ASFOR (Italian Association for Management Education Development) has recently presented the results of the eighth Learning Survey focused on Italian organizations. From April to July 2012, ASFOR received 72 online questionnaires from leading Italian companies in manufacturing (A2A, Chloride, Enel, Eni, Finmeccanica, Ferrovie dello Stato, Indesit, Italcementi, Itafor, Pirelli, Selex Sistemi Integrati, Skf Industrie etc.), and finance and insurance (Banca Antonveneta, Deltas, Gruppo Assicurazioni Generali, Intesa Sanpaolo Vita, Mediolanum Corporate University, Reale Mutua Academy, Santander Consumer Bank, UBI Banca, etc.). Some of these are subsidiaries of large multinational companies located in Italy (Banca Antonveneta, Deltas, Gruppo Assicurazioni Generali, Intesa Sanpaolo Vita, Mediolanum Corporate University, Reale Mutua Academy, Santander Consumer Bank, UBI Banca, etc.) whereas others are well-known medium-size companies (Ariston Thermo, Aziende Chimiche Riunite Angelini Francesco Bticino, Locioni, Lombardini, Technogym, etc.).

Main Results
1. New Signs of Budget Cuts
We are living in a turbulent and volatile environment. In 2009, many organizations sharply reduced their training budgets. This trend was reversed in 2010, and 2011 saw some indications of recovery. Yet in 2012 many organizations again cut their investment in education. A significant percentage of organizations (40.9%) maintained their budgets at the same level as in the previous year. Notably, there are more companies (34.8%) that have decreased their training budgets than companies that have increased them (12.2%). All the organizations in Italy are concerned about efficiency. They are more attentive to all training costs (facilities, travel expenses, professional fees). Almost all organizations are more interested in using public funds from the European Union and the Italian state that are available for training programs. The largest part of the typical training budget is earmarked for technical training (55.3%), while smaller portions are allocated to executive education (33.5%) and consultancy and research (12%).

2. Focus of the Learning Activities
In 2012, two trends gained momentum: the majority of Italian organizations preferred customized training programs focused on techniques that can quickly improve business results. The main topics of the learning programs were technical and professional competencies, leadership, and change management.

The most innovative Italian organizations are testing the capability of social networks (for example, Youtube, Facebook, etc.) to perform as learning platforms.

3. Education Providers
Most organizations – not only large companies but also medium-size enterprises - are developing customized programs and sometimes strategic alliances with business schools or executive training companies to foster innovation and sensitivity to multicultural markets and clients. Meanwhile, managers are increasingly likely to assume the role of trainers, mainly in technical fields.

4. What Companies Expect From Education Providers
The respondents continue to report a good level of satisfaction with education providers who deal with the challenges of the new social environment and the increasing competition.

Generally, respondents expect education providers to offer more tailored programs in terms of contents and methodologies as well as an increased knowledge of the business of their customers. Other common requirements are for education providers to be more innovative and adaptive to customer needs, to deliver results aligned with the strategies of the organization that can be measured through reliable indicators, and to find more efficient solutions without decreasing the quality level.

The report on the ASFOR Learning Survey is available on our website: www.asfor.it.