Moving Toward the New Era of Corporate Learning – Learning Services Market Report 2020

September 2020: Complimentary Abstract / Table of Contents

Our research offerings for global services

▶ **Market Vista™**
Global services tracking across functions, sourcing models, locations, and service providers – industry tracking reports also available

▶ Application Services	▶ Finance & Accounting
▶ BPS | Banking & Financial Services	▶ Human Resources
▶ BPS | Healthcare & Life Sciences	▶ ITS | Banking & Financial Services
▶ BPS | Insurance	▶ ITS | Healthcare
▶ Catalyst™	▶ ITS | Insurance
▶ Cloud & Infrastructure	▶ IT Services Executive Insights™
▶ Customer Experience Management Services	▶ ITS | Life Sciences
▶ Contingent Workforce Management	▶ Locations Insider™
▶ Data & Analytics	▶ PricePoint™
▶ Digital Services	▶ Procurement
▶ Engineering Services	▶ Recruitment Process Outsourcing
▶ Enterprise Platform Services	▶ Service Optimization Technologies

Membership information

- This report is included in the following research program(s)
  – Human Resources
- If you want to learn whether your organization has a membership agreement or request information on pricing and membership options, please contact us at **info@everestgrp.com**

More about membership

In addition to a suite of published research, a membership may include
- Accelerators™
- Analyst access
- Data cuts
- Pinnacle Model® reports
- PriceBook
- Virtual Roundtables
- Workshops

Custom research capabilities

- Benchmarking | Pricing, delivery model, skill portfolio
- Peer analysis | Scope, sourcing models, locations
- Locations | Cost, skills, sustainability, portfolio – plus a tracking tool
- Tracking services | Service providers, locations, risk
- Other | Market intelligence, service provider capabilities, technologies, contract assessment

Contents

For more information on this and other research published by Everest Group, please contact us:

Anil Vijayan, Vice President

Priyanka Mitra, Practice Director

Ravjot Sachdeva, Senior Analyst

Contents

Background of the research

Many organizations are looking to undergo digital transformation to enhance their business outcomes. The potential of these next-generation technologies can be fully realized only if an organization's employees are ready to embrace these changes. The learning services market is witnessing an increasing demand for these services from buyers of all sizes. The factors responsible for this rising demand are the need to upskill and reskill employees in line with the changing business needs, and simultaneously enhance employee engagement to increase productivity. The learning services market continues to grow at a significant pace as more buyers look to outsource parts of their learning & development activities to providers

In this report, we analyze the trends, drivers, and key investment themes of the learning services market. We focus on:

- Key changes that talent managers have been facing over the years
- Service providers' response to those changes and the key investment themes in the market
- Analysis of the market in terms of industry, geographic segments, and key adoption trends among enterprises

Scope of this report:

Geography	**Industry**	**Services**	**Use cases**
Global	Cross-industry	Learning services	This report uses information provided by service providers through the RFI process as well as publicly available information

Everest Group® RESEARCH

Overview and abbreviated summary of key messages

This report examines the global 2019 learning service market in detail. It focuses on service provider position and growth in the HRO market, changing market dynamics and emerging service provider trends, assessment of service provider delivery capabilities, and key HRO service provider profiles. It also identifies the key implications of the research findings for buyers and service providers.

Some of the findings in this report, among others, are:

Market overview

- The learning services market grew at an impressive CAGR during 2018-19 driven by increasing global adoption across different verticals and processes. The market, however, may experience a decline in growth in 2020 due to the impact of COVID-19
- North America is the most mature geography by learning services adoption, followed by Europe-UK and Asia Pacific
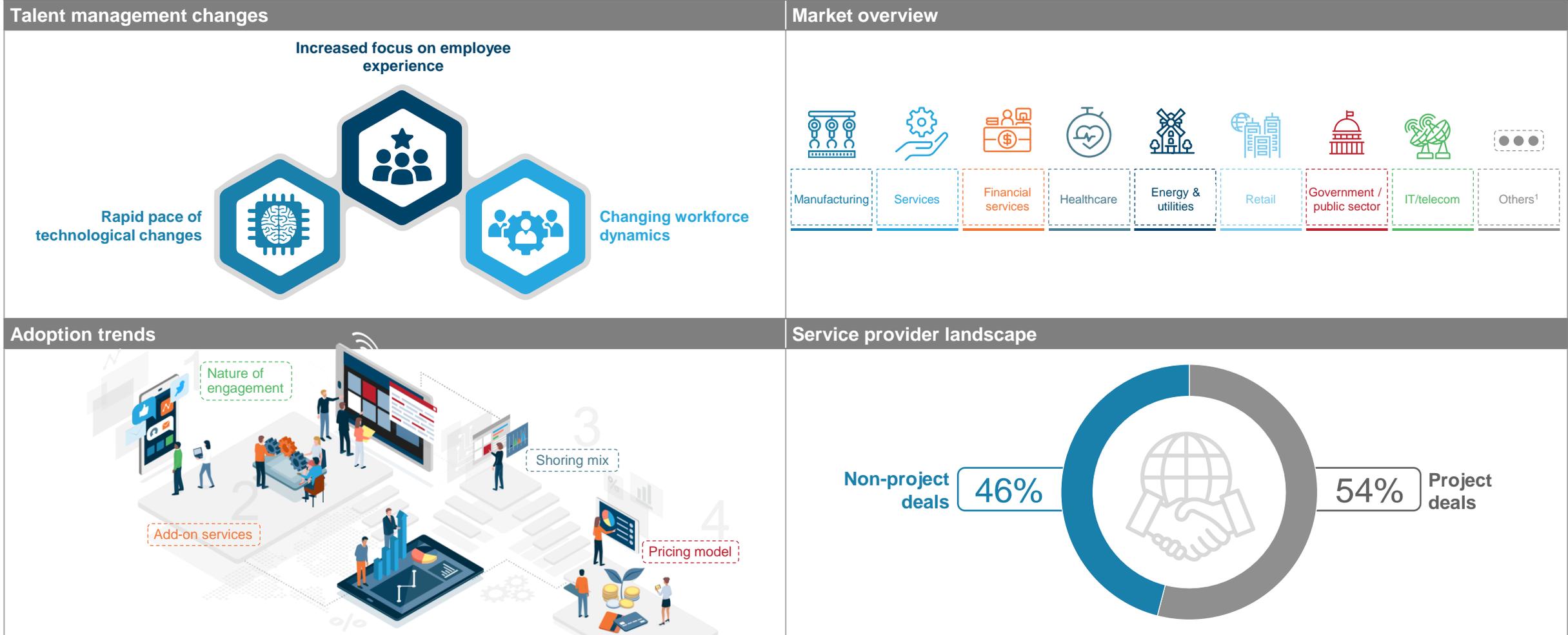
Adoption trends

