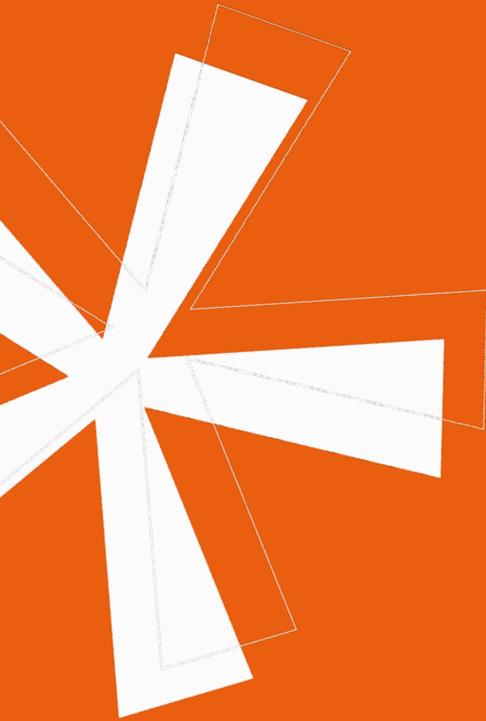


CEGOS' EUROPEAN RESEARCH

PRESS RELEASE

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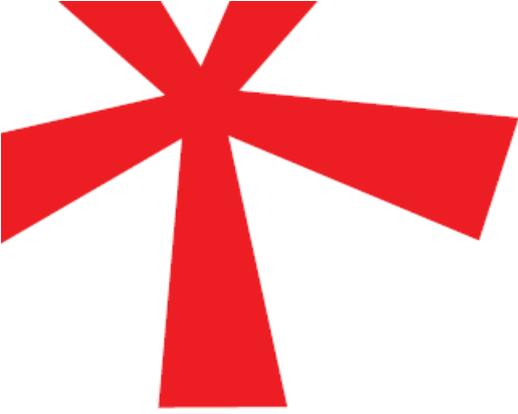


Transformation, Skills & Learning: how to address the future?

Key findings



BEYOND KNOWLEDGE*



Cegos Group, international leader in professional and life-long training, has today unveiled the results of its international survey "**Transformation, skills and learning: how to address the future?**".

The 2018 survey polled **2,227 employees and 316 HR & Learning Directors**, all working in private-sector companies with 50+ employees in five countries: France, Germany, Italy, Spain and the UK.

Key findings at a glance

Technological developments and their impact on the management of human resources:

- * **89%** of European employees think that technological developments could change the content of their work

Strategic skills for the future:

- * **49%** Flexibility and adaptation
- * **45%** Learning to learn
- * **41%** Efficient organisation of work

Professional training: perception and usage

- * **53%** of European employees would be willing to finance part of the cost of their training
- * **79%** of European employees would be willing to take training outside of their work time

TECHNOLOGICAL DEVELOPMENTS AND THEIR IMPACT ON THE MANAGEMENT OF HUMAN RESOURCES

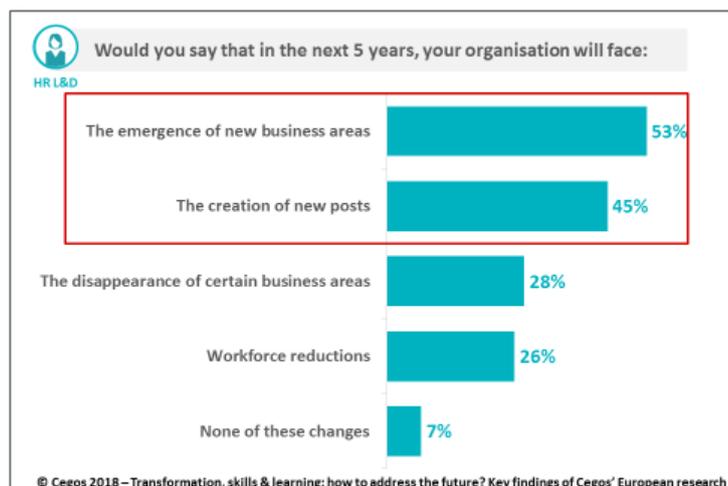
89% of European employees think that technological developments could change the content of their work

In Europe, employees and HR & Learning Directors share the same lucidity in regard to the impact of technological developments on employment and HR management:

- ★ 82% of European employees think that, over the next five years, technological developments will impact their current job. Only 29% of them feel left behind by technology.
- ★ 89% of European HR & Learning Directors believe technological developments will impact the management of HR within their organisation.

