Outsourcing of Learning and Training: An International Survey

A Joint Project by SRI Consulting Business Intelligence and ICWE GmbH

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INTRODUCTION AND ACKNOWLEDGMENTS

The past year or two have seen growing interest in and attention to learning and training (L&T) outsourcing issues, given the number of published articles and reports, as well as conferences and meetings on this topic. The reasons for this interest are many (and appear in more detail in the report *Learning Outsourcing: Strategic Opportunity* by SRI Consulting Business Intelligence's Learning-on-Demand [LoD] program), but it is clear that increasingly, organizations' L&T operations will need to run like any other part of the enterprise: as a business. This need means that L&T operations have to achieve specific business goals and hold to the same cost and business performance criteria as other parts of the business.

Good data on the emerging L&T outsourcing industry are still very scarce for this emerging industry—especially in the international arena, and until now we are aware of no surveys of L&T issues and development with broad international scope. For this reason, LoD teamed up with ICWE (the organization that manages the annual Online Educa conferences in Europe) to conduct an international survey of L&T outsourcing, taking advantage of the database that ICWE has created during a number of years of running the Online Educa conferences. The project was sponsored by IBM and Raytheon Professional Services, two of the largest providers of L&T services, with L&T outsourcing projects in North America, Europe, and Asia.

EXECUTIVE SUMMARY

This international survey of learning and training outsourcing practices is unique because of its participation of more than 800 respondents from 46 countries—with 75% from Europe (16% from Germany and 13% from the United Kingdom) and 14% from North America. Although most participants come from relatively small companies (with 32% of respondents from firms with 50 employees or fewer), 29% of the respondents come from firms with more than 1000 employees, including more than 50 organizations with more than 10 000 employees.

Some findings include the following:

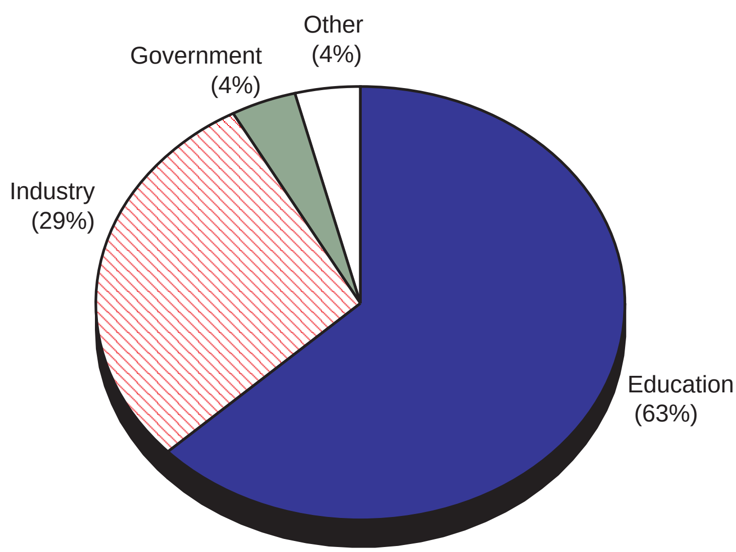
- *Operations need improvement*. Although respondents express a high degree of satisfaction with current L&T operations and believe that senior management and learners are also happy with current operations, they nevertheless see that significant changes are necessary to improve L&T operations (teachers, consultants/researchers, and technical directors are the people who agree mostly or strongly with the need for change).
- *A relatively small share of L&T budget goes to outsourcing*. The share of L&T budgets dedicated to outsourcing is still small—44% of respondents from organizations that are currently outsourcing L&T activities or functions report that less than 10% of L&T budgets go to outsourcing, but 19% of these respondents put the percentage between 10% and 25%.
- *The experience with and attitude toward outsourcing are positive*. Respondents from firms that have been active in L&T outsourcing feel very positive about their experience and also believe that senior management's attitude toward L&T outsourcing is either very positive or somewhat positive.
- *Outsourcing has been growing, but expectation for the future is mixed*. Although most respondents from organizations that are currently active in L&T outsourcing report that these activities have been growing—and they expect this growth to continue—those who are not currently active in L&T outsourcing believe that their organizations are not likely to embrace L&T outsourcing in a significant way in the next three years (but the percentage split between "not at all likely" and "somewhat likely" to embrace L&T outsourcing is very close, and the percentage of "somewhat likely" is much higher [44%] among North American respondents than among European respondents [28%]).
- *Fewer respondents expect learning technology to be outsourced in 2007*. The biggest surprise in the survey—and one that may be explained by how respondents interpret "L&T outsourcing" (much of it would likely fall in the category of outtasking rather than "selective outsourcing" or "comprehensive outsourcing"—see the box on page 15) is that a smaller percentage of respondents expect that "learning/training technology (hardware and software)" would be outsourced in 2007 than in 2004. This result was similar among North American and European respondents and was in industry as well as in the academic sector.

- *Four areas will see greater outsourcing*. The L&T activities and functions that a greater number of respondents expected to see outsourced in 2007 included content modification (that is, conversion of content to eLearning), content localization, management of professional learning communities, and management of other vendors that are providing training.

DEMOGRAPHICS

Attendees at ICWE's Online Educa's conferences on learning and training—in Berlin every year in December and in Madrid or Barcelona in late spring or summer—come from a range of sectors and industries, but the majority come from the educational sector. This majority source is evident in our survey responses: 63% of the total responses (816) came from this sector (see Figure 1).

