Learning and Development trends in the Netherlands
Investigating multinationals

Deloitte.
This report provides the main findings from research on Learning and Development trends within multinationals in the Netherlands. Fourteen Dutch-based multinationals participated in a survey and interviews. Additionally, this report presents the results of the research, including a comparison to data from Bersin by Deloitte. Bersin by Deloitte is a leading research and advisory service firm in Enterprise Learning, Talent Management, Talent Acquisition and strategic HR Solutions. Bersin by Deloitte provides among other things an annual report about the state of the training industry in the United States (US) and the United Kingdom (UK).

The results from this research show that organizations vary a lot in which trends are practiced. All Learning and Development trends shared with the multinationals were recognized. These trends were defined based on a literature study and expert evaluation. This research has found three main motivations for introducing or developing the eight trends: 1) the need for a sustainable employable workforce 2) the changing environment and 3) the motivation to become more innovative, fast adapting and client oriented.

Key trends that organizations build on at the moment are strategic talent management and workplace learning. Attracting, keeping and monitoring the right talents and developing the workforce for competitive advantage. Organizations want and need an employable and multi-deployable workforce that is eager and passionate about improving their capabilities. Another key trend is that the workplace must become the learning environment. At this moment, workplace learning is recognized in organizations but it is not yet consistently supported by the L&D departments. Workplace learning in organizations is informally organized and employees are not always aware that it takes place. For the future it is important that Learning professionals investigate the conditions under which workplace learning is practiced well and create these conditions to increase the frequency and consciousness of workplace learning.

Organizations need to be fast adapting, innovative and need to develop client oriented products and services to create a competitive advantage. To achieve this, Learning and Development plays an important role. A learning culture where employees want to contribute to the organizations success by being continuous and self-directed learners is critical for success. The organization can support the employee by distributing the responsibility among employees, managers, leaders and the L&D department. The L&D department must arrange learning in an efficient, effective way and assure cost-awareness. Each and every one in the organization contributes to a learning culture that supports the organization’s needs. As a result, a change in organizations learning culture is required. Organizations must spread and expand their initiatives in this matter.

This research identifies that instructor-led training still dominates the Learning and Development function. Organizations dominantly assume that a training is the solution for all learning needs. But L&D professionals know that a different learning offering, like mobile learning, workplace learning, personalized learning, knowledge sharing and team learning have advantages compared to traditional formal training. Yet, changing the approach requires a transformation in organizations.

This research investigated comparable data to the Bersin by Deloitte research. Where this research focused on data from multinationals based in the Netherlands, the Bersin by Deloitte research focused on organizations within the UK and the US. The results of the participating organizations based in the Netherlands indicate similarities and differences to both UK and US organizations. One common result among all countries is the delivery method. On the other hand, in this sample there is less L&D staff per learner. Finally, there is higher spending in large Dutch-based organizations compared to the US and the UK, but midsize Dutch-based organizations spent less on Learning and Development.
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This report presents trends describing the current state of the Learning and Development (L&D) industry in multinationals who operate in the Netherlands. In addition, this report compares this industry to the international L&D industry, by comparing it to metrics presented in the Corporate Learning Factbook by Bersin by Deloitte[^1][^2][^3]. The following questions are addressed in this report:

- What are Learning and Development trends?
- How do L&D trends differ across organizations?
- How does the Dutch L&D market differ from the US and the UK L&D market?

### Purpose of this report

The purpose of this report is to give organizations the opportunity to benchmark their L&D department against other L&D departments who operate multi-nationally and to US and UK industry. Comparing metrics with industry norms can help L&D leaders to define and decide focus areas and make better investments. Moreover, understanding today’s Learning and Development trends will help organizations to proactively anticipate future changes and it creates the opportunity to constructively shape these developments.

### A Special Thank you

I would like to thank everyone who participated in this research study! Without the diligent efforts of Learning and Development professionals, writing this report would not have been possible. Also, I would like to thank the delegated professionals from Deloitte, especially Karel Massop who initiated this research. Also, I would like to thank Prof. Dr. Joseph Kessels who supported the process and warranted the academic quality in the background.