More specifically, 89% of European employees think that technological developments could change the content of their work and 35% think that technological developments could make their position disappear. These figures probably indicate that the far-reaching changes in progress are generating considerable anxiety among workers.

If we look at the sort of impacts these changes are having, HR & Learning Directors expect the outcomes to be more creative than destructive – a rather positive outlook that runs counter to general opinion.



A total of 90% of European HR & Learning Directors say they are preparing for these changes, a figure that is consistent across companies of all sizes.

Employees, for their part, would appear to be less optimistic (or more realistic?) than HR & Learning Directors, given that 59% of them believe their company is currently taking action to anticipate the impact of these technologies on jobs and business areas. However, a comparison of the responses of managers (70%) and non-managers (45%) suggests that the level of optimism varies.

Another interesting finding is that training is identified as the main tool to cope with these changes. It is the most popular choice among HR & Learning Directors (79%), followed by job restructuring (55%) and recruitment (42%). The Human Resources Department is cited by HR & Learning Directors as the most involved stakeholder in analysing the impact of technological developments on HR management (82%), ahead of the Chief Executive Office (55%) This latter figure is significant because it also reflects an awareness of the need to develop a culture of learning that is fully engaged with the company's business.

Christophe Perilhou, Learning & Solutions Director at Cegos Group, explains:

"Companies are now at a moment of truth where they are facing a major dilemma:

- on one hand, a vital need to invest in ongoing skills adjustment;
- on the other hand, a temptation to cut back on their investment in skills development, because of the regulatory context or short-term economic considerations.

At Cegos, we strongly believe that anticipating skills requirements is a major competitive asset. And we see this happening among our key accounts: digital transformation and the need to reorganise are prompting an in-depth analysis of the jobs affected and the introduction of measures to boost employability for the common good of the employees and the companies."

