

E-Learning Market Update - Scandinavia (Mar 11)

With around 20 million people in Sweden, Norway and Denmark, and some of the highest internet usage and IT maturity in the world, these are our kind of people. So what's their take on learning technology? Bengt Gustafsson, director of Kineo Sweden, takes us on a tour.

The overall market

The Scandinavian market has many large corporate players. Dominant industries include Telecommunications, Engineering, Oil & gas, Shipping, Construction and Forest products. Some of the better known corporates include Ericsson, Statoil, Maersk, Volvo Group (Trucks, Bus, Construction Equipment etc.), Vattenfall, Skanska, SCA, Electrolux and Telenor.

As we get towards the spring the climate in the Scandinavian are getting warmer – and not just temperature wise. The Scandinavian countries have not been hit that hard by the economic downturn as most of the countries in Europe and are in better shape than many economies. Quick quiz: How many Scandinavian countries are in the top 10 world ranking of GDP per capita? Answer: all of them (UK is 21st, for shame).

Experience in using e-learning is mature and today the understanding of the possibilities of using e-learning is far more realistic than a few years ago. E-learning today is considered an established approach to training and there are not unrealistic expectations of e-learning as a silver bullet approach, but one to be combined effectively with others.

Bespoke and rapid e-learning content

Larger bespoke e-learning needs for corporates are typically run from central training or marketing functions, similar to other European markets. However, there is a clear trend to distribute e-learning production initiatives to a department level. IT-maturity and general Scandinavian corporate culture, together with the development of simple authoring tools has made it relatively easy for in-house production of training material. However, competence in applying principles for effective training design has not followed in general competence in production – so there's a need for more support of internal teams.

The Scandinavian e-learning market consists of a number of small local players. Having small domestic markets but some very large international corporations has brought many of the e-learning companies in to support them. A result is that a lot of localized material for a number of different markets is produced.

Smaller e-learning companies in Scandinavia have the same challenges as their counterparts elsewhere in Europe - developing their competencies and balancing production when workload swings up and down. They're also challenged when it comes to supporting their clients internationally.

The LMS market

In the Scandinavian LMS market there are only a couple of the large international players represented and their clients are mainly a few multinational corporations. Otherwise most LMS are locally developed and supported by small suppliers. Like the rest of the world, The LMS market is likely to see consolidation in the coming years as LMS is getting more mature. There is an increasing number of initiatives for integrating LMS functions with collaborative tools to create more of a learning community. There are no major players providing open source LMS services in the market, so the opportunity for Moodle and Totara is considerable.

Mobile Learning

With a high penetration of mobile phones and a very mature telecoms sector, you might think that mobile learning really would have taken off in Scandinavia. But it hasn't happened - yet. One of the reasons has been lack of common standards. But that's changing here as it is everywhere else and as we start to see more standard platforms we are likely to see an increase in mobile learning. The Scandinavians will probably be early adopters once standards stabilize.

What's next?

This market is very open to new ideas and approaches. We expect to see a lot of interest in open source tools, especially for LMS, and we're looking forward to spreading the word from Kineo. There will continue to be a core requirement to deliver effective e-learning, increasingly in blended contexts, and making the most of authoring tools. Keep an eye on mobile in this market too – the appetite and usage patterns are in place; just need the platforms to catch up.

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