

TRANSFORMATIONS, SKILLS & LEARNING



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BEYOND KNOWLEDGE*



As a European and international leader in Learning and Development, the Cegos Group is both a keen observer and a dedicated player in the world of work and business.

Our mission goes beyond the simple economic framework.

We train and support individuals and organisations to meet their development challenges.

By helping our clients to bring out the best in themselves, we contribute to making the professional world a better place.

Faced with the radical transformations that are disrupting our societies, the pledge we make to our customers is more relevant than ever. **We are committed to transforming skills into performance.**



Turnkey professional training courses (on-site learning, distance or blended learning)



Tailor-made learning solutions and change support



Training outsourcing



Digital and blended learning



Business & skills strategy and learning organisation

+250,000

people trained each year

€200M

revenue

50

countries covered worldwide

1,100

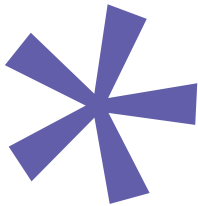
employees

+500,000

users on the LearningHub@Cegos

+ 3,000

pieces of multilingual digital content available



The Cegos Group has recently released the results of its international barometer entitled “*Transformations, Skills and Learning*”. The 2022 survey polled 4,005 employees and 377 HR Directors and Managers or Training Directors and Managers, all working in private- and public-sector organisations employing fifty employees or more, in seven countries in Europe (France, Germany, Italy, Spain, Portugal), Asia (Singapore) and Latin America (Brazil).

- ★ According to HRDs-HRMs, **20% of the jobs in their organisation are at risk of becoming obsolete** in the next three years.
- ★ **78% of employees say they would be willing to consider a complete career change.**
- ★ Only 40% of employees consider that **their organisation responds “just in time” to their skills development needs.**



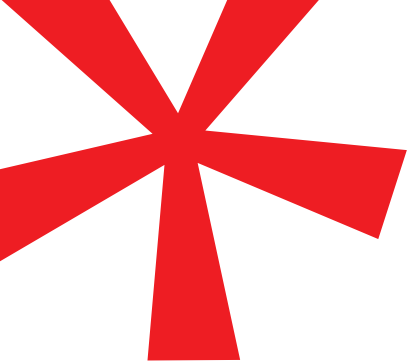
Benoît Félix,

Cegos Group Chairman, has this to say about the 2022 survey:

“As an international leader in Learning & Development, we train and support individuals and organisations on a daily basis to meet their development challenges. There are many transformations at work and all of them involve major issues related to skills development: climate transition, diversity and inclusion, the future and meaning of work, technological impacts on professions, new management models, etc. Behind all these challenges, the central issue is the employability of individuals and the performance of organisations.

Fortunately, companies are now tackling these issues head-on, sometimes under pressure but often voluntarily. We see this in the support we give them in designing and deploying ambitious programmes for upskilling, professionalisation, and reskilling. As for the employees themselves, they are showing an unprecedented interest in lifelong learning. All of this has led to a strong upturn in the training market throughout the world over the past year or so.

Among other consequences, the health crisis has had the virtue of proving to us, if proof were needed, that training is a strategic investment for today and for tomorrow.”



ESSENTIAL POINTS

SKILLS DEVELOPMENT IS INCREASINGLY VITAL IN VIEW OF THE TRANSFORMATIONS TAKING PLACE

- ★ Digital transformation, new ways of working and cyber security: 3 major transformation challenges
- ★ According to HR Directors and HR Managers, 20% of jobs in their organisation are at risk of becoming obsolete in the next three years.
- ★ 37% of the training programmes implemented are upskilling programmes to adapt to changes in the workplace.
- ★ 91% of employees say they are willing to train themselves.
- ★ 78% of employees say they would consider a complete career change if it were more meaningful.
- ★ 84% of HR Directors and HR Managers plan to set up retraining schemes.

“JUST IN TIME” TRAINING TO PERSONALISE AND DIVERSIFY THE LEARNING JOURNEY

- ★ 55% of HR Directors and HR Managers feel that it is difficult to match their organisation's skills needs with their training provision.
- ★ Only 40% of employees consider that their organisation meets their training needs “just in time”.
- ★ Two priority issues, for HR Directors and HR Managers as well as for employees: the personalisation of training paths and the diversification of training methods.
- ★ 11% of HR Directors and HR Managers say they do not use learning data.
- ★ HR Directors and HR Managers monitor two major performance indicators: user satisfaction (for 61% of them) and training outcomes (55%).