### Background: the eight trends

In order to being able to identify the current state of the L&D function, this research study investigated which of the following eight trends could be identified in multinationals. The eight trends come from a literature study and were confirmed, and customized to the Dutch context, by L&D experts from Deloitte:
1. Learning focusses on increasing business results
   Learning and Development staff put greater emphasis on effective and cost-efficient learning that positively impacts business results. For example, the strategic use of resources (knowledge, human resources, technologies), alignment with business goals, direction of increasing innovation and work capability. For these matters, organizations measure the impact of learning on business results, analyze expenses, restructure and integrate learning in the whole organization ((de-)centralization of learning) and establish learning management systems, global databases, global curricula and corporate universities.

2. Strategic talent management becomes essential
   The strategic development, attraction, incorporation and retention of an “expertise elite” is getting more attention. Organizations invest in human capital that can increase organizational performance. Performance support and succession management, on-boarding systems and staff databases, networks or stretching assignments are representative for this trend.

3. Personalized learning: focus on the individual learner
   More learning contents and materials are customized for the learner. Learning contents meet the individual’s goals, passion and talent. Learning material and level are linked to the learner’s preferences, present knowledge, abilities and skills. Learning materials are directed to those who need or want them through the use of technology.

4. Learners become more self-directed
   Learners become more responsible for their Learning and Development. Learners determine their own career paths and choose their own learning contents and methods. Employees are held responsible for their employability, mobility and transferability by developing expertise and becoming a “lifelong learner”. Organizations implement employee self-service environments to facilitate and support self-directed learning or stimulate and facilitate informal learning.

5. Mobile learning becomes popular
   Adjusted to the present needs for flexibility and mobility, the contemporary learner learns anyplace and any time with smartphones, tablets and laptops. Next to classrooms or the work environment, mobile learning is becoming accepted. Time and location are not fixed in this way for learning. Mostly formal or non-formal learning modes are available: online-learning, e-learning, blended learning, massive open online courses (MOOC’s).

6. The workplace becomes the learning environment
   More often organizations facilitate learning at the workplace. Learning is part of the daily work and integrated in work processes by the use of informal learning tools and technologies. Learning on the job, practice based and experiential learning have proven to be powerful strategies.

7. More knowledge sharing and team learning
   Digital and personal forms of knowledge sharing are increasingly applied. Professionals in the same field meet in order to share knowledge, learn from each other by discussing and evaluating practices. Environments for such practices are blogs, social media and forums or in general the World Wide Web, but also lunch and shares, knowledge sessions, conferences, etc.

8. Increased need for content curation
   Instead of generating and delivering instruction material and content, HRD structures, organizes, regulates, facilitates and enables learning. They organize and structure available content and technologies, then connect the learner and the learning content. Systems that support the HRD professional in these tasks are for example Knowledge Management Systems (KMS), Learning Content Management Systems (LCMS), and Course Management Systems (CMS).
On behalf of Deloitte, data for this study was collected from January to April 2015. This study involved 14 multinationals from 10 different industries (figure 1). The organizations involved are large (10,000+) and medium sized (1,000 – 9,999). Only multinationals that operate in the Netherlands and at least one other country outside the Netherlands have been invited to participate.

Figure 1: Respondent count by industry.

Organizations were invited by email to participate in the research. Existing Deloitte client relationships were the starting point. The detailed information presented in this report is based on (mostly) qualitative data collected via surveys and interviews supplemented with a literature study. Seven organizations returned the survey, nine organizations participated in interviews. Two of the respondents participated in both, the survey and the interview.
In the survey and the interviews organizations were asked to rate the eight L&D trends in three different ways. Firstly, organizations were asked to indicate the degree to which they recognize a trend in their organization, this rating will also be referred to as “recognition” in this report. Secondly, organizations were asked to indicate the degree to which they find the L&D trends important. This measure is called “importance”. Finally, organizations were asked to indicate the top five trends they invest most in (time and money). This measure is called “investment”. Via collection of qualitative data organizations were asked to explain their current L&D practices, elaborate their best practices, goals and challenges.

In this report quotations are presented from participants of this research. The quotes can be recognized by the following marks “”.

For the qualitative analysis, the program atlas.ti was used to encode texts and audio fragments. For the quantitative data analysis the program SPSS has been used, mainly for the descriptive analyses.
The organizations involved in this research recognize all eight trends to a higher or lower degree (Figure 2). Organizations vary a lot in the degree to which they recognize a trend. Also, different practices among L&D departments have been identified, which are moderately different from the eight trends. Due to these great differences it is concluded there is no common and clear focus among organizations with regard to the eight trends.

Figure 2: Distribution of recognized trends.