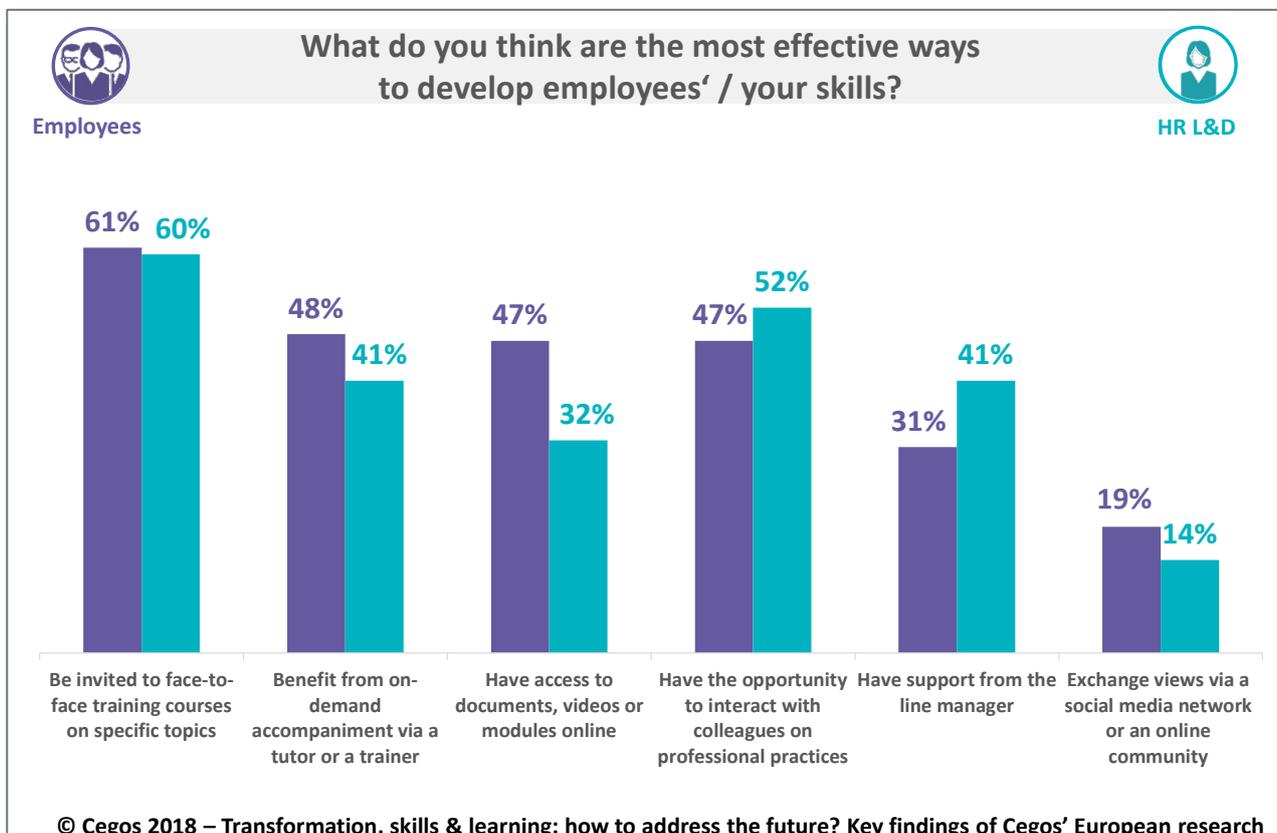
STRATEGIC SKILLS FOR THE FUTURE

Flexibility and adaptation (49%), learning to learn (45%), efficient organisation of work (41%).

When we ask HR & Learning Directors **what behavioural skills the employees in their organisation should master first**, they lean towards long-term skills such as flexibility and adaptation (49%), learning to learn (45%), efficient organisation of work (41%).

These findings are especially important as **24% of European HR & Learning Directors say that their organisation is currently facing a key skills gap**. This deficit of key skills can be explained mainly by difficulties in developing these skills (45%), but also by difficulties in recruiting people with these skills (44%) and by difficulties in retaining people with these skills (24%).

When it comes to skills development, employees appear to be more open to ATAWAD solutions ("anytime, anywhere, any device") than their HR & Learning Directors. They prefer face-to-face formats (training, coaching or peer learning), where they can interact with other learners and where classes are designed as times when employees are available to learn. Otherwise, their preference goes to solutions that enable employees to learn when they need to (using online resources, for example).



Mathilde Bourdat, L&D Management Expert at Cegos Group, gives further insights:

"Today international studies all forecast far-reaching changes in employment in the near future.

In the future, employment, whether salaried or not, will call for at once:

- in-depth expertise,
- a knowledge of technology that allows the employee to grasp the reasoning and the needs of other stakeholders in the system,
- cross-cutting skills such as general knowledge, interpersonal skills and context-specific skills.

To prepare people for this sweeping change, we think that the best answer lies in a set of three skills: cross-functional working, cooperation and empowerment. This skills set is the crux of the work organisation of new-world companies."

PROFESSIONAL TRAINING: PERCEPTION AND USAGE

53% of European employees would be willing to finance part of the cost of their training, and 79% would be willing to take training outside of their work time.

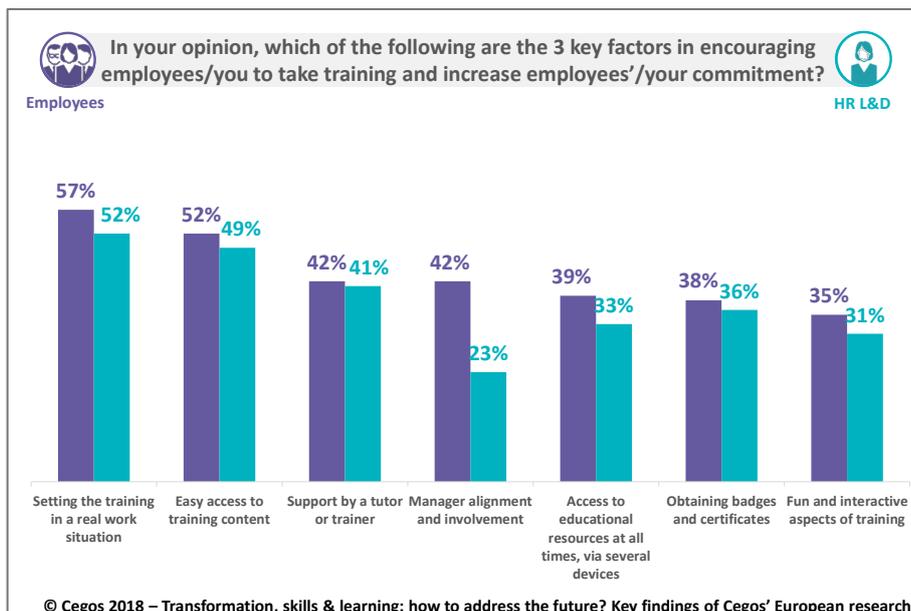
For 58% of HR & Learning Directors and 64% of employees, the company and the employee share responsibility for professional development. In a context that encourages greater employee empowerment as stakeholders in their own development, employees seem to have understood the importance of taking charge of their own development... providing employers can provide them with the right resources and suitable programmes.

