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Learning Services: Transforming the Way the Workplace Learn

Market Analysis
Abstract

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Who Is This Report For?

NelsonHall's "Learning Services: Transforming the Way the Workplace Learns" report is a comprehensive market assessment report designed for:

- Sourcing managers investigating sourcing developments within learning services outsourcing

- HR decision makers exploring the benefits and inhibitors of learning services outsourcing as evidenced by the clients and vendor capability

- Vendor marketing, sales and business managers developing strategies to target BPO service opportunities within learning services outsourcing

- Financial analysts and investors specializing in the IT services and BPO sector, including learning services outsourcing.

Scope of the Report

The report analyzes the worldwide market for learning services outsourcing and addresses the following questions:

- What is the market size and projected growth for the global learning services market by geography?

- What is the profile of activity in the global learning services market by industry sector?

- What are the top drivers for adoption of learning services outsourcing?

- What factors are inhibiting successful learning services outsourcing partnerships with vendors?

- Who are the leading learning services vendors globally and by geography?

- What combination of service models/services are typically provided within learning services contracts and what new service models/services are being added?

- What is the current pattern of delivery location used for learning services and how is this changing?

- What are the challenges and success factors within learning services outsourcing?

Key Findings & Highlights

NelsonHall's market analysis of the Learning Services Outsourcing industry and trends consists of 124 pages.

2019 is predicted to see ~3.5% growth in Learning Services activity (a mix of new learning contract wins, and expansions of existing learning contracts).

PESTLE factors are impacting the Learning Services space in 2019. These include political factors: concern about the impact of Brexit is stalling organizations' decisions to spend budget on big-ticket items such as learning services that span the U.K. and Europe. Economic factors (such as a potential global recession and more cautionary spending) have impacted organizations' buying habits, such that they are buying services one by one (or in small bundles) rather than outsourcing learning services fully. In an era of social media characterized by collaborative, consumerized, and personalized experiences, learners want to learn what they want, at their own pace, at a time to suit them, and in their preferred location. The range of learning technology/tools on the market is so vast that organizations need the support of experts to help them navigate their potential choices while meeting the needs of increasingly mobile and social learners.

Vendors continue to offer a mix of learning services, reflecting the make-up of their learning clients and their individual needs. Additionally, market factors drive the popularity of some services over others. In 2019, clients mostly demand learning content services, learning delivery services, and learning administration services. Demand for learning technology services is growing (with interest in shifting to digital learning), and consultancy services are growing where vendors actively promote learning transformation.

Developments in learning technology/tools have focused on personalization, consumerization, and appification (being mobile-first) to drive a unique learning experience. Learners want an immersive experience (and clients want engaged learners), so the use of VR, AR, gamification, and simulations, is now commonplace. Having bite-sized content, accessible anytime, anywhere, on any device is also essential. There is a drive towards adaptive learning, using advanced analytics and algorithms to provide just-in-time learning.

In a bid to save cost for clients, vendors offshore activities such as learning administration, some content development work, and testing. Automation is being leveraged more in learning services delivery, with administrative processes being the first to be automated. Beyond the traditional service support centers, some vendors offer training facilities (campuses), digital reality experience studios, and connected learning classrooms. The long-term survival of this infrastructure will be determined by how learning services develop in future years. Still, some types of infrastructure will have a shorter lifespan, as digital learning evolves.

Contents

Report Length

124 pages, consisting of 7 chapters and five appendices

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Vendor Assessments

The report includes vendor assessments of the following learning services vendors:

- Accenture

- Capgemini

- Conduent

- G-Cube

- GP Strategies

- Infopro Learning

- Infosys BPM

- Learning Tribes

- MPS Interactive

- NIIT Ltd

- Raytheon Professional Services

- The Learning Factor

- Upside Learning

- UpsideLMS.