

e-learning Outsourcing 2009: Advantage India

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Abstracts

In recent times, corporations, educational institutions and governments have started re-examining the way training and education are imparted. e-learning has now become a crucial part of their strategy to deliver knowledge. But maintaining e-learning systems within the organization equals more costs. The solution? Outsource, and don't look back – more international organizations, realizing cost advantages, are moving from dealing with local e-learning service providers to directly approaching Indian companies.

Revenues from the Indian e-learning offshoring industry stand at approximately USD 341 million at the end of calendar year 2008. While the economic recession will impact the growth in the industry for the next 6-8 quarters, the market will recoup and grow much faster, until 2012. Taking these factors into account, our estimates suggest that the e-learning offshoring industry will grow at a CAGR of 15% till 2012, though growth will be more subdued till 2010. ValueNotes estimates the market size to touch \$603 million by the end of calendar year 2012.

e-learning has several processes that can be outsourced, which we have grouped into the following buckets - content (development and repurposing), technology (tools to create, deliver and support content), and services (consulting and support services). Their current levels of offshoring and the opportunities for the future have been discussed in the report.

Today, the Indian e-learning outsourcing industry consists of both, third-party providers and offshore delivery centers of international e-learning providers and consulting firms. Apart from pure-play e-learning firms, companies from fields such as IT, BPO, publishing and domestic retail education have made a foray into the market, mostly in the last decade. Given the fragmented nature of the Indian industry, ValueNotes estimates that there are not more than 35 e-learning providers who have more than 100 employees. There are well over a hundred other smaller providers in this space.

We have grouped the service providers in the Indian e-learning industry based on their service capabilities and maturity. Our analysis has thrown up 4 distinct clusters, including the market leaders - the pioneers. It is their movements that will determine the strategic direction for the rest of the players in the industry in the next 4 years.

The ValueNotes report, titled 'e-learning Outsourcing 2009: Advantage India', presents the competitive landscape of providers in the e-learning space in the country. It features in-depth insights and analysis, including the competitive standing of India as an outsourcing destination, the services being outsourced, the client markets, and providers and their strategies for the future. Key market trends are also discussed, in light of certain opportunities and challenges - including the implications of the global economic slowdown on the industry.

This report will help:

Corporates and academic institutions who are looking to outsource / offshore their e-learning requirements

e-learning providers to assess their competitive environment

International providers looking for Indian partners

Outsourcing consultants to evaluate and compare the offerings of Indian providers

Researchers and academicians looking for detailed information on e-learning outsourcing

The report is based on secondary information as well as extensive interviews with a number of e-learning service providers in India.

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