Figure 1
RESPONSES BY SECTOR



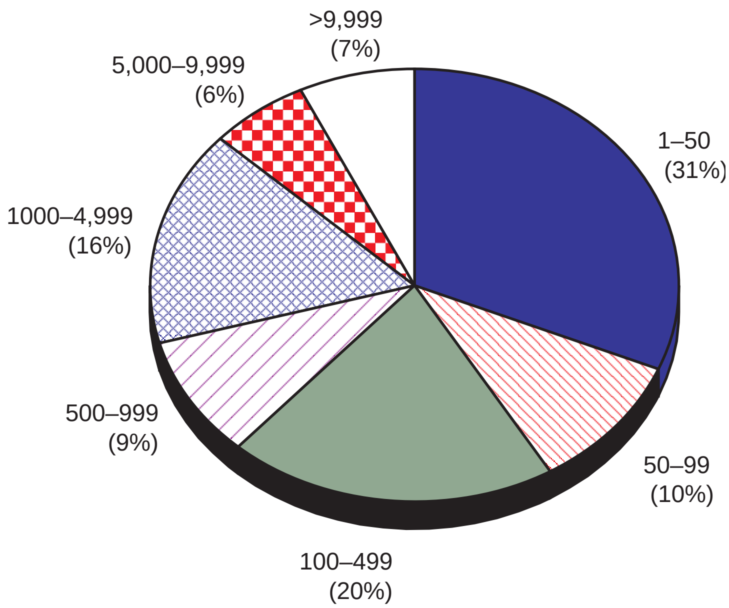
Source: ICWE; SRI Consulting Business Intelligence (SRIC-BI)

Industry participation came from a number of industries but the following five had the largest representation (percentage of respondents below):

- Business services, including research and consulting (17%)
- Transportation and communication (4%)
- Financial services, insurance, and real estate (2%)
- Health and other human services—other than education (2%)
- Manufacturing (including technology hardware and software).

Figure 2 shows the size distribution of the organizations that participated in the survey, and it is clear that small firms dominate, but more than 50 organizations with more than 10 000 employees were also represented (13% of industry responses came from companies with more than 10 000 employees).

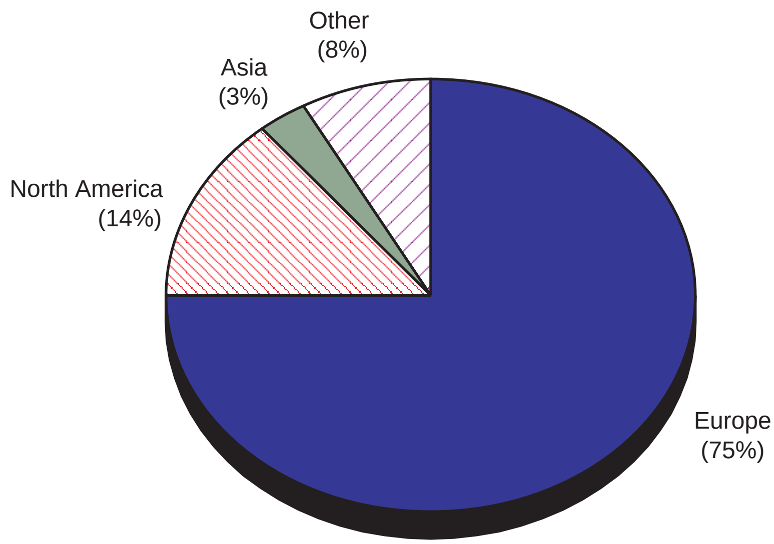
Figure 2
SIZE OF RESPONDENTS' ORGANIZATIONS



Source: ICWE; SRIC-BI

Not surprisingly, given the location of the Online Educa conferences, the bulk of the members of the ICWE database for the survey is dominated by European countries—especially the "Big Four" (Germany, United Kingdom, France, and Italy)—and this domination is evident in the survey respondents (see Figure 3). But the figure also shows a significant participation from North America and a small participation from Asia. The "Big Four" accounted for 36% of all respondents, with Germany and the United Kingdom with 16% and 13% respectively; Italy and France had significantly smaller participation (4% and 3%, respectively). A slightly larger percentage (29%) of European firms represented had more than 1000 employees, compared to North American firms represented (26%).

