



IV ASFOR Learning Survey: An Italian Perspective

By: Elio Borgonovi ASFOR member of the board in charge of the Research

Research team: Manuela Brusoni, Salvatore Garbellano, Mauro Meda, Vladimir Nanut, and Elio Vera

ASFOR, the Italian Association for Management Education Development, has recently presented the main results of the fourth Learning Survey focused on Italian organizations. ASFOR received 55 questionnaires from large and medium companies (e.g. Barilla, ENEL; ENI, Ferrero, Mediolanum, Pirelli, Poste Italiane, Seat, etc.), public organizations and subsidiaries of multinational companies located in Italy (e.g., Auchan, Manpower, STMicroelectronics, Vodafone, etc.). The survey has focused on the effects of the economic recession on Italian training system.

Main results

1. Education as business partner

Italian organizations confirm they have achieved high levels of integration of the management education with the line managers, but less with the CEOs. Three years forecasts show the need to improve the integration at the highest hierarchical ladders of the organizations as well as the integration between education and the entire human resources management systems (even the "informal learning" such as the on the job training).

2. The budget reductions

For the current year, many organizations (34.6%) have sharply reduced the training budget. The majority of the organizations (48.1%) have maintained stable the budgets. Only in few organizations (in particular some medium innovative companies), the budget is increased.

All the organizations are more interested in using the public funds that are available to finance the training programs.

Today Italian organizations are concerned on the efficiency. They are reducing all the training costs (facilities, travel expenses, professional fees for training providers, etc.).

The focus of training activities is changing. The majority of the organizations (51.1%) are implementing training programmes that are able to obtain business results quickly. For this reason, the companies are developing learning programs necessary to implement strategies and to improve the organizational performances.

Many organizations are focusing their activities on the participants that have been evaluated as "key people": high potentials, change agents, program managers. The majority of the organizations (66.6%) are developing customizing programs with business schools and training companies.

3. Education providers

Italian organizations show an increase on the relevance of the role of the managers as trainers. All other providers (business schools, training and consulting companies, individual experts and consultants, etc.) come after in their choices, although they play a strategic role.

4. What the companies request from the education providers

Almost all the respondents request the education providers to offer more tailored programs in terms of contents and methodologies as well as an increased knowledge of the business of their costumers. Other requirements are:

- To be more innovative (contents, methodologies, etc.)
- To obtain results aligned with the strategies of the organization that could be measured even through reliable indicators
- To find more efficient solutions without decreasing the quality level.



The ASFOR research: "4° Survey Learning Observatory"

By

Elio Borgonovi ASFOR member of the board in charge of the Research

Research team:

*Manuela Brusoni, Salvatore Garbellano, Mauro Meda, Vladimir Nanut,
and Elio Vera*



The research

The "**Learning Observatory**" aim is to let arise scenarios, trends, ideas from the Italian Training World.

The 4° edition of the Observatory focuses on the impact that the economical crisis has on training

56 private and public institutions have taken part to the research.

The average number of employees of the institutions involved is 9.496: the 53,8% of the sample declares to have got a high level of internationalization and a high diversification of the business

ASFOR Research "4° Survey Learning Observatory" - 2009



The sample

56 companies:

