

# TRANSFORMATIONS, SKILLS & LEARNING



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## With French origins and an international culture, the Cegos Group has always been a keen observer and dedicated player in work and business.

As a European and global leader in Learning and Development, the group continually innovates to guide and support companies as they evolve, and stimulate learners' personal and professional development.

### By turning skills into performance, Cegos leads its clients «Beyond knowledge».



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

# 20,000

corporate clients

# + 3,000

pieces of multilingual digital content available

# +350,000

active users on the LearningHub@Cegos



Studies and publications



The digital revolution and its underlying technology disruptions are sparking far-reaching changes in workers' skills, whether technical, behavioural or line-of-business related.

The Cegos Group is here to guide and support you through this deep-seated change, which extends beyond the business world to impact our societies at large.

- \* Receiving the appropriate training and acquiring the necessary agility in the workplace is a crucial challenge for workers around the world. Ongoing skills development, particularly those that will prove indispensable tomorrow, is a crucial factor for future employability.
- \* Learning & Development is a strategic investment for businesses, since employees' ability to keep up with the latest developments is a major factor in a company's attractiveness and competitiveness.

The Cegos Group addresses these challenges by rolling out solutions designed to give learners a unique, tailored experience with lasting benefits that will feed into the company's performance.”

The Cegos Group, an international leader in Learning & Development, releases the results of its international survey **“Transformations, skills & learning”**. In July, the 2021 survey polled 2,643 employees and 365 HR Directors/Managers or Training Directors/Managers (HRDs), all working in private- and public-sector organisations employing fifty employees or more, in six countries in Europe (France, Germany, Italy, Spain), Asia (Singapore) and Latin America (Brazil).



Germany



Italy



France



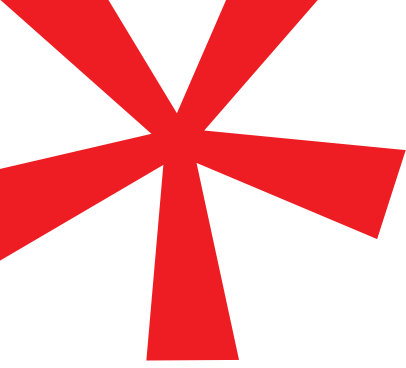
Spain



Singapore



Brazil



## KEY POINTS

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### Despite the health crisis, organisations have continued their training efforts

- \* 93% of HRDs say they have significantly adapted their training offer since March 2020.
- \* 52% of employees took the initiative for the training they received (compared to 48% for whom the training was imposed).
- \* 50% of HRDs have implemented online remote learning and 48% have implemented blended learning.

### Strategic Workforce Planning at the heart of HR challenges to address the issue of skills obsolescence

- \* According to the HRDs polled, the skills used in 45% of the jobs in their organisation could become obsolete in the next three years.
- \* 45% report increasing difficulty in matching their organisation's skills needs with their training offer.
- \* 72% of HRDs consider that proficiency in basic skills a major HR objective.
- \* Digital communication, remote collaboration and agility/adaptation are the top three skills that HRDs believe employees should be proficient in.

### Clear-sighted and pragmatic in the face of ongoing transformations, employees want to train


- \* 64% of employees and 45% of HRDs consider that skills development is a shared responsibility between the company and employees.
- \* 76% of employees say they would willingly attend a course in their own time.
- \* For employees as well as HRDs alike, the three main drivers for learner engagement are rooting the training in a real work situation, facilitating access to the training content, and providing access to educational resources at any time on a multi-device basis.



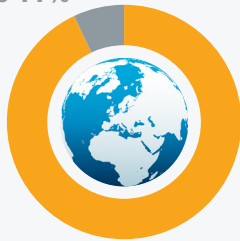
## DESPITE THE HEALTH CRISIS, ORGANISATIONS HAVE CONTINUED THEIR TRAINING EFFORTS

### Adapting the offer, continuing the training effort

Since the beginning of the Coronavirus crisis in March 2020, 93% of HRDs say they adjusted their online training offer to continue training their teams. For 63% of them, more than 50% of the offer has been adapted/renewed.

 **HR** During the Coronavirus crisis, did your company adjust its training offer (for example, on line training) to continue training its teams, or has it done so since?