SKILLS DEVELOPMENT IS INCREASINGLY VITAL IN VIEW OF THE TRANSFORMATIONS TAKING PLACE

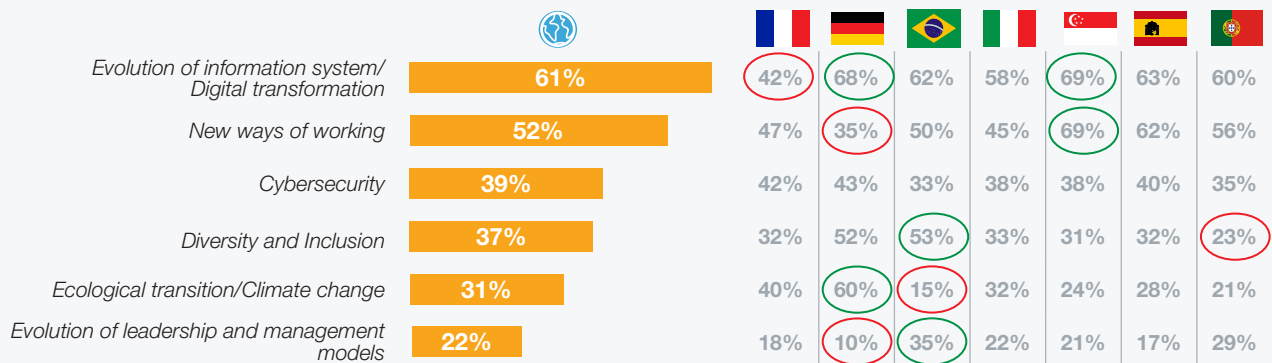
The need for training to adapt to the major challenges of organisational transformation

Technological changes (changes in information systems, cybersecurity) and societal changes (new ways of working, ecological transition) have a major impact on the development of employees' skills.

When asked about the major transformation challenges that will have the greatest impact on the development of their employees' skills over the next two years, **international HR Directors and HR Managers mention above all digital transformation (61%), new ways of working (52%) and cyber security (39%)**. This is consistent with what Cegos is currently observing among its clients, with a growing number of IT projects (proof that digital transformation is not yet complete in many organisations) and training requests linked to changes in working methods (hybrid work, rise in teleworking agreements, agile working methods, etc.). **In France, the ecological transition seems to be more important than elsewhere (for 40% of French HR Directors and HR Managers vs 31% internationally)**.



Which of the following major transformation challenges will have the most impact on your organisation in terms of skills development over the next two years?



Source: Cegos Observatory – October 2022

In view of these major transformation challenges, HR Directors and HR Managers seem to be less apprehensive than before: according to them, 20% of the jobs in their organisation are at risk of becoming obsolete in the next three years. This is 25 percentage points less than in 2021. The reason for this may be the experience gained since the health crisis: successful changes under pressure have reassured organisations of their ability to be resilient and adapt. In addition, in some sectors, HR Directors and HR Managers are now focused on recruitment difficulties, with a strong challenge of attracting and retaining talent.

According
to HRDs-HRMs,

20%

of the jobs in their organisation are at risk
of becoming obsolete in the next three years.



The training programmes implemented respond to three main types of needs; this proportion is stable compared to 2021 and is consistent with the nature of the support projects conducted by Cegos:

- ★ 37% are **upskilling programmes** to adapt to changes in the workplace;
- ★ 36% address **professionalisation challenges** in order to do current work better;
- ★ 27% are **reskilling programmes** to move into a new job.

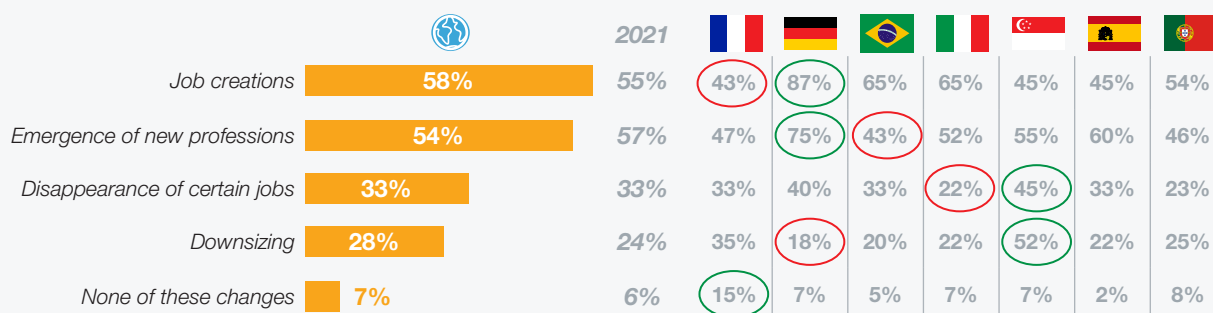
Emerging from the crisis: a calmer state of mind among employees and HR Directors and HR Managers