Great variety in which trends are practiced.
Despite this missing common and clear focus among organizations with regard to the L&D trends, most organizations do have a well-defined goal for the near future. Also, organizations know why this is an important goal for their organization. The measures of “recognition” and “importance” therefore show a high positive relationship to each other. This indicates that organizations do practice those trends that are important to them. Also, during interviews participants indicated that within the human and financial resources they receive they try to make the most of it.

“It is important to my organizations. Therefore, I recognize this trend for 75%. But it is not found important enough because then, I could rate 100%.”

The paragraphs below describe similarities found among organizations with respect to developments in the field, practices, advantages and disadvantages of trends, challenges and best practices.
Key trends
The measures of “recognition”, “importance” and “investment” show high values for the trends ‘strategic talent management becomes essential’ and ‘the workplace becomes the learning environment’ (figure 3). Therefore, these two trends have been identified as key.

Strategic talent management becomes essential
Research shows that organizations who are using the most valuable core employees have a higher organizational capability and performance. The goal of strategic talent management is to make use of talents to create a higher performing workforce.

“The right people, at the right time, at the right place.”

Figure 3: Averages of investments, recognition and importance.
Organizations monitor their talents, which helps them to utilize the right employee for the right projects, assignments or vacancies. Some L&D departments also take advantage of employees’ strengths and embrace and support their personal competencies and interests. As a consequence employees broaden or specialize their field of expertise and improve their learning capability.

“We are stimulating our professionals to think of what they want to learn and to what extent they can integrate this in their daily work.”

“Learning to stay fit for position: Because of the rapid changes, we want our employees to be aware of their talent, their power, their ambitions, so they adapt to changing circumstances, years before changing becomes crucial.”

Even if their current job is no longer available, employees are capable of learning and are required to grow into a new position, they are “employable”. Organizations also would like and stimulate employees to move in the organization, vertically and horizontally.

In the sample of this research, not all organizations have an overview of the capabilities and interests of their employees. It is important that L&D departments are aware of the next move of employees because then L&D departments can prepare employees for their next steps.

Hiring outside the organization has two negative effects: 1) Recruitment and induction of new hires is expensive and time-consuming. 2) Jobs are at risk because employees are replaced when their knowledge and skills are out-of-date. This creates a culture of distrust, which negatively influences employee engagement⁴. A recent study noted that nearly two-thirds of executives in multinational corporations said that talent shortages are likely to affect their bottom lines in the next five years². Bersin by Deloitte² determined that US companies demonstrate their commitment to developing talent due to a scarcity of skilled talent in the labor market. Organizations must commit to developing their internal talent to build the right skills for competitive advantage².

Workplace learning is recognized in organizations

It is noticeable that organizations recognize the trend ‘the workplace must become the learning environment’ highly, but in many cases the L&D department does not influence workplace learning. A shared view of most L&D departments is that workplace learning is informal and therefore not formalized (or felt as L&D responsibility).

“We are focusing on sharing knowledge and work spot-based training. We want to structure our informal learning processes.”

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Employee satisfaction research shows that learners are not conscious about the fact they are learning at the workplace or what they learned. When employees are asked about the development opportunities in their organizations, often they answer that they do not attend many training sessions.

Workplace learning can happen automatically in organizations by conversing, for example about subject matters or mistakes someone made. Learning professionals should investigate the conditions under which workplace learning is practiced well and create/stimulate these conditions to increase the frequency and consciousness of workplace learning. Creating awareness and understanding for all employees in the organization regarding workplace learning is key for its future success.

Figure 4: Discrepancy between recognition and importance.

Workplace learning is informal and unconscious.
A learning culture change
Looking at figure 4, the trends ‘Learners become more self-directed’ and ‘Learning focusses on increasing business results’ differ mostly in the degree to which they are recognized and found important. Developing these trends is crucial to adapting the learning culture change that organizations need for competitive advantage.

Need for self-directed learners: Learners become more self-directed
It is noticeable that organizations are in a transformation. Self-directed learning is important to many organizations, but at the same time they do not recognize it, nor do they invest in it. It is striking that despite the great importance of self-directed learning, organizations invest least in it compared to the other trends. Organizations want to be able to continuously improve and transform themselves to adjust to customer needs and learning is key to achieve this.

“Organizations develop and transform themselves and learning is a part in this, being open to new things, continuous improvement and learning must become a habit.”