No 11%



Yes  
93%



92%



93%



89%



93%



95%



98%

Source: Cegos Observatory – 2021 International Barometer Survey

The training effort has thus been pursued: in the majority of cases, 30 to 60% of the organisations' workforce has benefited from training since March 2020.

As for the **employees**, a trend is emerging: increasingly, they **are the ones who initiate the training they receive**. This is the case for 52% of employees. Employee initiative is highest in Brazil (61%) and lowest in Italy (41%).

 **Employees** What led you to do the training courses you have participated in over the past two years?

They were proposed to me/imposed upon me  
48%



It was basically on my initiative  
52%



49%



41%



54%



53%



54%



61%

Source: Cegos Observatory – 2021 International Barometer Survey

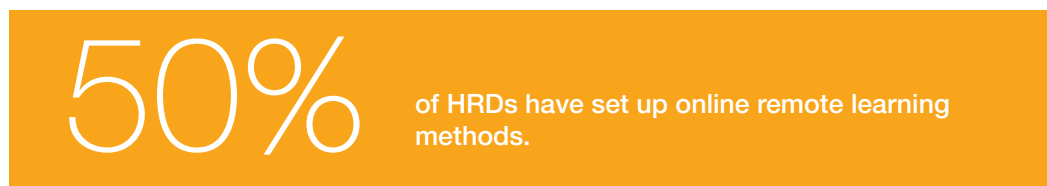
# 93%

of HRDs adjusted their online training offer to continue training their teams since the beginning of the health crisis.

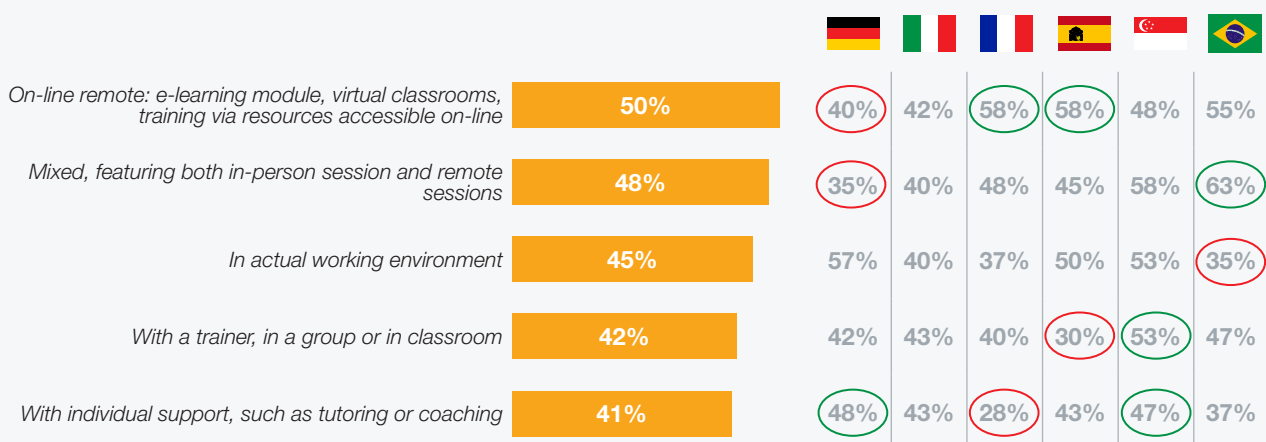
## The crisis has accelerated the rise of blended and distance learning

Unsurprisingly, the crisis has accelerated the already observed trend of increasing remote and blended learning.

As a result, 50% of HRDs have set up online remote learning methods and 48% have set up blended learning solutions comprising both classroom training and remote learning. In Brazil (63%) and Singapore (58%), blended or hybrid training was most often implemented. **The health crisis has played a major role in accelerating the trend towards remote learning.**



