中国存在许多问题。但是，反对改革的人没有提供、也拿不出什么解决办法，因为他们的诊断是完全错误的。解决中国的问题，需要进一步推动市场改革。

“两会”点评



中国经济改革
“不进则退”

FT首席亚洲事务评论员容凯尔：中国改革开放25年后，传统增长模式弊端渐显。有人主张走老路，但这显然行不通。出路在哪里？

《中国楼市》

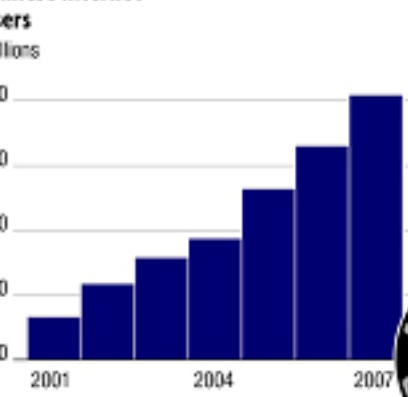


“捍卫”你的房子

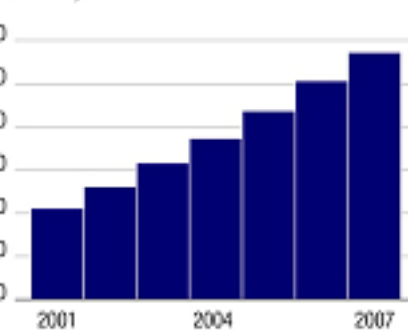
on off



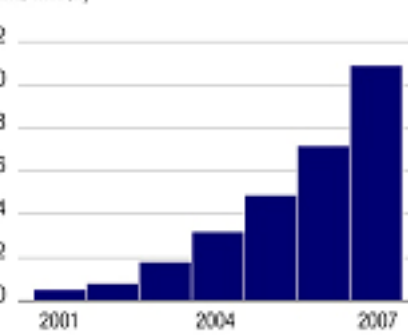
Chinese internet
users
billions



Total advertising
revenue in China
(billion million)



Online advertising
revenue in China
(billion million)