The transformation of organisations' profiles is continuing, and Strategic Workforce Planning remains a major HR challenge in France and worldwide. Globally, this trend is perceived more as a **creator** (of jobs and new professions) than a **destroyer** (downsizing, disappearance of certain professions, etc.).

Thus, HR Directors and HR Managers anticipate job creation (for 58% of them), followed by the emergence of new professions (54%), and to a lesser extent the disappearance of certain professions (33%). This overall observation is confirmed by the rise in reskilling observed by Cegos, particularly in certain business sectors (e.g. retail).



HR Would you say that, in the next 5 years, your organisation will face:

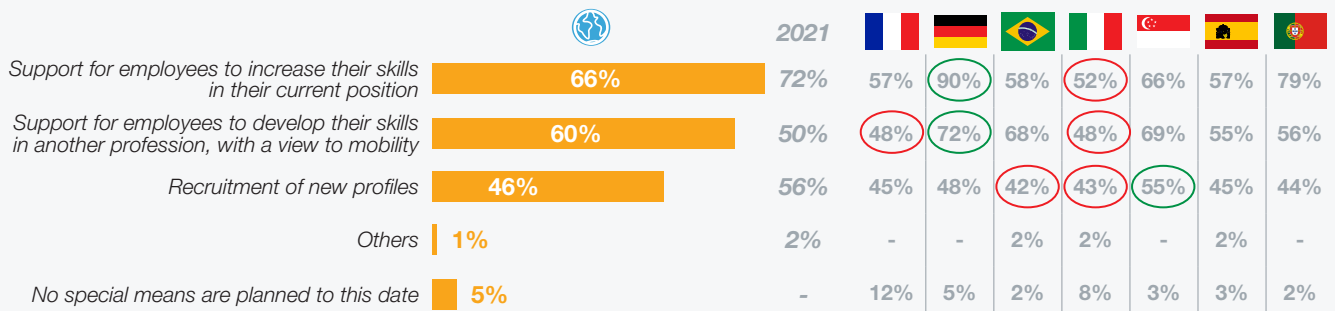


Source: Cegos Observatory – October 2022

In order to deal with the impact of technological change on their organisation's business lines and skills, upskilling (increasing skills in the current position), although slightly down, remains the primary lever that HR Directors and HR Managers plan to use (66%, down 6 percentage points on 2021). Reskilling approaches (development of skills in another job with a view to mobility) are gaining ground, cited by 60% of HR Directors and HR Managers (up 10 percentage points on 2021). There is a strong desire on the part of organisations to increase internal mobility. Perhaps it should also be seen as a remedy for the growing difficulties in recruiting and retaining talent.



What are the means that you are implementing or that you plan to implement to cope with the impact of transformations related to technological development on the professions and skills in your company?



Source: Cegos Observatory – October 2022

Faced with these changes, employees' fear of seeing their job disappear (23%, down 7 percentage points) or change (71%, down 8 percentage points) has decreased significantly.

The end of the health crisis, which generated "pressure" and stress, and a more positive outlook on employment (with a downward trend in unemployment) may explain these changes.

Digital and managerial skills are particularly challenged

While HR Directors and HR Managers and employees agree on the importance of developing soft skills, their priorities are different:

- ★ For employees, priority is given to the organisation of work. In a hybrid environment, employees have to deal with multiple timeframes, multiple locations, multiple information flows... while maintaining a balance between their personal and professional lives. Professional efficiency is therefore key for them.
- ★ For HR Directors and HR Managers, agility/adaptability is cited as the cross-functional skill that their employees must develop as a priority, in relation to the acceleration of transformations and the need to evolve in one's job or towards new jobs.