### HR Which of the following training methods have applied within your company since 2020?



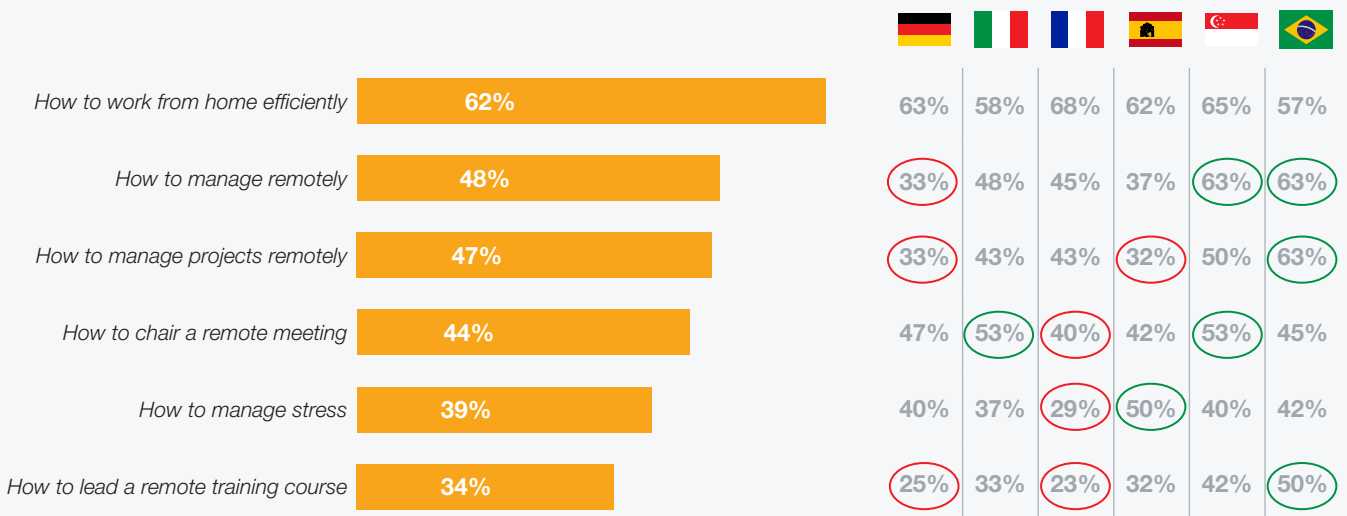
Source: Cegos Observatory – 2021 International Barometer Survey

**More specifically, virtual classrooms were strongly favoured** by 79% of HRDs (by 69% of French HRDs, and even 93% of their Brazilian counterparts), as were e-learning modules, favoured by 59% of HRDs (52% in France, compared to 40% in Brazil and 90% in Singapore).

**The training topics have been directly correlated to the challenges and impacts of the health crisis:** “how to work from home efficiently” was the most frequently deployed topic since March 2020, followed by “how to manage remotely” and “how to manage projects remotely”:

“How to work from home efficiently”  
was the most frequently deployed training topic since March 2020

 HR The training courses concerned the followed topics...



Source: Cegos Observatory – 2021 International Barometer Survey

Remote learning is now part of a sustainable trend: a total of 86% of the HRDs say that the training courses organised by their company/organisation would place greater emphasis on remote learning than before the health crisis. In Germany, the scores are somewhat lower (78% for employees and HRDs).

“**Christophe Perilhou,**

Learning & Solutions Director, Cegos Group, explains:

“The health crisis has accelerated underlying trends already present in training. However, the new remote solutions require that the trainers themselves be supported in their efforts to improve their skills. The quality of the delivery of these digital/online training courses is key for the months and years to come.

New themes have also emerged or are gaining momentum: remote management and sales, proficiency in collaborative tools, stress management. They illustrate perfectly the challenges of hybrid management, which must take into account the specific features of new ways of working.”



# STRATEGIC WORKFORCE PLANNING

## AT THE HEART OF HR CHALLENGES TO ADDRESS THE ISSUE OF SKILLS OBSOLESCENCE

### The risk of skills obsolescence is still high

Already noted last year, the risk of skills obsolescence is a reality: on average, according to HRDs, 45% of the jobs in their organisation present a risk of skills obsolescence in the next three years. There are few disparities between countries: from 40% in France to 51% in Spain.



In your organisation, what is the proportion of jobs for which, in your opinion, there is a risk of skills obsolescence within 3 years?

On average, according to HRDs



**45 %**

of jobs have a risk of skills obsolescence in the next 3 years.