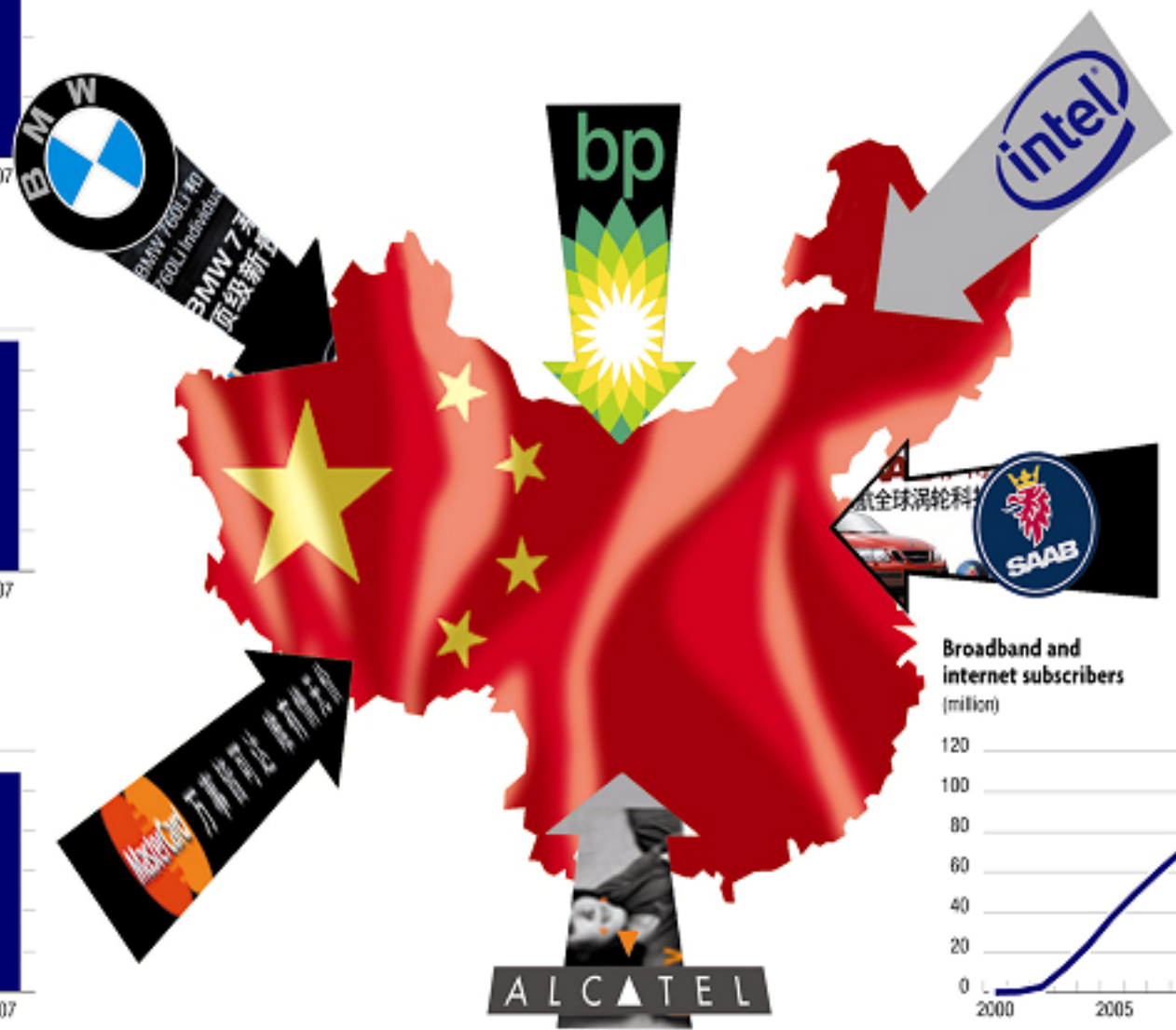


THE CHINA MARKET;