PUBLIC UTILITIES: •ENEL UNIVERSITY •POSTE ITALIANE	INDUSTRY: •ALCAN PACKAGING •ALENIA AERONAUTICA •ANSALDO ENERGIA •AZIMUT YACHTS •BARILLA G&R F.LLI •BREMBO •BTICINO •CHLORIDE GROUP •COMAU •DALLARA AUTOMOBILI •ENI •FERRERO •MALAGUTI •MARTINI & ROSSI •MECAER MECCANICA AERONAUTICA •PARLAMALAT •PAVIMENTAL •PIRELLI & C. E CONTROLLATE •SEWS CABIND •STMICROELECTRONICS •TECHNOGYM	IT SERVICES: •CSI-PIEMONTE •ITALTEL •EDS, AN HP COMPANY •ORACLE ITALIA	BANCKING SERVICES: •BANCA POPOLARE DI MILANO •BANCA POPOLARE DI VICENZA •DELTAS Gruppo Credito Valtellinese •BNL •CREDITO EMILIANO •INTESA SAN PAOLO •GRUPPO MPS •MEDIOLANUM CORPORATE UNIVERSITY	SERVICES: •ADECCO ITALIA •ARVAL SERVICE LEASE ITALIA •CEGOS ITALIA •ENIA •ERNST & YOUNG BUSINESS SCHOOL •HUMANAGE •KELLY SERVICES •LA GRUA •MANPOWER •MARSH •RIMINI FIERA •SEAT PAGINE GIALLE •VODAFONE	COMMERCE: •AUCHAN •BERNER •GROUPEM •UNIEURO
PUBLIC ADMINISTRATION: •AZIENDA OSPEDALIERA UNVIERSITARIA SAN MARTINO •INPDAP •SCUOLA SUPERIORE AMMINISTRAZIONE INTERNO •ISTITUTO SUP. DI STATO MAGGIORE INTERFORZE					

ASFOR Research "4° Survey Learning Observatory" - 2009



Need to improve the integration of the management education with the top management and the personnel management system

■ The data confirm the trend already shown last year: in many Italian and foreign realities, still there is a great distance between training and top management.

On the other end, the integration between the business responsible is good.

■ In the same time, there is the awareness to the need to improve the integration with the top of the organizations and the personnel management and development systems, and with the on workplace training.

Today management training is an acknowledged operative partner, but not always an acknowledged strategic partner

ASFOR Research "4° Survey Learning Observatory" - 2009



2009 training budget

Strong trend towards reduction compared to 2008, but with important exceptions

- **48,1%** declares that the 2009 **budget will remain unchanged vs 2008**
- **34,6%** declares that the 2009 will be lower than 2008
- Il **17,3%** declares that **2009 budget will increase vs 2008**
- The companies that lowered their budget show a huge cut
- Food companies, a few banks and service sector seem to resist

2010 forecast

- Forecast for 2010 budget: generally unchanged with some positive signal.
- Generalise decrease seem to an end

The interest toward source of financing of training is increasing (interprofessional, european, national funds, ecc.)

ASFOR Research "4° Survey Learning Observatory" - 2009



Crisis and training: the answer of the companies

- Many training managers have changed their training strategies
- **48,1%** of companies have changed their training priorities
- **59,6%** of companies have increased their attention toward the **efficient use** of the resources devoted to training.
- **51,9%** oriented training to obtain a increase of company's results in a more quick and direct way (also through a better persinalisation of the programmes)

ASFOR Research "4° Survey Learning Observatory" - 2009



The research of efficiency

- The research of efficiency was done through two main ways:
 1. Reduction of participants and teachers travel expenses (63,5%)
 2. The increased importance of the "quality at the minimum cost" in choosing training suppliers (55,8%)
- 25,0% of the companies has reorganized the organizational unit devoted to training and the 9,8% of the companies has reduced the personnel in charge of training

ASFOR Research "4° Survey Learning Observatory" - 2009



Training offer change

The companies not only reduced their training programmes, but have also modified the offer of training:

- 73,1% of the companies has introduced new programmes in line with new priorities like cost , efficiency, sales.
- 62,5% focuses on strategic objectives
- 54,9% puts an increase attention to evaluation methodologies of training
- Il 50% focuses on individual participants activities as strategic.

ASFOR Research "4° Survey Learning Observatory" - 2009



Companies ask to their training suppliers

- Increased personalization of the training offer in terms of projects and contents.
- Attention to costs: research of more efficient solutions and ability to found new sources of financing
- Importance of innovation: in contents. Methodologies, benchmarking
- Increase dialogue and interaction with the internal corporate structures
- Openness to internalisation

The training challenges

- To be of concrete support to the company strategy contributing to company results, giving support to change management
- Develop integration with management systems and personnel development (talent and performance management, leadership development)
- Attention to costs and use of an efficient and effective use of resources
- Contribute to keep high the motivation (reinforcing company identity and belonging feeling) in a situation of crisis

ASFOR Research "4° Survey Learning Observatory" - 2009