44 %



47 %



40 %



51 %



44 %



41 %



If it is assumed that all your employees must be trained in order to progress, indicate the proportions in which you would train them on the following issues:



**36 %**

Training to adapt to changes in the workstation



37 %



31 %



37 %



38 %



35 %



38 %



**37 %**

Training to do the current job better



36 %



41 %



36 %



37 %



38 %



37 %



**27 %**

Training to be able to access a new job



27 %



28 %



27 %



25 %



28 %



25 %

Source: Cegos Observatory – 2021 International Barometer Survey

The training effort is therefore vital to equip employees with the skills that are essential for the future. For HRDs, 36% are concerned with training employees to adapt to changes in their jobs and 37% with making them do their current jobs better. Lastly, for 27%, it is a question of training them to help them enter a new job.

More generally, Strategic Workforce Planning remains at the heart of HR challenges. HRDs state that in the next five years, their organisation will be confronted with job creation (57%), the emergence of new professions (55%), the disappearance of certain professions (33%), and job cuts (24%). HR will thus have to respond to a twofold problem: adjusting the organisation (staff cuts, job losses), and finding the right people for the new jobs and job creations.

Disparities can be observed by country: in Singapore, the emergence of new professions and job creation are identified by 72% and 67% of HRDs respectively. Job cuts are highest in Brazil (28%) and lowest in Germany (13%).



### Growing difficulty in matching skills needs with the training offer

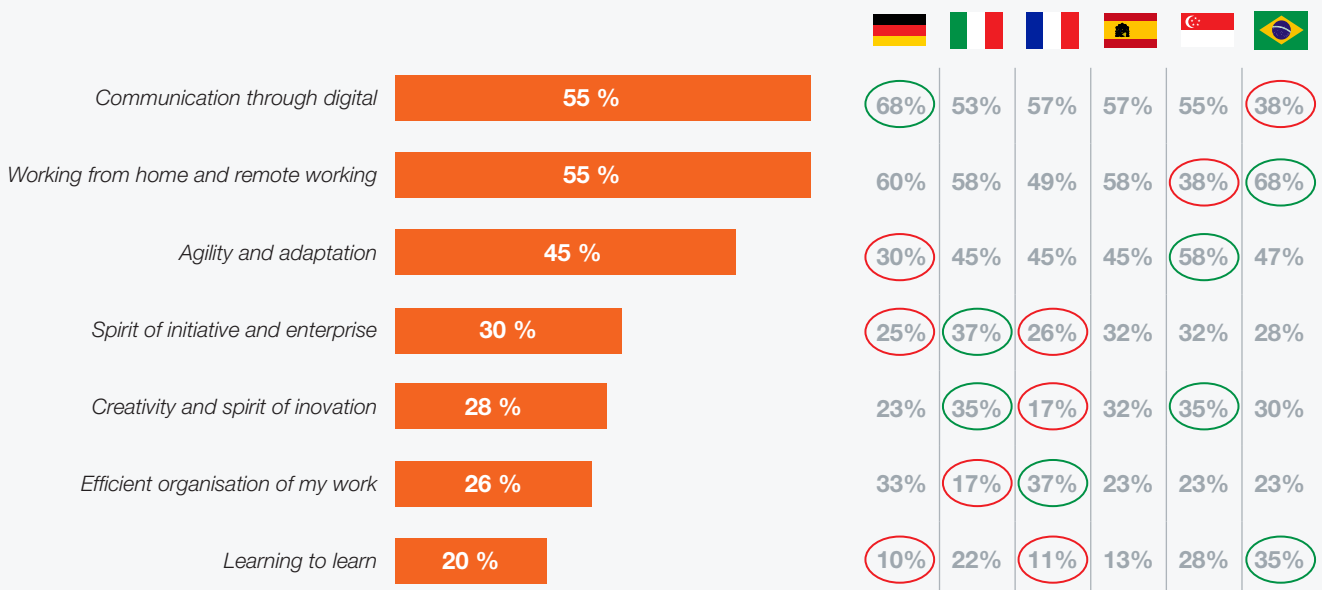
45% of HRDs report increasing difficulty in matching their organisation's skills needs with the training offer.