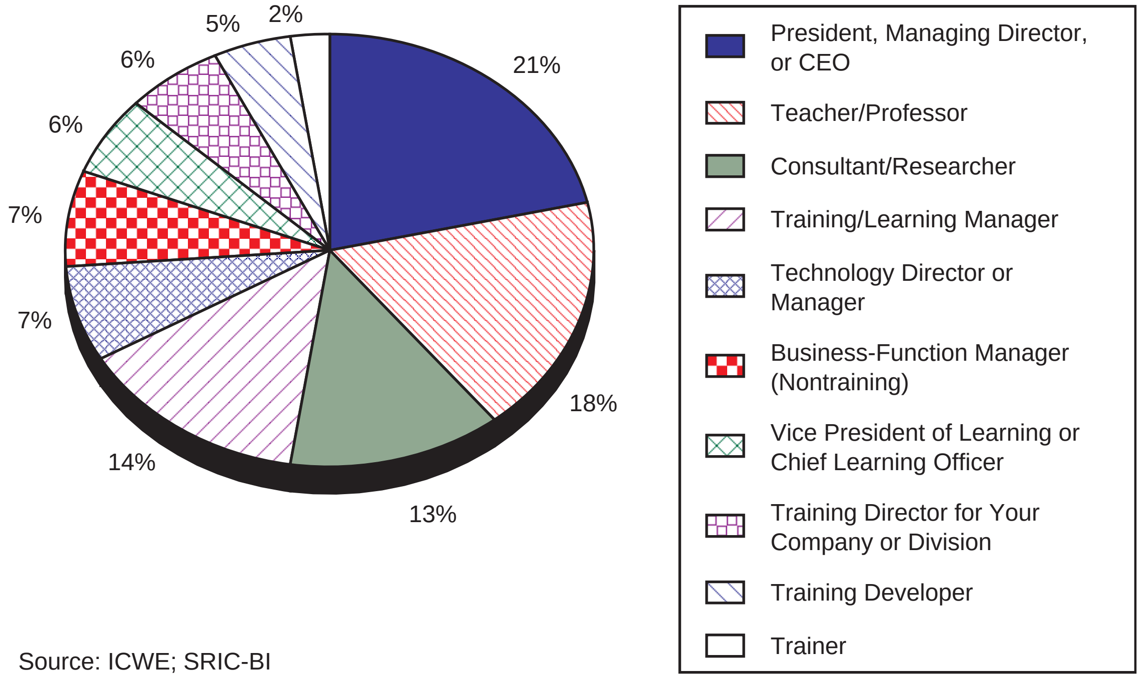
Figure 3
RESPONDENTS BY REGION



Source: ICWE; SRIC-BI

The survey represented a wide range of job positions, including a significant number of senior executives and other decision makers, in addition to managers in learning and training (see Figure 4). As everyone expected, professors, teachers, and consultants also had significant representation.

Figure 4
POSITION OF RESPONDENTS

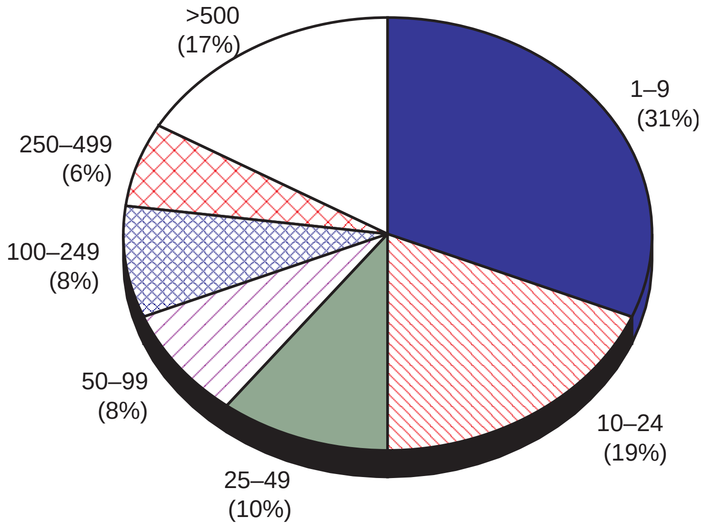


Source: ICWE; SRIC-BI

LEARNING AND TRAINING OPERATIONS: STATUS AND TRENDS

In view of the earlier demographic information, the fact that the L&T staff of the respondents' organizations are relatively small is not surprising—about one-third of the organizations have a staff of fewer than 10; 58% of the organizations have a L&T staff of fewer than 50 people. But 16% of the represented organizations have a large L&T staff of more than 500 people.

Figure 5
SIZE OF L&T STAFF



Source: ICWE; SRIC-BI

Survey results in Table 1 make it clear that a large majority of respondents believe that L&T operations are doing a good job and that internal customers are served well by their L&T staff. The high degree of satisfaction with current conditions—including the role of technology in L&T delivery and management's view of return on investment (ROI) on L&T—is highly positive and perhaps more positive than one could expect in view of the considerable and growing debate, at least in the United States, about how effectively L&T is meeting critical business and performance goals. Consequently, that the respondents' views are quite consistent across regions, with very little variation from North American and European participants, is interesting.

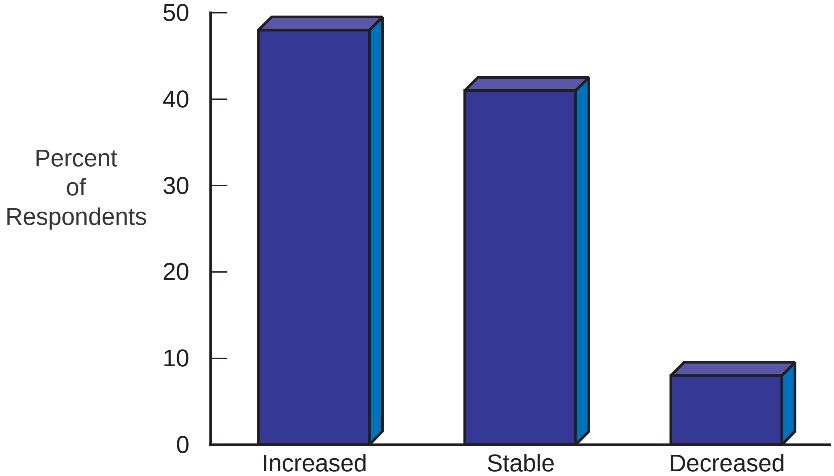
Table 1
CURRENT STATUS OF L&T OPERATIONS

Characterizations of Current L&T Operations	Percent of Respondents Who Agree Mostly or Strongly
Learners are happy with quality of L&T content	80
Information technology is well suited to L&T delivery	70
Senior management believes that the return on investment in L&T is satisfactory	69
L&T operations are effectively developing the skills necessary to drive organizational initiatives	67
Most operational units are confident that L&T operations will meet their future needs	65
Significant changes are necessary to improve our L&T operations	62

Source: ICWE; SRI Consulting Business Intelligence (SRIC-BI)

Despite considerable discussion in the L&T literature about tightening budgets and cutbacks in staff and funding for L&T, this situation is—again somewhat surprisingly, perhaps—not reflected in the survey results. As Figure 6 shows, most organizations have seen increasing L&T budgets (and increasing L&T staff) although no specific information was available about the rate of increase (according to the 2004 annual survey by *Training* magazine, 26% of U.S. organizations reported an increase in their annual budgets in 2004, compared with 22% reporting an increase in 2003). Analysis of the data by region also showed consistent result, but—again perhaps counterintuitively—a slightly higher percentage of North American respondents compared to their European counterparts indicated budget (and staff) increases for L&T during the past three years.