“Employees need a learning capability. This means that employees are capable of developing themselves and others, which allows them to cope with big changes and to innovate.”

The fast and continuously changing environment requests the workforce to adapt fast and gain a learning capability, which allows employees to be able to change roles based on the recent needs of the organization by educating themselves. Examples from the interviews for changing roles in organizations are that employees need to transform their behavior: from product-orientation to client- and solution-orientation, from a control-function to an advisor-function, from an operator to a controller.

“People are waiting to be taken care of. To make the most of it, people must stand up, communicate their talent and take action themselves.”

During the interviews it also became clear that employees who are not able to adapt to the changing circumstances and are not arranging their own learning, risk their employability and might no longer be needed in the organization because there is no longer a position that fits their capabilities.

“Because of constant reorganizations, employees realize that they should have developed.”

The need for people to stay up-to-date can be shaped by employees identifying and addressing their own learning needs. Andrea Ellinger provides a 13 step plan that represented key decision making points, which employees can use to adapt self-planned learning. In order to use learning optimally to improve the business, employees must become eager to learn more about their specialization or to broaden their field of expertise.

Besides, exercising self-direction inevitably requires certain conditions to be in place regarding access to resources, conditions that are essentially political in nature (e.g. budget). In order to facilitate and motivate self-directed learning, leaders and managers have to support and guide Learning and Development needs and they have to step up as coaches, mentors, learning facilitators and providing multi-source feedback.
Increased need for content curation

Content curation is the trend with the least discrepancies between “recognition” and “importance”. Also, it is the trend that gains least attention from organizations in terms of “investment”. This is striking because organizations want their employees to become self-directed learners. If it is not clear what learning contents, methods and tools are available and where they can be found, how can an employee be self-directed? In conclusion, content curation must be seen as a precondition for self-directed learning.

“We want to increase content curation. There is so much learning material, but how can we manage this and can we manage it in a way that we can make it available for the organizations that employees can increase their self-directedness.”

Content curation is a prerequisite for self-directed learning.

Finally, the main task for L&D within organizations is still to produce learning contents and facilitate workshops and training. However, a lot of content is already available both in- and outside organizations. Organizations need sustainable, accessible and value adding learning solutions. With an increasing, more diverse and specialized learning offering, due to the rapid changes in the market, the facilitation of learning is transferred to the business. As the subject matter expertise often sits within the business, the role of L&D then becomes to organize, manage, regulate and enable learning in the business and in that sense support the performance of the organization.

Learning focuses on increasing business results

Organizations want to improve their competitive advantage by optimizing all internal processes, so that the best solutions can be offered to a client for a reasonable price. L&D is one of these internal processes and therefore needs to be optimized to become more relevant, efficient and effective.

“We need employees fit for their job. Only then they can contribute to the business results.”

At this moment there is a great discrepancy between the degree to which organizations recognize this trend and the degree to which organizations find it important (figure 4). Organizations increasingly have strategic projects and align their learning offering with the business strategy and the business goals. Because it is hard to measure an actual return on the business results, organizations evaluate whether a learning intervention has influenced job performance, the so-called return on expectation (ROE). Bersin by Deloitte has defined KPI’s (Key Performance Indicators) to measure the impact of learning on business results and could be the point of departure for organizations.

“I am not at all sure that we will go overboard on all kinds of measurements of results or return - which is notoriously hard to do well. We will, however, be more explicit in our designs in connecting with our pillar on developing the strength of talent.”

Also, organizations keep an eye on budget and work productivity of employees. Organizations become more and more aware of the factors which can decrease the costs and increase the value for the learner and the business. LEAN management can be found for example in questions like where can learning best be arranged, centralized or decentralized, or what learning offering delivers the best learning outcomes for the learning need.

“We must increase the learning outcomes with less resources. More with less.”

Awareness of effectiveness and efficiency partly consists of the administration of data and statistics to manage L&D. Some organizations are more advanced than others. As a response to the invitation to complete the survey, organizations informed us that retrieving information about L&D budgets, training hours of employees or percentages of used delivery methods is not possible, that it is much effort to uncover or that this is data they prefer not to share. The seven organizations that did fill out the survey were not able to complete all questions which support these conclusions. Some organizations pointed out that at the moment they are putting their administration in order.