Concerning the nature of the skills to be developed:

- **72% of HRDs** consider that proficiency in **basic skills** (reading, writing, counting, working in a team, complying with health and safety rules) **a major HR objective in their organisation.**
- **75% of HRDs** say that proficiency in **basic digital skills** a major HR objective. There are considerable differences from one country to another: France 88%, Spain 83%, Germany 80%, Italy 72%, Singapore 67%, Brazil 60%.
- **Regarding the soft skills to be learned as a priority**, international HRDs agree on the following Top 3: **digital communication, remote collaboration, agility/adaptation.**
- **Lastly, it is digital skills that must be strengthened according to HRDs** (33%), as well as managerial skills (33%), followed by soft skills (28%) and the business skills of employees (19%).



In your opinion, from among the following behavioural skills (or “soft skills”), which one should be mastered by the employees of your company as a priority (maximum of 3 answers)



Source: Cegos Observatory – 2021 International Barometer Survey

## Employees are very aware of the impact of current changes

Employees are well aware of the impact of current changes on their profession and their professional life:

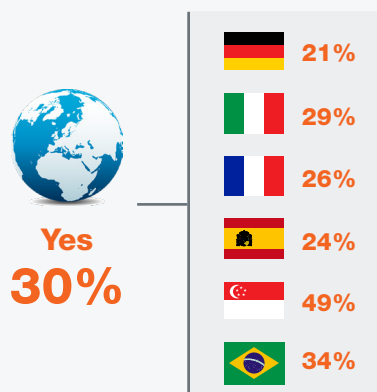
- **30% of employees fear that their profession will disappear.** This fear is particularly strong among manual workers (39%), whose jobs are particularly threatened by artificial intelligence, and for whom reskilling is a crucial issue.
- **79% of employees think that transformations link to technological advances could change their job content.** The threat here is more clearly identified by supervisors (83%) and managers (80%), whose jobs will be transformed and for whom the issue is more that of upskilling.



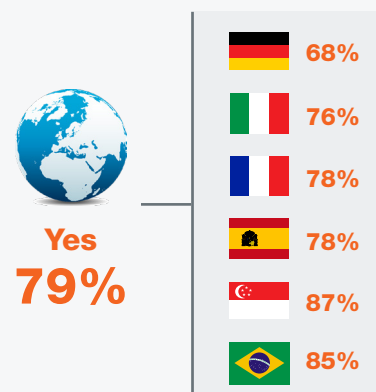
Employees

Do you think that the transformations linked to technological developments (artificial intelligence, automation, etc.)...

... could make your job disappear



... could change the content of your job




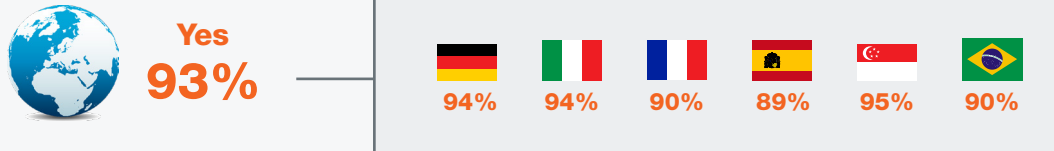
Source: Cegos Observatory – 2021 International Barometer Survey

This data should be correlated with the perception of technological advances: 29% of employees feel they are being 'overwhelmed' by technology.

On this point, HRDs are even more concerned than the employees themselves: 52% of them think their employees feel 'overwhelmed' by technology.

Faced with all these challenges of adaptation and skills development, there is good news: 93% of employees say they are willing to undertake their own training in order to adapt to transformations in jobs and professions.

 **Employees** Are you ready to undertake your own training to adapt to changes to job and professions?



Source: Cegos Observatory – 2021 International Barometer Survey

### Upskilling and reskilling: two levers to meet the skills challenge

As far as HRDs are concerned, priority is given to upskilling and reskilling:

- 72% of them plan to **help employees to develop their skills in their current position;**
- 56% intend to **recruit new profiles;**
- 50% want to **help employees to develop their skills in another profession;**
- And only 2% do not envisage any particular means, proof that awareness is well shared within the profession.

# 72%

of HRDs plan to help employees to develop their skills in their current position.

Lastly, it should be noted that within organisations, HRDs must now deal with the business departments, which are getting increasingly involved in the issue of skills: 78% of HRDs consider that operational departments (business departments) are increasingly involved in team training activities, putting increasing pressure on HR departments.



