



The ASFOR research: “4° Survey Learning Observatory”

By

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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



The sample

56 companies:

PUBLIC UTILITIES:

- ENEL UNIVERSITY
- POSTE ITALIANE

PUBLIC ADMINISTRATION:

- AZIENDA OSPEDALIERA UNVIERSITARIA SAN MARTINO
- INPDAP
- SCUOLA SUPERIORE AMMINISTRAZIONE INTERNO
- ISTITUTO SUP. DI STATO MAGGIORE INTERFORZE

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
- GROUPM
- UNIEURO



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



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.
- Generalized decrease seem to an end

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



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 personalisation of the programmes)



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



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.



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