More generally, digital and managerial skills are particularly challenged, notably because of the hybridisation of working methods. Many organisations are currently revisiting their management models, as Cegos has observed with many of its clients. Thus, 41% (up 8 percentage points on 2021) of HR Directors and HR Managers consider that digital skills must be improved in their organisation, as must managerial skills (39%, up 6 percentage points on 2021). Next come soft skills (36%) and business skills (30%, up 11 percentage points: this increase can be seen in the field with the rise of business academies within organisations).

41%

of HRDs-HRMs consider that digital skills must be improved in their organisation, as must managerial skills (39%).

A marked interest in training among employees

Encouragingly, employees want to take charge of their own lives to cope with these changes: **91% of employees say they are ready to train themselves.** This interest in self-training, which has been constant for the past three years, could lead Human Resources Departments to take on a new role in supporting these initiatives.

In the same vein, **54% of employees say they are ready to finance part of their training costs themselves.** And 76% would be prepared to undertake training outside of their working hours.

54%

of employees are ready to finance part of their training costs themselves.

The “Great Reconversion”?

Covid has revealed that a growing proportion of employees are looking for more meaning in their working lives. This quest is reflected in the survey, **with 78% of employees saying they would be willing to consider a complete career change if it brought greater meaning.**



Employees

The COVID period has revealed a growing share of employees looking for more meaning in their professional lives. For your part, would you be ready to consider a complete professional reconversion if it carried greater meaning?



Total Yes

61%	
60%	
95%	
76%	
82%	
88%	
85%	

Source: Cegos Observatory – October 2022

HR Directors and HR Managers are aware of the issue and are taking action: 84% of HR Directors and HR Managers plan to set up reskilling schemes linked to this demand for meaning. Among them:

- ★ 24% have already implemented retraining measures.
- ★ 37% have plans to do so.
- ★ 23% believe that this is a possibility in the future.



Christophe Perilhou,

Director of Learning & Solutions, Cegos Group, explains:

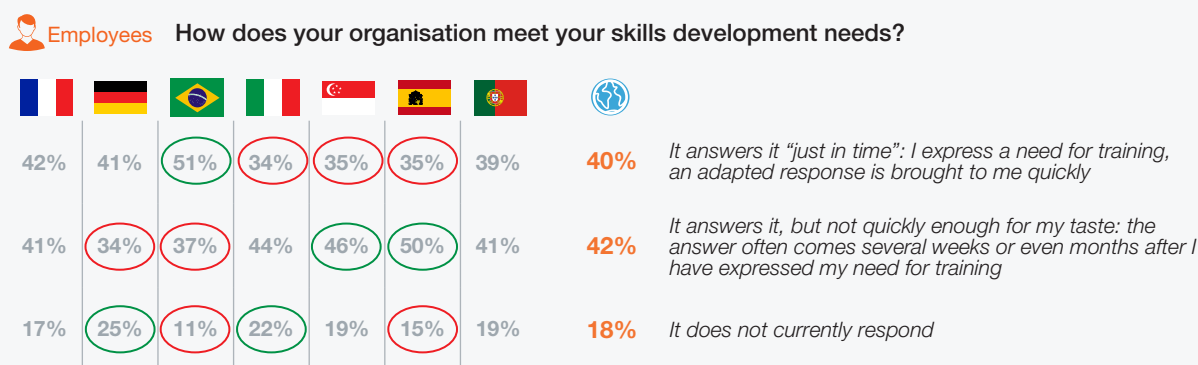
“Faced with the changes underway and the growing interest of employees in developing their skills, organisations must be able to offer a range of dynamic and clear training, mobility and reskilling opportunities. For Learning & Development players, this means anticipating skills needs in order to propose solutions that are in line with strategic human resources planning. Lastly, proactive policies on retraining and funding are imperative to support individual initiatives and develop the employability of each individual.”

"JUST IN TIME" TRAINING TO PERSONALISE AND DIVERSIFY THE LEARNING JOURNEY

The challenge of "just in time" training

55% of HR Directors and HR Managers have difficulty matching their organisation's skills needs with their training offer. The underlying issue is mainly a technological one. For example, Cegos is experimenting with approaches that, via artificial intelligence, would make it possible to recommend training courses based on personalised diagnostics.

As for employees, 8 out of 10 say that their organisation meets their skills development needs. However, only 40% of them consider that it responds "just in time", and 42% believe that the training response comes too late. Thus, the asynchronous and anytime-activated digital training offer that many organisations have made available to their employees does not yet seem to be bearing fruit or meeting all needs.