**Christophe Perilhou,**

Learning & Solutions Director, Cegos Group, explains:

*“The speed of transformation of organisations is accelerating, with a central issue for human resources and training departments: managing to deploy a culture of continuous learning to ensure a rapid and easily adaptable increase in skills. This implies designing and implementing much more solid learning ecosystems.*

*In addition, skills are strongly challenged by the transformations underway. Whether it is a question of adaptation or retraining, companies must be able to train on a large scale and in a short time. It is often professional transitions that will have to be supported; long training cycles and diploma courses must be given particular importance here as they can be an essential springboard for retraining.*

*Finally, Learning & Development players have every interest in strengthening their position as business partners with operational management: in order to keep control of skills development, they must be more in sync with rapid business cycles. This requires supporting them in redefining their positioning, their offers and their processes.”*



## CLEAR-SIGHTED AND PRAGMATIC IN THE FACE OF ONGOING TRANSFORMATIONS, EMPLOYEES WANT TO TRAIN

Skills development is a responsibility shared by the company and employees: at global level, this is true for 64% of employees and 45% of HRDs. This co-responsibility implies responding to employees' interest in training, since they will increasingly have to take responsibility for their own development.

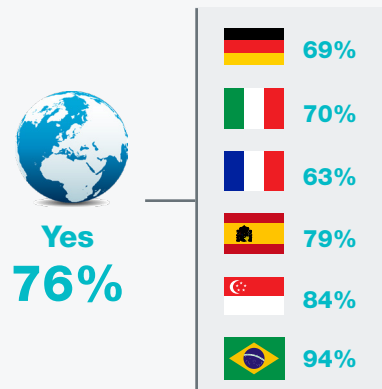
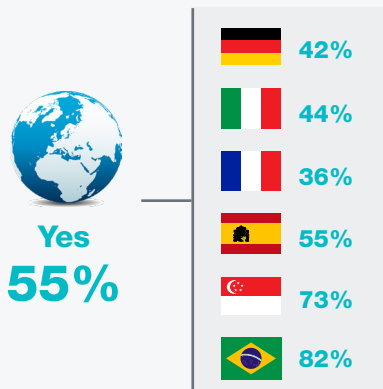
In fact, **76% of employees say they would be willing to attend a course in their own time** (94% in Brazil, 84% in Singapore, 79% in Spain).

Similarly, **55% of employees say they would be willing to finance part of the cost of their training themselves**, although there are differences between countries (Brazil 82%, Singapore 73%, Spain 55%, Italy 44%, Germany 42%, France 36%).

Would you be willing to finance part of your training costs yourself?



Would you be willing to do a training course in your personal time (and not during your working hours)?



Source: Cegos Observatory – 2021 International Barometer Survey

Employees are therefore aware of the need for training and are keen to learn. They also agree with HRDs on the development of training offered by their organisation. Thus, employees and HRDs believe that training in real work situations should be prioritised.

**“ Isabelle Drouet de la Thibauderie,**  
Human Resources Expertise and Offer Manager, Cegos Group, explains:

*“In terms of training, the health crisis has had several undeniable positive effects. It has accelerated the evolution and digitisation of training offers and has highlighted the usefulness of training in adapting to current changes. Employees are aware of the need for regular training and are keen to do so.*