Figure 6
L&T BUDGET TRENDS IN PAST THREE YEARS*

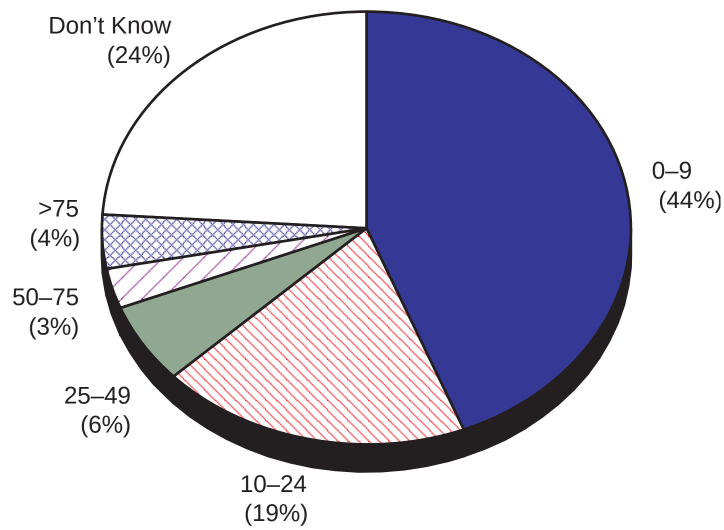


* Percent of respondents reporting increased, stable, or decreased budgets.

Source: ICWE; SRIC-BI

Despite growing adoption and investment in online L&T ("eLearning"), especially in North America and Europe, in both academia and industry, the percentage of total L&T budgets spent on eLearning in most of the surveyed organizations is relatively small—a result that may also be at least partly explained by the predominance of smaller firms in the survey. As Figure 7 shows, the largest group of respondents spent less than 10% of their budgets on eLearning; another 20% spent between 10% and 25%. Although many analysts believe that eLearning has become mainstream, certainly in large organizations, these results indicate that eLearning still is a relatively small part of overall L&T operations in many—and especially relatively smaller—organizations. In this area, however, North American and European respondents varied more than on many other questions, with North American respondents indicating that their organizations spent a higher percentage of their L&T budgets on eLearning than is the case among their European counterparts. Some 24% of the North American respondents reported spending between 10% and 25% of their L&T budgets on eLearning; 19% reported even higher eLearning budgets (compared to only 9% of Europeans reporting such higher budgets for eLearning).

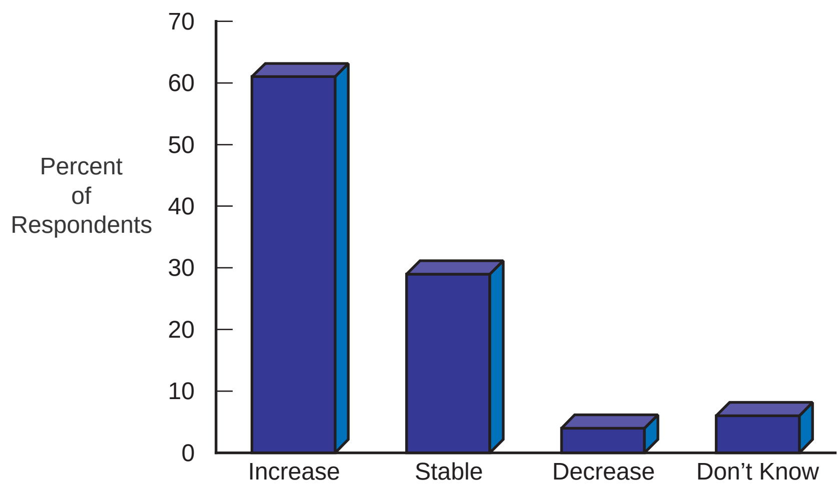
Figure 7
SHARE OF L&T BUDGET SPENT ON eLEARNING



Source: ICWE; SRIC-BI

Consistent with what the LoD program has found in our previous research, a strong majority of survey respondents expect their organizations to increase the share of eLearning expenditures (as a percent of total L&T budgets) in the next three years (see Figure 8).

Figure 8
LIKELY CHANGE IN PERCENT OF L&T BUDGET SPENT ON eLEARNING IN THE NEXT THREE YEARS



Source: ICWE; SRIC-BI

LEARNING AND TRAINING OUTSOURCING: STATUS AND PAST TRENDS

Pretesting of the survey questionnaire in a number of countries made it clear that we needed a simple definition of L&T outsourcing, because differentiating outtasking and selective and comprehensive outsourcing (see the box on page 15) would put too great a burden on respondents to read and understand definitions. For this reason, we adopted the following definition: Outsourcing L&T means contracting L&T activities/functions to an outside vendor. This broad, or liberal, definition explains why 59% of the respondents reported that they currently engaged in L&T outsourcing—much of which likely falls primarily in the "outtasking" category rather than the selective or comprehensive outsourcing categories of the box.