Source: Cegos Observatory – October 2022

Making the training available even clearer and more visible to encourage commitment

89% of employees say they have a clear view of the skills they have and those they need to improve. Similarly, 89% of HR Directors and HR Managers have a clear view of the skills currently available in their organisation.

If we look at knowledge of available training opportunities:

- ★ **80% of employees have a clear idea of the solutions available to upgrade their skills.**
- ★ **Similarly, 82% of HR Directors and HR Managers have a clear idea of the solutions** available for upgrading skills and supporting their employees to meet the challenges of tomorrow.

On the ground, the Cegos teams have observed that L&D decision-makers are paying more attention to the marketing of the training programmes and to the communication plans that accompany the skills enhancement programmes, in order to make them more understandable and thus encourage greater employee engagement.

For

59 %
of HRDs-HRMs

and

64 %
of employees,

skills development is a shared responsibility between the company and the employee.











This issue is all the more important for the future as skills development is increasingly seen as a shared responsibility between the company and the employee. This is the case for 59% of HR Directors and HR Managers (up 14 percentage points on 2021) and for 64% of employees. The commitment of employees to training is therefore reflected in the growing awareness of HR Directors and HR Managers of the need to involve and empower employees more and more in the development of their skills.

Developing the training offer: a process influenced as much by the organisation's strategy as by individual needs

To build their training programmes, HR Directors and HR Managers say that they rely on four inputs: their organisation's employment and skills challenges, its strategy, individual needs and the needs of the business lines.

HR What is your basis today to build your training offer?

								
<i>It is a variation of the company's strategy</i>	25 %	24%	25%	22%	29%	21%	29%	21%
<i>It is built according to the feedback of individual needs</i>	25 %	31%	26%	24%	23%	20%	21%	31%
<i>It is built according to the challenges of jobs and skills within my organisation/company</i>	26 %	24%	22%	28%	28%	33%	25%	25%
<i>It is built according to feedback from business needs</i>	24 %	22%	27%	26%	20%	26%	26%	23%

Source: Cegos Observatory – October 2022

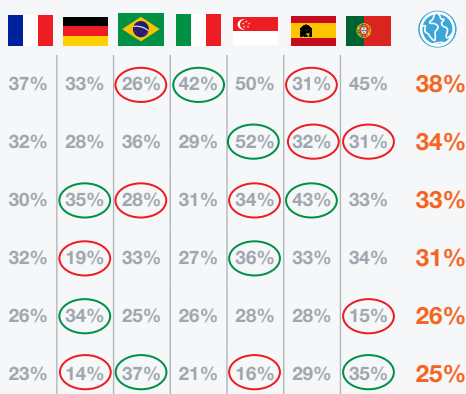
HR Directors and HR Managers are thus seeking to satisfy both the strategic alignment requested by management and the individual needs on the ground.

Training challenges for the future: individualisation and diversification of methods & formats

So how should training evolve? **Two priority areas appear, for HR Directors and HR Managers and employees alike: individualisation of training paths and diversification of training methods.** We also note that after two years of health crisis, distance learning is much less popular.

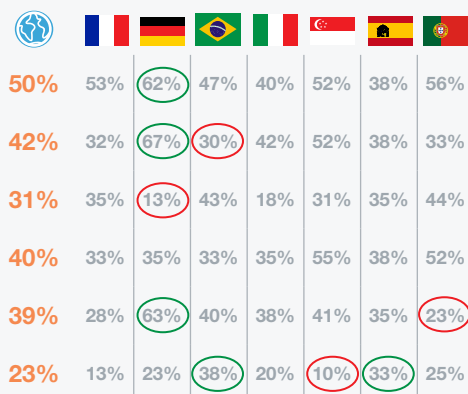
Employees

To develop your skills, how should the training offered by your company evolve?



HR

In your opinion, how should your training evolve?