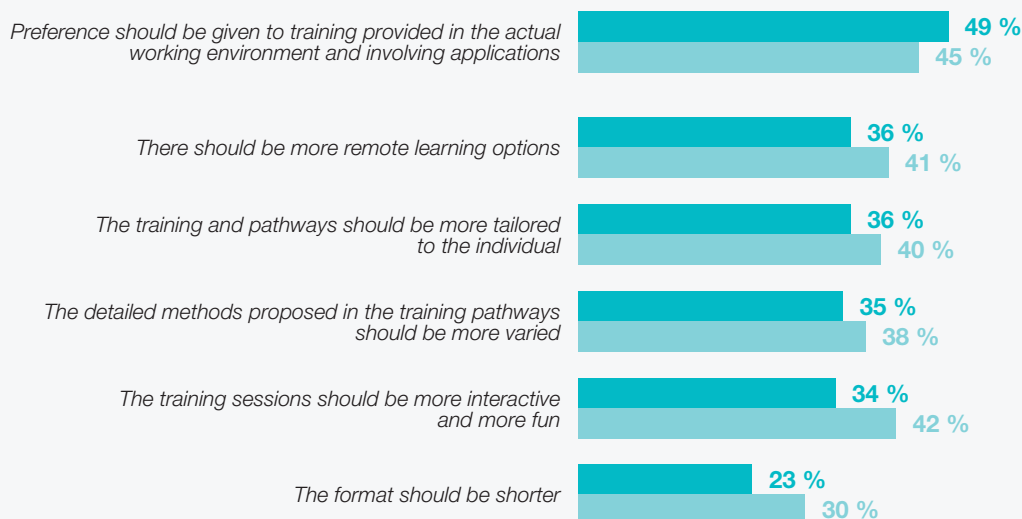
*For organisations, this means finding a real balance between prescribed training and that which is freely chosen by employees, and also improving the quality of design and delivery of key formats such as virtual classrooms. It also means individualising the training courses ‘for real’, with training carried out as close as possible to work situations for greater operational impact, gamification solutions and objective and effective individual evaluation measures.”*



**To develop your skills, how should the training offered by your company now change?**



**In your opinion, how should the training develop?**



Source: Cegos Observatory – 2021 International Barometer Survey

In addition, **employees and HRDs agree on the drivers for learner engagement, stressing the importance of rooting the training in a real work situation, facilitating access to the training content, and providing access to training resources at any time on a multi-device basis.**

**Employees and HRDs also agree on the quality of the training offered by their organisation:**

- **The training received is useful** for 80% of employees and 89% of HRDs;
- 78% of employees and 83% of HRDs agree that it is **relevant**;
- **The effectiveness of training solutions needs to be improved:** 71% of employees and 80% of HRDs consider the training offered to be effective.

**Lastly, the average satisfaction of employees with the training provided by their company remains stable and is well evaluated by HRDs:** employees give the training a score of 7.4/10, while HRDs also give their employees a score of 7.5/10. Satisfaction is highest among Brazilian employees (7.9) and lowest in Italy (7).



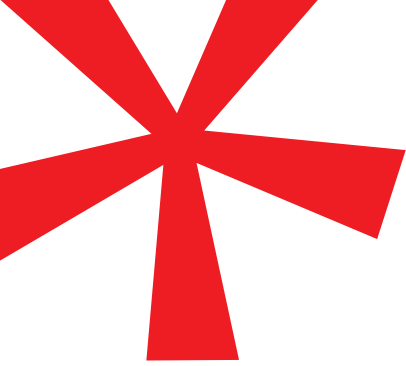
**Benoit Felix, CEO of the Cegos Group,**

comments on this 2021 International Barometer Survey:

*“As an international leader in Learning & Development, we have been able to observe, for the past 18 months, in all the countries where we operate, the same urgency to respond to the challenge of skills in order to face the transformations of the employment and labour market. This desire is shared by companies and employees alike.*