Table 2 shows which L&T activities the survey respondents' organizations are currently outsourcing. Technology not only tops the list, followed by learning-content–related functions, but also plays a role in two other activities that rank high: management of learning platform and systems integration.

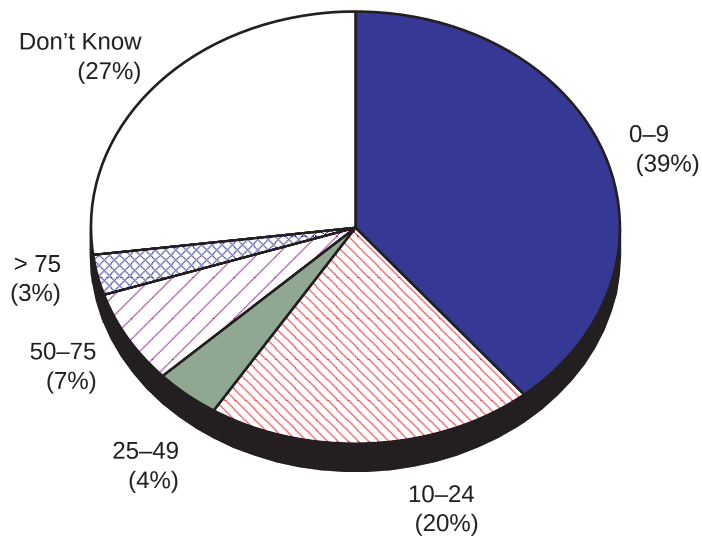
Table 2
L&T ACTIVITIES CURRENTLY OUTSOURCED

L&T Activity	Percent of Responses
Learning/training technology	46
Production of learning objects	29
Production of complete courses	25
Management of training delivery platform	23
Systems integration	22
Needs analysis	21
Content modification/conversion	21
Content localization	20
Consulting on strategic direction	20
Training-program design	20
Learner support/assistance	19
Training-program evaluation	18
Organizational development/change management	17
Training-program management	15
Course scheduling, registration, and so on	14
Management of training facilities	14
Project management	14
Management of professional learning communities	11
Management of other vendors providing training products and services	10

Source: ICWE; SRIC-BI

The results in Figure 9 support the presumption above that much of what the survey respondents see as outsourcing is likely outtasking as the box defines it—as the share of the L&T budget that respondents believe is spent on outsourcing is lower than it would be if a significant part of it were selective or comprehensive outsourcing. By far the largest number of respondents (39%) believe that their organizations spent only less than 10% of the L&T budget on outsourcing; 20% think that the share is somewhere between 10% and 25%. Perhaps not surprising, a large number of respondents admit that they don’t have any idea how much is spent on L&T outsourcing.

Figure 9
SHARE OF L&T BUDGET THAT IS OUTSOURCED



Source: ICWE; SRIC-BI

Although the L&T outsourcing industry is in its infancy and budgets for L&T outsourcing are still small, the survey shows growing interest in outsourcing: A large percentage of the respondents have seen the budgets for L&T outsourcing increasing in the past three years (see Figure 10). A larger percentage of European respondents (43%) have seen L&T outsourcing increase in the past three years than North American respondents (35%) have seen (a result that is different from what we would have expected). Interestingly, these results are not significantly different in industry from in the academic sector.

THE OUTTASKING-OUTSOURCING CONTINUUM

Although no consensus exists in the learning and training outsourcing industry about where to draw the lines between the three categories below—or what functions and training activities go into each of these main categories—most analysts and practitioners (vendors) are comfortable with these definitions and differentiations.

Outtasking
Specialist firms help with specific tasks or parts of the processes below. Tasks tend to be project driven and based on transactional pricing.

Selective Outsourcing
External service firms take complete responsibility for and control of selected processes or activities. Choice is process driven and helps mitigate risk.

Comprehensive Outsourcing
An outsourcing firm takes over an organization's total training operations or major portions, such as learning infrastructure, administration, or design, development, and delivery.

Low — Medium — High → Scope of Outtasking or Outsourcing Project

Learning Processes and Activities

Technology and Infrastructure

- Learning-Management System
- Learning-Content–Management System
- Virtual Learning Environment
- Business-Collaboration Environment
- Content-Distribution Network
- Standards-Compliance Testing Lab
- System Integration to Human-Resources Information System and Billing Systems
- 24-7 Multichannel/ Multilingual Service Center

Administration and Operations

- Learner Registration and Cancellation
- Learner Advisory Services
- Learner Case Management
- Class Scheduling
- Instructor, Facilities, and Resource Scheduling
- Class-Fill-Rate Analysis, Consolidation, Cancellation, and Wait-List Management
- Class Evaluation Collection and Archival
- Class-Certification Preparation
- Print and Fulfillment of Course Materials
- Facilities Management
- Vendor Management, Sourcing, Contracting, Payment, and Quality Control

Content Design, Development, and Delivery

- Program Design and Development
- Program Delivery via Classroom, the Web, or a Blended Approach
- Conversion of Classroom Content to eLearning
- Content Localization
- Content-Vendor Management