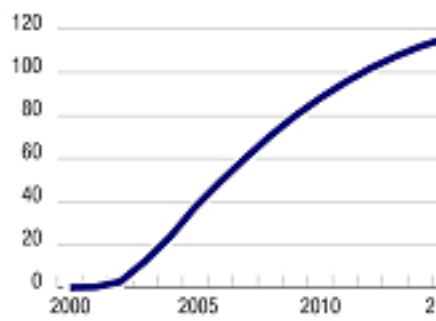
ADVERTISING, BRANDS AND THE INTERNET

FDI flows

2002	2003	2004	2005
\$46bn	\$50bn	\$52bn	\$52bn



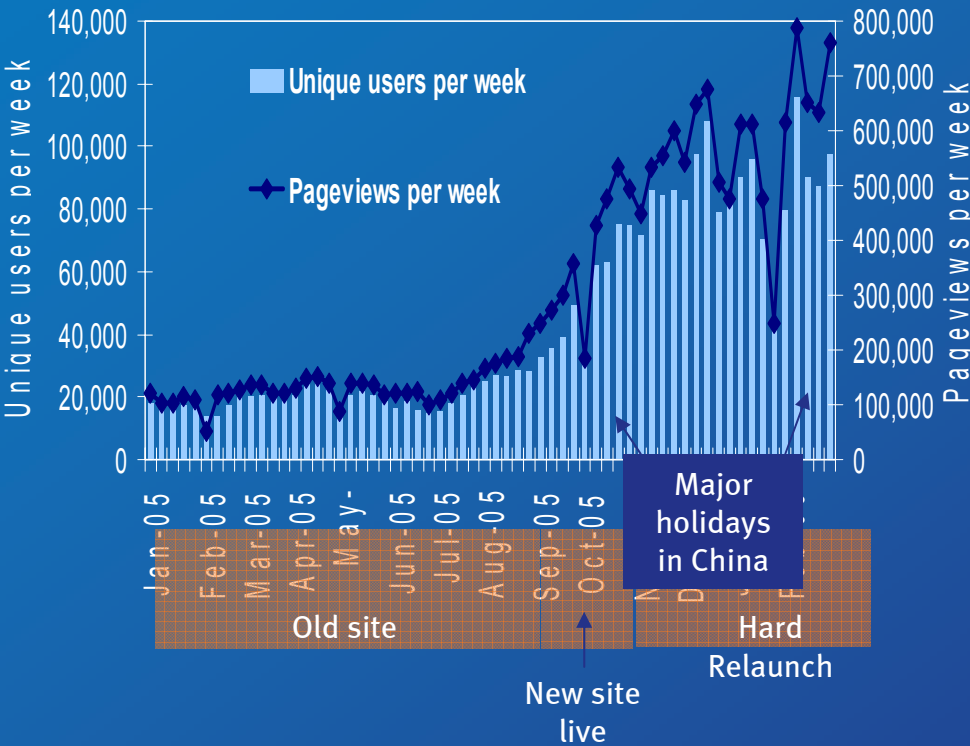
Broadband and
internet subscribers
(million)



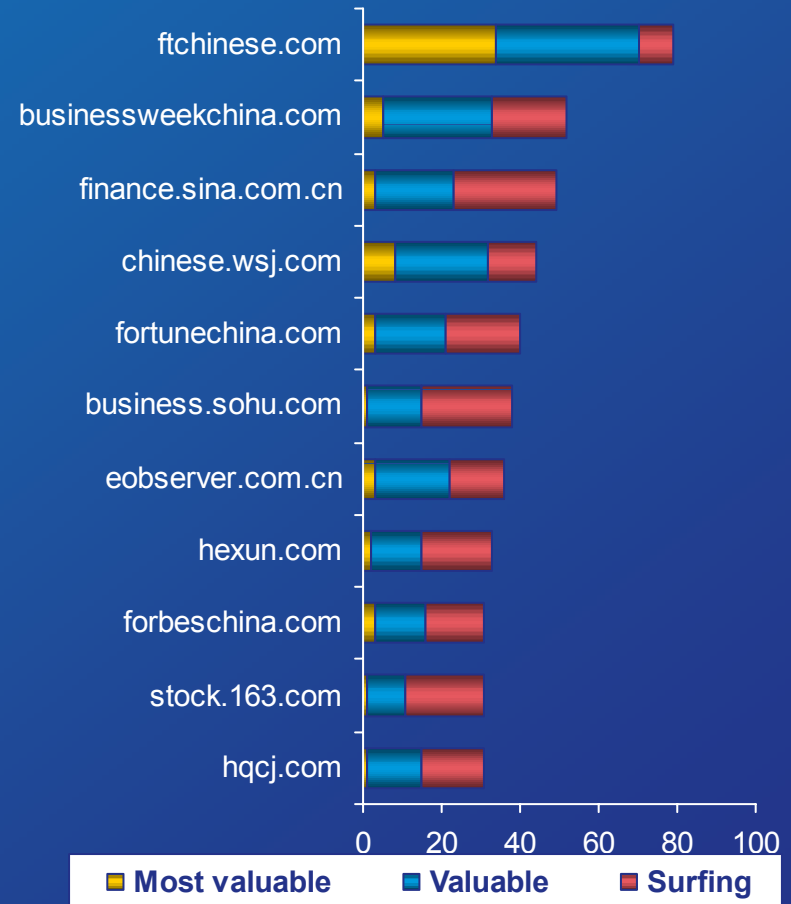
FT China

Breaching the Great Wall

FT China users and page views



Most valuable business sites



Source: Pearson

Source: Pearson