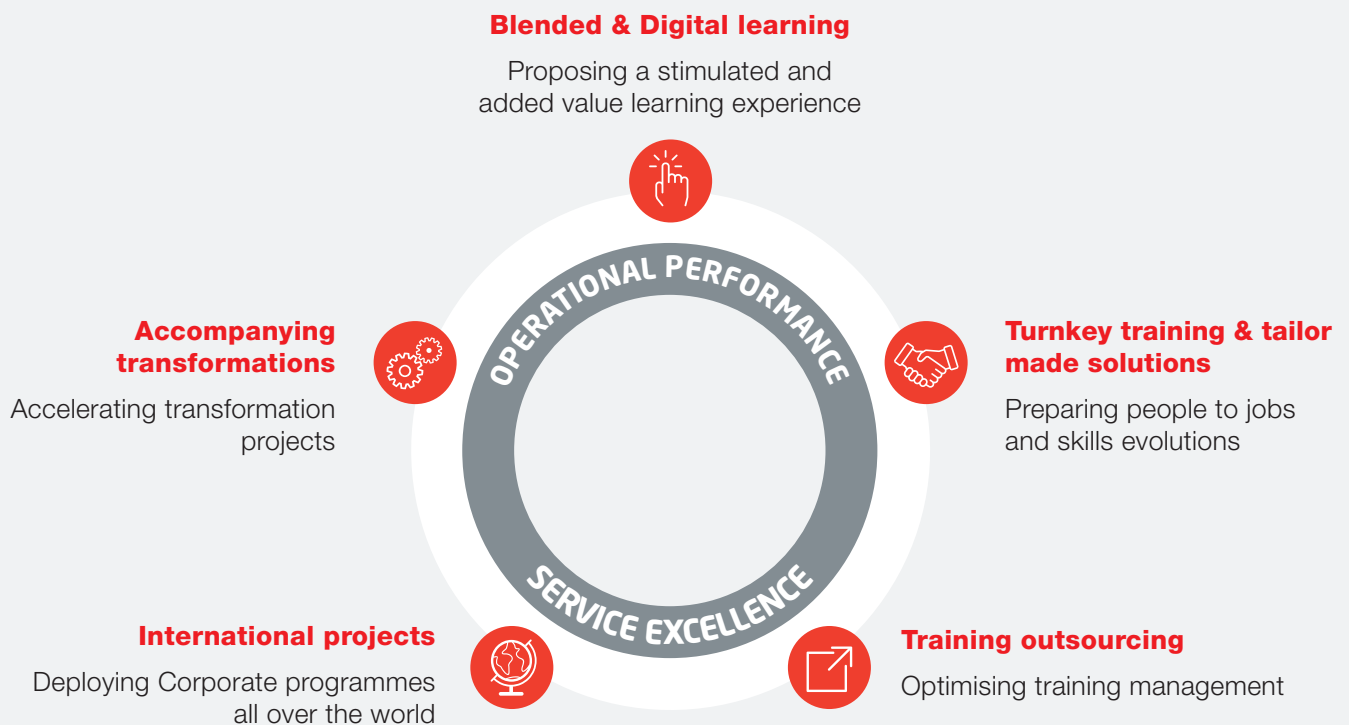
*Like any major crisis, the pandemic also holds its share of opportunities: it has enabled organisations to develop their offerings, to accelerate the digitalisation of their solutions and to roll out new formats on a large scale that are rapidly adopted by learners. Companies have not abandoned their training efforts, quite the contrary. And the employees showed a real desire to learn. Skills development is a strategic lever, as the crisis has shown, and there is no longer any doubt about it!*

*All the stakeholders (employees, companies, public authorities, training organisations, etc.) are aware of the risk of skills becoming obsolete, which means that we need to think about and deploy very quickly upskilling and reskilling programmes that are increasingly detailed, individualised and effective.”*



## CEGOS IS AT YOUR SIDE TO ADDRESS YOUR SKILLS CHALLENGE

### Cegos, your global Learning & Development partner



### Blended learning: combining the best of digital and face-to-face learning

By choosing Cegos, you benefit from an innovative teaching method with blended solutions, combining face-to-face and distance learning. Our objective is to provide added value for the individual and the company, with a focus on the operational impact.

Cegos' training offer is currently the largest and most comprehensive on the market, with nearly 1,000 business, cross-functional and sector-specific training titles available for your employees or teams.

Cegos also has a wide range of certifications in the main skills areas.

With more than 3,000 external trainers, Cegos has the largest network of accredited trainers.



## 100% distance learning solutions

The multitude of our content and diversity of our 100% distance learning solutions meet all types of needs:

- \* Virtual Classroom Training: the face-to-face environment with the advantages of digital technology.
- \* Full Digital: our most popular learning courses in full distance format.
- \* 3h Chrono: a virtual classroom in 3 steps to acquire a targeted skill.
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And for your tailor-made training courses, consider the design of training programmes, or the conversion of existing ones, in a 100% remote format! Our experts can help you by combining pedagogical efficiency and operational impact.

## Train in complete autonomy with the **LearningHub** platform @Cegos

This online platform is available on computers, tablets & smartphones and provides access to all learning courses for a complete Cegos Learning Experience.

- \* **The learner** has access to their training programme, their learning history, dynamic conversation spaces and self-directed activities to be carried out over time.
- \* **The trainer** leading the training course, either face-to-face or in the virtual world, monitors each learners' progress.
- \* **The company** has access to several performance indicators to monitor the progress of their participants in real time.

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BEYOND KNOWLEDGE\*