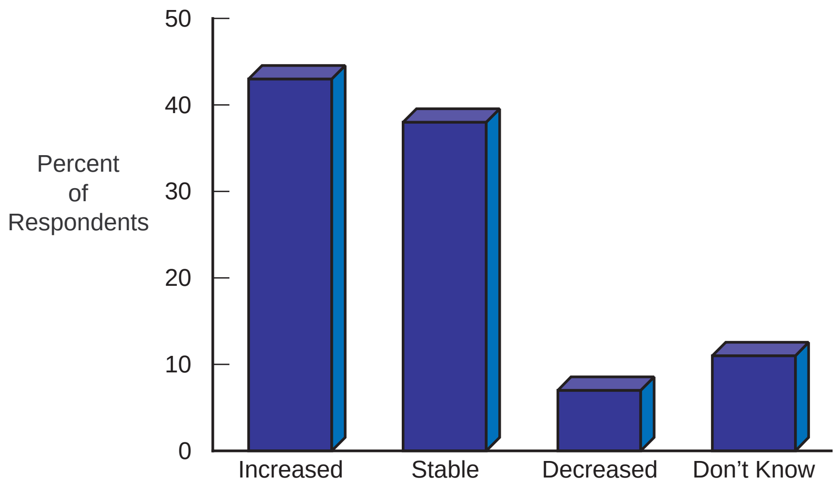
Strategic Operations

- Strategic Direction and Governance
- Needs Analysis
- Project Management
- Measurement
- Delivery of Strategic Programs/ Interventions (Such As Executive Development)
- Performance Consulting
- Organizational Development and Change Management

Source: Convergys (*Get Ready For Learning Outsourcing)*; SRI Consulting Business Intelligence (SRIC-BI)

The survey results also show that senior management attitude toward L&T outsourcing (see Figure 11) is either somewhat positive (42%) or very positive (23%). North American respondents report a somewhat higher "very positive" attitude toward L&T outsourcing by senior management, whereas a larger percentage of European respondents report a "somewhat positive" attitude. However, a significantly higher "very positive" attitude toward L&T outsourcing among senior management is in industry compared to in the academic sector (31% reports a "very positive" attitude in industry, whereas the percentage in the academic sector is only 20%).

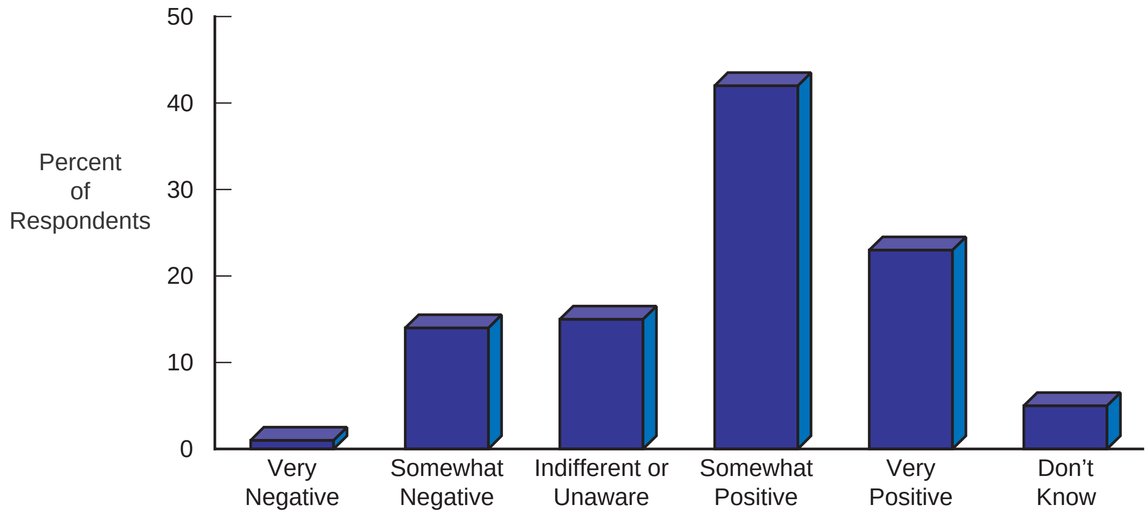
Figure 10
CHANGE IN THE PAST THREE YEARS IN THE PERCENTAGE OF L&T BUDGET THAT IS OUTSOURCED



Source: ICWE; SRIC-BI

Table 3 shows the main reasons why the organizations of the survey respondents have been embracing L&T outsourcing. Access to expertise not in-house is the most important driver for L&T outsourcing, followed by the ability to focus L&T staff on more strategic issues when they outsource certain L&T functions. It is also interesting to see that reducing operating costs of L&T operations through outsourcing (often the main reason for engaging in outsourcing) is rated considerably lower than a number of other factors shown in the table.

Figure 11
SENIOR MANAGEMENT ATTITUDE TOWARD L&T OUTSOURCING



Source: ICWE; SRIC-BI

Table 3
REASONS FOR DECIDING TO OUTSOURCE L&T*

L&T Outsourcing Decision Factors	Somewhat Important + Quite Important + Extremely Important* (Percent)
Wanted to gain access to expertise not available in-house	20+33+37 = 90
Desire to enable internal staff to focus better on strategically important issues/activities	22+36+22 = 80
Wanted to improve the quality and/or consistency of training content	16+30+32 = 78
Did not want to deal with activities that are not within our organization's core competencies or mission	24+28+21 = 73
Wanted to avoid outdated technology	19+29+18 = 66
Wanted to reduce operating costs for training	23+29+13 = 65
Wanted better accountability or better ability to measure/track costs	28+21+11 = 60
Wanted to avoid making new investments associated with doing our own L&T	25+21+9 = 55

* Percent of respondents selecting choices in table

Source: ICWE; SRIC-BI

When selecting L&T outsource vendors, the survey respondents point to reputation in the L&T industry as the most important decision factor. Despite the earlier result that cost was not the primary reason for embracing L&T outsourcing, the results in Table 4 make clear that costs and price are still important considerations when organizations are choosing among different vendors. But, not surprisingly, experience in L&T outsourcing and a number of other factors also come into play when selecting vendors.