- Organizations are looking to digitize their learning activities through next-generation solutions such as RPA, advanced analytics, and AI
- The market is primarily tilted toward project-based engagements due to the high demand for content services, which are often short-term in nature
- There are multiple pricing models used in learning services – the most adopted model currently is input-based pricing

Service provider landscape

- The learning services market has two broad categories of providers – pure-play learning services providers and broad-based BPS providers that provide learning services. They generally differ in their approach to targeting learning services clients
- Providers such as GP Strategies and Raytheon have been successful in winning a significant share of the learning services market due to their end-to-end service coverage, wide suite of learning offerings, and key large clients across industries
- Broad-based BPS providers such as Accenture, Capgemini, and Conduent have been performing well in the market by enhancing their learning services coverage and partnering with innovative learning technology vendors

This study offers four distinct chapters providing a deep dive into key aspects of the learning services market; below are four charts to illustrate the depth of the report

Talent management changes

Increased focus on employee experience

Rapid pace of technological changes

Changing workforce dynamics

Market overview

Manufacturing	Services	Financial services	Healthcare	Energy & utilities	Retail	Government / public sector	IT/telecom	Others[1]

Adoption trends

Nature of engagement

Shoring mix

Add-on services

Pricing model

Service provider landscape

Non-project deals 46%

54% **Project deals**

Research calendar – Human Resources Outsourcing (HRO)

■ Published ▨ Planned ■ Current release

Flagship HRO reports	Release date
Rewards and Recognition (R&R) Solutions PEAK Matrix® Assessment with Service Provider Landscape 2020	April 2020
Digital Adoption Platform (DAP) Products PEAK Matrix® Assessment with Service Provider Landscape 2020	July 2020
Learning Services PEAK Matrix® Assessment with Service Provider Landscape 2020	June 2020
Learning Services Provider Profile Compendium	August 2020
Digital Adoption Platform (DAP) Products Provider Profile Compendium 2020	August 2020
Moving Toward the New Era of Corporate Learning – Learning Services Market Report	**September 2020**
Multi-country Payroll (MCP) Solutions PEAK Matrix® Assessment with Service Provider Landscape 2020	Q3 2020
Multi-country Payroll (MCP) Solutions Annual Report 2020	Q3 2020
Multi-country Payroll (MCP) Solutions Service Provider Profile Compendium 2020	Q3 2020
Multi-process Human Resources Outsourcing (MPHRO) Services PEAK Matrix® Assessment with Services Provider Landscape 2020	Q4 2020
Multi-process Human Resources Outsourcing (MPHRO) Annual Report 2020	Q4 2020
Multi-process Human Resources Outsourcing (MPHRO) Service Provider Profile Compendium 2020	Q4 2020

Thematic HRO reports	Release date
Learning Function of the Future	December 2019
Digital Adoption Platform (DAP): Accelerating the Journey from Transformation to Adoption	February 2020
Impact of Recession on the Business Process Services (BPS) Industry	March 2020
Price trends in HRO	September 2020

Note: For a list of all our published HRO reports, please refer to our website page

Everest Group®

With you on the journey

Everest Group is a consulting and research firm focused on strategic IT, business services, engineering services, and sourcing. Our clients include leading global enterprises, service providers, and investors. Through our research-informed insights and deep experience, we guide clients in their journeys to achieve heightened operational and financial performance, accelerated value delivery, and high-impact business outcomes. Details and in-depth content are available at **everestgrp.com**.

Stay connected

Website
everestgrp.com

Social Media

🐦 @EverestGroup

in @Everest Group

f @Everest Group

▶ @Everest Group

Blog
everestgrp.com/blog

Podcast
DigitalReal**IT**y

Listen on Apple Podcasts | Google Play | STITCHER | TUNE IN

Dallas (Headquarters)
info@everestgrp.com
+1-214-451-3000

Bangalore
india@everestgrp.com
+91-80-61463500

Delhi
india@everestgrp.com
+91-124-496-1000

London
unitedkingdom@everestgrp.com
+44-207-129-1318

New York
info@everestgrp.com
+1-646-805-4000

Toronto
canada@everestgrp.com
+1-416-388-6765