To this end, 95% of European employees are ready to complete some training in order to adapt to the technological changes. Similarly, self-funded training and training outside working hours are ideas that are gaining traction among employees: 53% of European employees would be willing to finance part of the cost of their training (a 13-point increase on 2016), and 79% would be willing to take training outside of their work time (a 14-point increase on 2016). HR & Learning Directors' top three priorities for training are as follows:

- * #1 Provide employees with the means to learn at any time, according to their needs
- * #2 Strengthen the link between training policy and company strategy
- * #3 Be able to evaluate training courses' impact and ROI

On a more practical level, when polled about how their training should develop, HR & Learning Directors emphasise on-the-job transfer and tailored learning paths:

- * Workplace training and enforcement should be promoted (66%)
- * Training courses and learning paths should be more individualised (57%)
- * Devices should be more interactive and fun (42%)

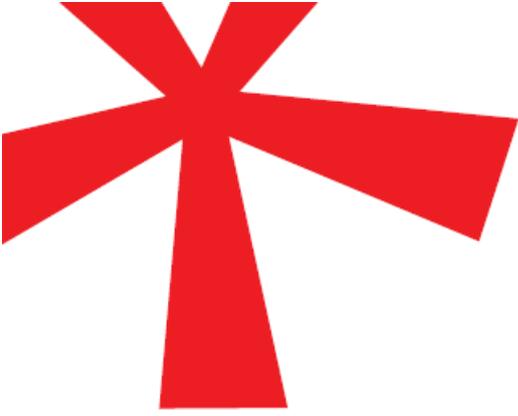


One of the major challenges facing HR & Learning Directors today is to engage learners. For employees and HR & Learning Directors alike, the three main drivers for learner engagement are to set the training in a real work situation, to make training content easy to access, and to provide support by a tutor or trainer. In other words, the more directly useful the training is, the easier it is to access and the more personal support the learner receives, the more likely the learner is to be engaged.

Christophe Perilhou, Learning & Solutions Director at Cegos Group, explains:

"If we compare HR & Learning Directors' training priorities with the rise of on-the-job training, we can see "time-to-performance" becoming an important learning issue. Companies are operating in an unpredictable, fast-changing environment that demands an ability to adapt quickly.

Against this backdrop, the most effective training courses manage to build performance for both employees and organisations: this is the reasoning behind our 4REAL approach, which promotes individualised learning paths over time, with content that is accessible anywhere and anytime, and is suitable for on-the-job transfer."



José Montes,
Cegos Group's Chairman:

"This latest edition of our research underscores the vital necessity for companies today to speed up skills development in order to tackle the current transformations in the world of work.

Technological developments are challenging employees' entire skills set, including technical, behavioural and business skills. A new framework is necessary to build up a smart and high-performing human & machine cohabitation.

At Cegos, we believe that, as machines progress, the human aspects of work and associated soft skills are becoming increasingly important. Likewise, human interactions are fundamentally important for thorough, deep-seated learning. Lastly, people must be able to train in a smooth, efficient manner, which implies finding the keys to learner engagement and make learning solutions even more effective."

ABOUT CEGOS GROUP

Created in 1926, Cegos Group is a worldwide leader in training and development. The Group now runs its own operations in 11 European, Asian and Latin American countries. It is also active in over 50 countries through its network of partners and distributors, which are all leading training providers and top-tier technology experts.

With 1,000 employees and more than 3,000 partner consultants, the Group trains 250,000 people around the globe every year and generates sales of €195 million.

Cegos deploys a global offering, including turnkey and tailored training and development, operational consultancy, Managed Training Services and international training projects. Its "blended learning" approach aims to provide the most suitable and competitive learner experience, by combining multiple learning formats (classroom training, e-learning modules, videoconferences, webcasts, e-training programmes and more).

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