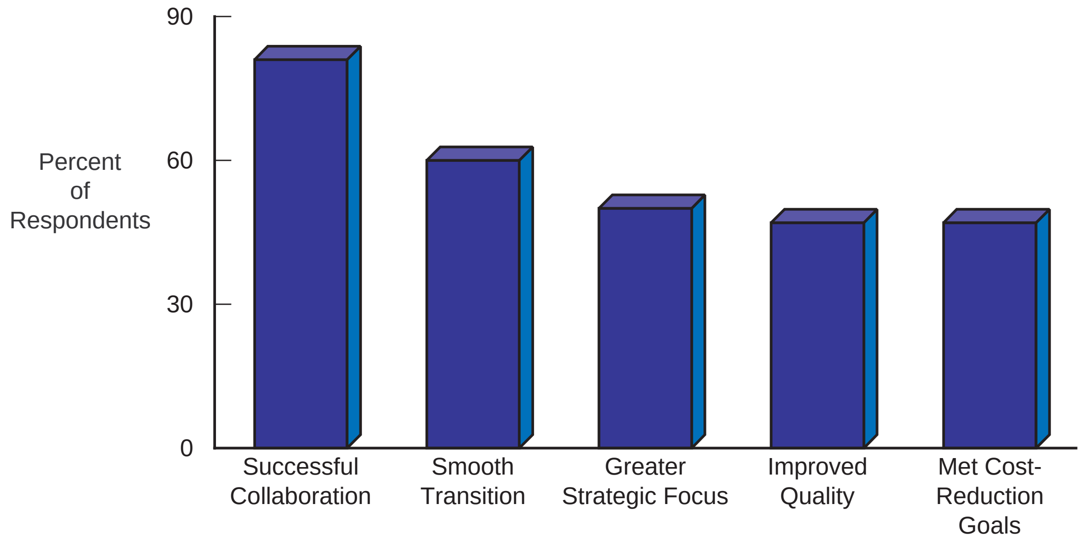
Table 4
KEY DECISION FACTORS IN SELECTING OUTSOURCING PROVIDER

Decision Factors	Quite Important + Extremely Important (Percent)
Provider's reputation in the L&T industry	83
Cost/price	76
Provider's wide-ranging experience in L&T outsourcing	72
Amount of time necessary to complete the project	70
Provider's extensive experience in our industry and/or country	69
Provider's ability to develop learning content	62
Provider's ability to serve multiregional or multinational operations	47

Source: ICWE; SRIC-BI

Organizations that have embraced L&T outsourcing report positive experiences, including successful collaboration with their outsourcing vendors. Such experiences are key to success because outsourcing must be a partnership in which the client works closely with the vendor to ensure a successful outcome—although more important on the right side of the continuum in the figure in the box than on the left side of the continuum. As Figure 12 shows, survey respondents also note a smooth transition to a new situation in which the outsourcing partner takes over certain L&T activities and functions and allows the internal staff to focus more on key strategic issues. Improved quality also results; cost-reduction goals ranked fifth.

Figure 12
L&T OUTSOURCING EXPERIENCE



Source: ICWE; SRIC-BI

For organizations that have not yet embraced L&T outsourcing, some of the reasons holding them back are in Table 5. As the table shows, seeing outsourcing as inconsistent with the organization's management philosophy or corporate culture was a more important barrier than was the cost or price of buying L&T outsourcing services (positions with a high percent of "extremely important" for this factor included teachers/ professors, consultants/researchers, business managers, and training directors in organizations not currently outsourcing). We see that the survey respondents also think that they have the knowledge necessary to understand and make decisions about L&T outsourcing, but as we note earlier, this knowledge and understanding likely pertains more to a situation with a great deal of outtasking than one with selective and comprehensive L&T outsourcing as the box defines.

Table 5
REASONS FOR NOT OUTSOURCING L&T

Reasons for not outsourcing L&T	Quite important + Extremely Important*	Not Important*
Outsourcing is not consistent with our management philosophy or corporate culture	57	
We do not believe outsourcing is likely to help our organization	47	
L&T topics are too sensitive/proprietary to involve anyone outside the organization	47	
Outsourcing is too expensive	41	
We don't know enough about outsourcing		69
It is too complicated to make decisions about outsourcing		58
We cannot find quality suppliers for what we want to do		46
It is too difficult to change current L&T operations		42
We have other more urgent priorities		38
Outsourcing probably would face significant opposition from other in the organization		37

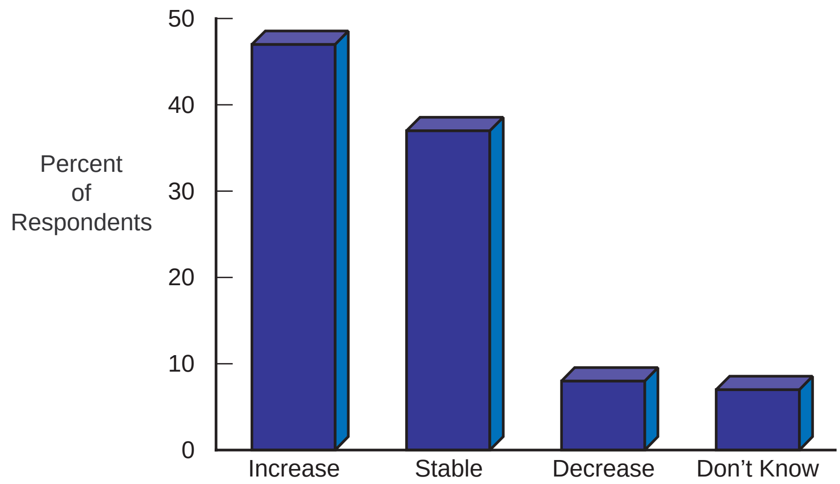
* Percent of respondents who are not currently outsourcing