Source: Cegos Observatory – October 2022

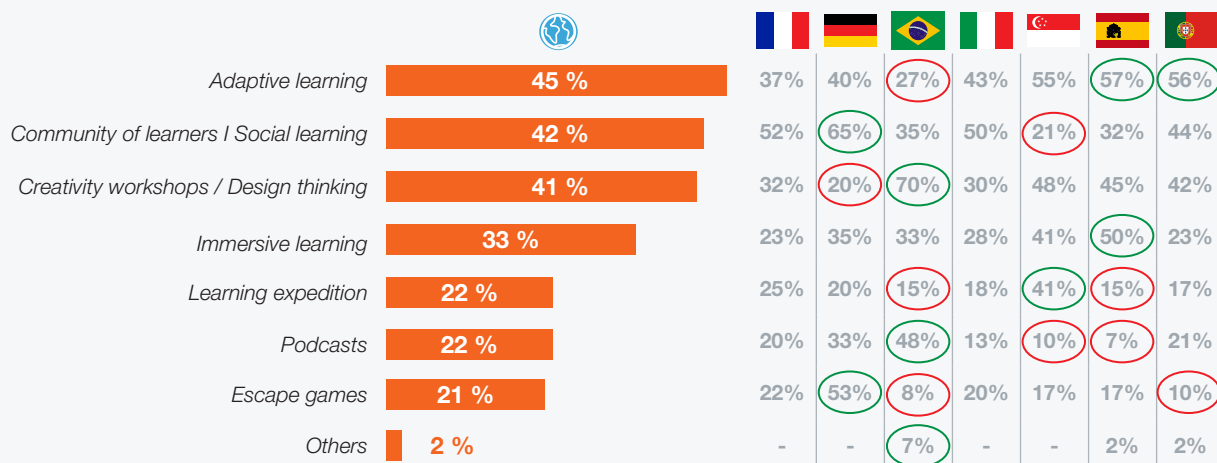
On the ground, blended and online distance learning are still favoured by HR Directors and HR Managers. 60% of them (up 10 percentage points on 2021) have set up online distance learning courses in the last two years, 49% blended courses, and 41% classroom-based courses.

The new training methods will be centred on the individual

Among the new training methods, three seem to be arousing growing interest among HR decision-makers, in line with their desire to individualise courses and diversify training methods.

HR

Which of the following new training modalities are you using today or are you planning to use in the short term?



Source: Cegos Observatory – October 2022

Tomorrow's methods will therefore be more centred on the individual, their personal learning experience and their social interactions. They require technological investments in artificial intelligence, particularly for the implementation of adaptive learning.

Social learning is particularly popular, especially informal learning, in the workflow. This also goes hand in hand with the desire for greater autonomy on the part of employees in developing their skills.

Lastly, with design thinking, educational design approaches are inspired by innovation approaches, mobilising a collective intelligence focused on the needs of the end user.

Learning data: an essential lever... and still little used

To implement some of these new methods, L&D decision-makers must be able to rely on learning analytics, which are becoming increasingly numerous due to the digitalisation of practices.

In fact, while 11% of HR Directors and HR Managers say they do not use them, 24% plan to use them tomorrow.

11% of HRDs-HRMs say they still do not use learning analytics.

Today:

- ★ 16% of HR Directors and HR Managers say they use learning analytics to manage their training offer,
- ★ 37% to improve the learning experience,
- ★ and 12% to strengthen the individualisation of training courses.

The use of data is still fairly limited. Knowing that data analysis and exploitation will shape L&D activities in the future, let's hope that HR Directors and HR Managers are not too slow to grasp this matter.

Finally, HR Directors and HR Managers are currently monitoring two major performance indicators: user satisfaction (61% of HR Directors and HR Managers) and training outcomes (55%). Even if satisfaction assessment is important, it reflects a still "consumerist" view of training. It is one thing for users to be satisfied with their training, but it is quite another for them to apply what they have learned with tangible results on their operational performance. This is what training investment is all about. HR Directors and HR Managers will therefore have to seize on indicators correlated with performance in the workplace if they want to create more value.



Grégory Gallic,

Manager of the "Learning Engineering and Professional Effectiveness"
Offering and Expertise, Cegos Group, explains:

