



Targeting Learning Business Process Outsourcing

Market Analysis
Abstract

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Who Is This Report For?

NelsonHall's "Targeting Learning Process Outsourcing" report is a comprehensive market assessment report designed for:

- Sourcing managers investigating sourcing developments within learning BPO
- HR decision makers exploring the benefits and inhibitors of learning BPO as evidenced from the clients and vendor capability
- Vendor marketing, sales and business managers developing strategies to target BPO service opportunities within learning
- Financial analysts and investors specializing in the IT services and BPO sector, including learning BPO

Scope of the Report

This report analyzes the global market for Learning Business Process Outsourcing (LBPO) and its constituent services. The report addresses the following questions:

- What is the current and future market for learning BPO services?
- What are the customer requirements and how are they changing?
- What are the benefits / results vendors have been able to achieve for their clients?
- What services are customers buying from learning BPO vendors?
- What technologies and platforms are being utilized and what are the latest developments and trends emerging?
- What is the size and growth of the learning BPO market by geography?
- What is the size of the learning BPO market by industry and which is seeing increased demand? What is the size by small, mid and large market?
- How leading vendors are positioned within the learning BPO outsourcing market?
- What are the vendor selection criteria, challenges and critical success factors for vendors targeting learning BPO?
- Additional topics include: the advent of social learning, acquisitions and partnerships, proportion of revenue by learning tower by region and multi-process HRO (MPHRO) provider and learning specialist, vendor revenue per FTE by region and MPHRO provider and learning specialist, who is leading the discussion to outsource learning, use of offshoring, contract lengths and pricing, etc.



Key Findings & Highlights

NelsonHall's market analysis of the Learning BPO industry and LBPO trends consists of 92 pages.

Selective LBPO contracts continue to outnumber full LBPO contracts but there has been a resurgence in full LBPO contracts since mid-2012. Selective LBPO continues to increase, including for content development, delivery of training, learning administration and technology.

Clients are investing in learning at the highest level since before the recession began. There is an appetite for full LBPO contracts, but selective LBPO continues to increase at a higher rate across all learning towers, led by content development due to the conversion of instructor-led training (ILT) to e-learning. E-learning began to exceed ILT for the first time in 2012 and continues to accelerate, particularly for quick deployment of learning for geographically dispersed organizations and reduction of cost. Due to the shortage of talent caused by a skills gap in supply, talent development has increased in importance. Clients are seeking the help of specialists to attract, develop and retain talent. Vendors are helping, including by making the linkage of learning to performance management and developmental plans, both from a consultative and technological standpoint.

Cost continues to be a top driver of learning BPO as many client organizations decimated their HR departments during the recession. Though outsourcing is a less costly alternative than rebuilding internally, clients are looking to reduce cost while improving service delivery at the same time. NelsonHall has identified eight top learning BPO drivers, along with the associated top fifteen top sub-drivers, in the report.

Acquisitions continue, led by strengthening of learning services capability and expansion of geographic capability.

LBPO contract lengths are consistent with 2012 but down from 2010, due to client uncertainty and desire to reduce their risk.

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Vendors Mentioned in the Report Include

Accenture Learning Services, Aon Hewitt, Aptara, Capita, Cognizant, Expertus, Genpact, GP Strategies, IBM Global Services, Infosys, Intrepid Learning Solutions, KnowledgeAdvisors, KnowledgePool, HCL, Mahindra Satyam, Neeyamo, NIIT, NorthgateArinso, QA, Raytheon Professional Services, Seertech Solutions, Talent2, The Learning Factor, TrainingFolks, Wipro, Xerox and others.

Vendor Assessments Include

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- GP Strategies
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- Infosys
- Intrepid Learning Solutions
- NIIT
- QA
- Raytheon Professional Services
- Talent2
- The Learning Factor
- Xerox

Report Length

92 pages, consisting of 7 chapters

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