Source: ICWE; SRIC-BI

FUTURE OUTSOURCING OF LEARNING AND TRAINING

Despite the high level of satisfaction with the current state of affairs in L&T that the survey results show—whether justified or not—the results also reveal a large percentage of respondents expecting L&T outsourcing to increase (as a percentage of the total L&T budget) in the next three years (see Figure 13). Positions that voted strongly in favor of such an expected increase included president/managing director/CEO, training managers, business managers, and training directors. This predilection means that survey respondents expect a continuation of the trajectory from the past three years. The results in Figure 13 were very consistent across the different sectors—almost identical for industry and the academic sectors (but a somewhat higher percentage of respondents in the government sector expecting increased outsourcing)—as well as across regions, although (and perhaps somewhat surprising) a somewhat higher percentage of European respondents expected the L&T budget share of outsourcing to increase in the next three years.

Figure 13
EXPECTED CHANGE IN THE NEXT THREE YEARS IN THE PERCENTAGE OF L&T BUDGET THAT IS OUTSOURCED

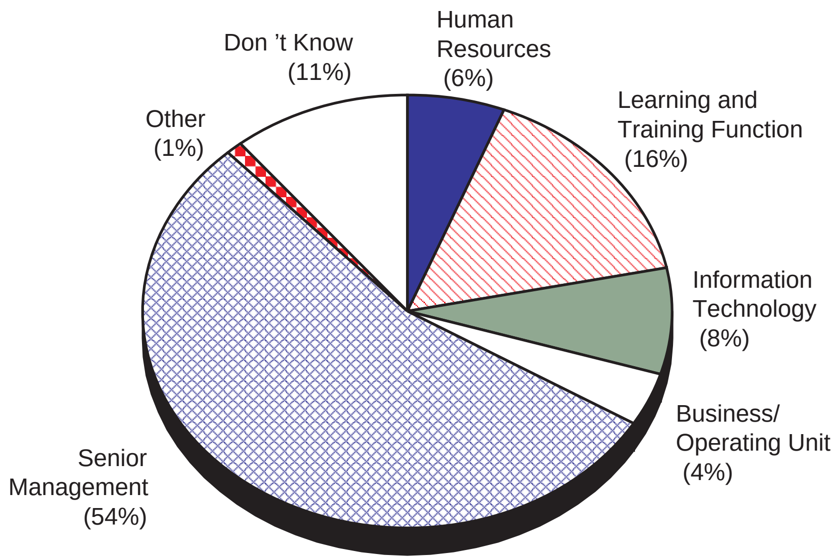


Source: ICWE; SRIC-BI

Continued growth in L&T outsourcing is also consistent with the following survey results:

- An increasingly favorable attitude of senior management toward L&T outsourcing (and, as Figure 14 shows, the survey results reveal that senior management make most of the L&T outsourcing decisions)
- A positive experience so far with their L&T outsourcing by most of the respondents (and most feel sufficiently knowledgeable and confident about dealing with L&T outsourcing)

Figure 14
GROUPS WITH PRIMARY RESPONSIBILITY FOR MAKING L&T OUTSOURCING DECISIONS



Source: ICWE; SRIC-BI

Survey respondents also revealed that they have a positive perspective on the "supply side" of the L&T outsourcing equation. Some of the respondents' views on the vendor landscape included the following:

- They have been satisfied with their ability to find providers to meet their needs.
- Vendors have the required experience, not just in L&T outsourcing in general but also in their industry or country (but they also note that vendors have very different levels of experience).
- Vendors have the scale of operation and the capacity to meet customers' needs.

The most surprising and unexpected result of the survey related to which L&T activities and functions the respondents expected to see change in the next three years. Most surprisingly, a smaller percentage of respondents expected L&T technology (hardware and software) to be outsourced in 2007 than in 2004 (34% for 2007 versus 46% for 2004). A number of other L&T activities and functions saw smaller percentages of respondents expecting these functions to be outsourced for 2007; the four in Table 6 saw higher percentages of respondents expecting these functions to be outsourced in 2007.

Survey results also show that despite the considerable comfort with L&T outsourcing and the experience so far among respondents who have so far outsourced L&T activities and functions, those who have not yet embraced L&T outsourcing are still hesitant and reluctant to join the fray. (We earlier discussed the results showing that many of those who are not currently outsourcing L&T believe that outsourcing "is not consistent with our management philosophy or corporate culture," which explains some of the results below.) For those who have not yet outsourced, the ambivalence is evident from the results in Table 7 (the reluctance is somewhat higher in the academic sector).

Table 6
OUTSOURCING OF L&T ACTIVITIES AND FUNCTIONS: 2004 VERSUS 2007*

L&T Activity or Function Being Outsourced	2007/2004
Content modification (that is, content conversion to eLearning)	25%/21%
Content localization	24%/20%
Management of professional learning communities	15%/11%
Management of other vendors providing training	11%/10%

Source: ICWE; SRIC-BI

Table 7
AMBIVALENCE IN EMBRACING L&T OUTSOURCING AMONG THOSE NOT CURRENTLY OUTSOURCING

Likelihood of Outsourcing L&T in Next Three Years	North America	Europe
Not at all likely	50%	45%
Somewhat likely	44%	28%

Source: ICWE; SRIC-BI

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