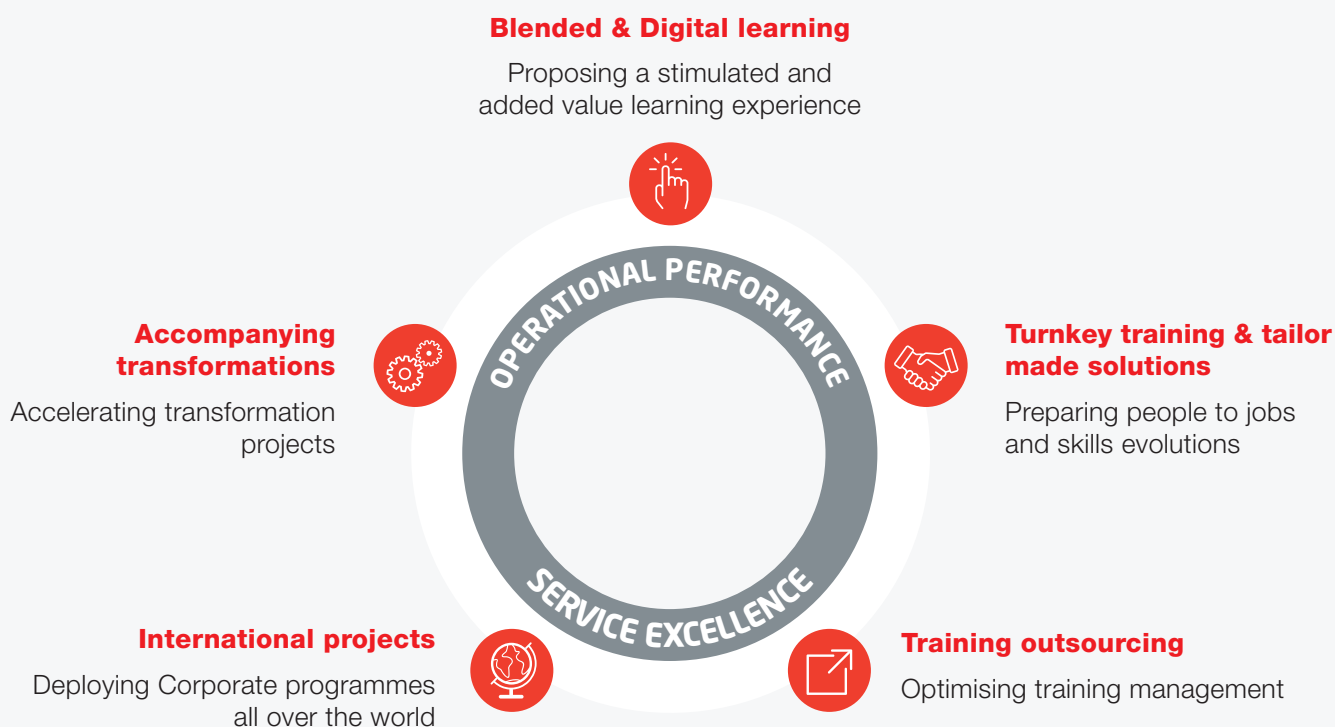
"Since employees have a growing interest in training, it would benefit L&D decision-makers to better market their training offer. They could thus encourage the emergence of 'serial learners' who are able to encourage their other colleagues.

The other major challenge concerns the introduction of a genuine culture of measuring the impact of training on operational performance. This requires the use of learning data, which is currently under-exploited, particularly in France. The use of learning analytics is a prerequisite for the implementation of new training methods. They allow us to better understand the behaviour and needs of users (design thinking), to individualise courses with the help of artificial intelligence (adaptive learning), and to help people connect to help each other on a daily basis (social learning)."



CEGOS IS AT YOUR SIDE TO ADDRESS YOUR SKILLS CHALLENGES

Cegos, your global Learning & Development partner



What makes us **stand out?**

L&D Full Service Provider

We support you along the entire Learning & Development value chain (design, deployment, management), while always keeping in mind the need to boost your performance.

Leading and reliable expert

For nearly a century, we've offered reliability and security to our customers. As we stay in direct contact with companies and their developments, our solutions are pragmatic and results oriented. This approach allows us to measure the impact of training and optimise your L&D investment.



Our five assets to contribute to your company's performance

- 1.** Guidance towards the right packaged or tailor-made solution
- 2.** Support and advice to maximise your L&D investment
- 3.** Products and Services excellence
- 4.** Optimal use and integration of digital technology
- 5.** International support and roll-out

Our four beliefs for transforming learners' practices

- 1.** Commitment and learning over a period of time
- 2.** Human interactions
- 3.** Personalised experience adapted to the requirements of everyone
- 4.** On-the-job transfer to encourage the implementation of new skills

International partner

Our global footprint as well as our worldwide and multilingual solutions allow us to work with a portfolio of major international customers.

At the forefront of innovation

We use innovation to enhance your experience:

- ✱ Supporting organisations and individuals in the face of changes in both the economy and work,
- ✱ Fostering learner engagement over time through personalised pathways,
- ✱ Using digital learning to boost performance.

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