

HR & Talent Transformation

Learning Services: Employee Lifetime Skilling

Report Abstract

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Contents of Full Report

1. The Changing Shape of Learning Services
2. Customer Requirements
3. Market Size and Forecast
4. Vendor Market Shares
5. Vendor Offerings and Targeting
6. Vendor Delivery
7. Vendor Capability Profiles
8. Challenges and Success Factors
9. Appendix I: Abbreviations and Definitions
10. Appendix II: Pricing Mechanisms of Vendors
11. Appendix III: Examples of SLAs and KPIs
12. Appendix IV: Vendor Developments in Proprietary Learning Platforms
13. Appendix V: Third-Party Tech Used
14. Appendix VI – Vendors Researched

Who is This Market Analysis For?

NelsonHall's Learning Services report is a comprehensive market assessment report designed for:

- Sourcing managers investigating sourcing developments within the Learning Services market
- Vendor marketing, sales, and business managers developing strategies to target Learning Services
- Financial analysts and investors specializing in the Learning Services sector.

Key Findings & Highlights

Future-proofing the workforce through skilling and the global impact of AI/GenAI are the most talked-about subjects in learning services. Organizations recognize the need to take skilling action and are keen to embrace the benefits that AI/GenAI can bring to the workforce, but they face a dichotomy: they know what they would like to do long-term, but ongoing budgetary constraints curtail their ambitions, so they can only act on their most pressing needs, taking a short-term view.

There is optimism that the learning services market will take an upturn in 2025 after several subdued years. Organizations are keen to leverage strong partnerships with learning services vendors who will help them to navigate their future skilling and technology challenges and overcome their barriers to learning by providing expertise and relevant solutions, safe in the knowledge that the vendors will be investing in the latest skilling/content services, AI/GenAI, and developing market knowledge.

The future world of work is Human+AI centric. Vendors are building their offerings around this concept, with frameworks to support organizations in transitioning to this new era. Learning services vendors are investing much time and effort in helping organizations put the skilling and digital foundations in place to build a sustainable, prosperous, long-term future. New and revamped skilling content/programs, notably for functional and job-related learning, prioritize the development of soft and digital skills aligned to the future of work.

The evolution and investment in AI/GenAI have transformed learning services and technology, making unprecedented advances in one year beyond market expectations. Adding more sophisticated AI/GenAI-enabled features and functionality to learning platforms has enabled the timely provision of hyper-personalized, contextualized, and experiential skilling content for learners, transformed content creation times, learning admin, and delivery, with AI assistants undertaking much of this work. Learning services vendors continue to develop robust roadmaps for AI/GenAI and their learning solutions.

The pace of skilling and digital (including AI/GenAI) change will quicken over time, requiring more intensive and ongoing investment in learning and talent development to keep up. Vendors and organizations cannot underestimate the effort that will be required. They will need unprecedented flexibility, agility, and resiliency to survive.

Scope of the Report

The report analyzes the worldwide market for Learning Services and addresses the following questions:

- What is the market size and projected growth for the 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 the adoption of Learning Services?
- What are the benefits currently achieved by users of Learning Services?
- What factors are inhibiting user adoption of Learning Services?
- Who are the leading Learning Services vendors globally and by geography?
- What combination of services is typically provided within Learning Services contracts, and what new 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?

Learning Services Vendor Assessments Available for:

Capgemini

GP Strategies

IBM

Infopro Learning

Infosys

NIIT MTS

NLL Academy

Ozemio

Seertech Solutions

Tesseract Learning

VPS.

About The Author

Nikki is a Principal Research Analyst at NelsonHall, with shared responsibility for HRO research globally. Nikki is responsible for HRO research in the areas of Learning Services, Learning Platforms, and Managed Service Program (MSP)/Contingent Workforce Services (CWS). Nikki has a wealth of operational experience across the entire HR function, including talent acquisition, talent development, employee engagement, employee relations, compensation, benefits, payroll, employment law, and HR systems. She also has significant experience in leading and managing business transformation/integration and cultural change projects, including outsourcing key business functions, accelerated growth via TUPE transfers, organization and process redesign, and M&A initiatives (including due diligence, rebranding, cultural realignment, and compensation and benefits changes).



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About NelsonHall

NelsonHall is the leading global analyst firm dedicated to helping organizations understand the 'art of the possible' in digital operations transformation. With analysts in the U.S., U.K., and Continental Europe, NelsonHall provides buy-side organizations with detailed, critical information on markets and vendors (including NEAT assessments) that helps them make fast and highly informed sourcing decisions. And for vendors, NelsonHall provides deep knowledge of market dynamics and user requirements to help them hone their go-to-market strategies. NelsonHall's research is based on rigorous, primary research, and is widely respected for the quality, depth and insight of its analysis.

We would be pleased to discuss how we can bring benefit to your organization. You can contact us via the following relationship manager: Guy Saunders at guy.saunders@nelson-hall.com

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