Some organizations are more advanced than others in managing their administration.
However, learning must serve the business optimally. Learning is a mean to generate, improve and innovate business outcome. “L&D staff can [and have to] become closer partners with the business and better understand their issues.” As a result the HRD function in organizations change from not only assessing learning needs, writing up development plans, and conducting and evaluating training but also integrating L&D with business strategies, with performance appraisals, with recruitment/selection and with talent management.

The role of management and leaders
Learning organizations assign great responsibility for learning to managers and leaders. But managers and leaders have the responsibility to achieve short-term goals. Learning is a focus on impactful work, development and strategic skill gaps. It is possible there is no direct impact on the business results of this year, but it is fundamental for the quality of management and employees which will influence the business results in the future. Therefore, the involvement of managers and leaders in the learning process is a challenge for organizations where time and resources are tailored to the minimum, mostly needed for the primary process. To formally make leaders and management responsible for Learning and Development of employees, it must become a performance target for leadership and needs to be integrated in the performance review.

None of the organizations that participated in this research explicitly stated that they are pleased with all their managers and leaders fulfilling the task of mentoring employees learning process. In the participating organizations some managers and leaders are doing a good job, and others even hinder self-directed learners by denying development opportunities that e.g., take place during office hours. Managers and leaders who fulfil this task are for example acting as a role model in their own learning behavior, leaders facilitate learning for their employees. Managers and leaders are officially made responsible for a development task and make time for succession planning and talent development or they ask the L&D department to assist with change trajectories.

“[We believe that] we improve our leadership skills by letting our leaders facilitate. This is done in formal programs but also in learn & share sessions.”

Managers and leaders must allow employees to take time for learning. Moreover, they must support and encourage learning behavior. L&D professionals want to integrate learning in the DNA of the organization and that it is encouraged instead of overshadowed by day-to-day business. Bersin by Deloitte has demonstrated that many learning culture success factors are owned by leadership and management and can only be supported by the L&D department. Therefore, employee development must be seen as a shared responsibility between managers, leaders and the L&D department.

Learning must increase job performance and must be as efficient and effective as possible.

Employee development is shared responsibility of the employee, managers, leaders and the L&D department.
**Growing need for different learning offering**

In organizations there is a common belief that instructor-led training is the number one solution for all learning needs. This traditional learning method is manifested in the way people think. When there is a performance issue, people are sent to a training.

> “I have to improve my administration skills, so I attend a training: like a training is the solution for all learning needs. In many cases it is about attitude, in the relation with your supervisor, the motivation and unknowingness.”

Even though L&D departments facilitate more and more other methods, the most recognized delivery method in almost all organizations still is instructor-led training (figure 5).

> “At an early stage we make the decision to develop a training, while there is such a big reservoir of alternatives we can choose from.”

The growing need for different learning offering is based on the changing environment.

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**Figure 5: Percentage of used instruction methods.**

- Instructor-led training: 50%
- Online self-study: 40%
- Collaboration/Feedback: 30%
- Other methods: 20%
of organizations and in this new environment the formal learning methods have disadvantages. Formal training is for example instructor-led training and partly mobile learnings. They are (1) expensive in acquisition, either the purchase or the production costs, (2) time-consuming to implement, which means that a lot of time is elapsing between identifying a learning need and the intervention.

“By means of a formal training we can serve today’s learning need in 3 months, but we must serve today’s learning needs today.”

Also, formal learning (3) has a low durability because knowledge, laws and methods change continuously and (4) is only profitable if a large number of people have to learn the same content, it is for a broad audience. Formal learning is customizable to a certain degree, which means that mobile learning is supplemented with elements like coaching or if learners can choose elements that fit to their personal learning need.

In order to earn a diploma or certification, however, employees need to attend formal training. In this formal training, people will be educated to obtain a certain level and accomplish a set of learning goals. Formal training is predominantly instructor-led, also in certain e-learning or MOOCs (massive open online courses) a certification can be received. Learning professionals are confident that this can also or even better be accomplished by other learning methods. But legislation prescribes not only the learning goals, but also the learning method.

“Non-formal learning can serve today’s requirements, but Instructor-led training is still the most used delivery method.”

Alternative methods to instructor-led training have advantages. Methods which can replace or supplement instructor-led training include (1) mobile learning, (2) workplace learning, (3) knowledge sharing and team learning and (4) personalized learning.

“Formal learning is expensive, slow, impermanent and not customized.”

“By means of a formal training we can serve today’s learning need in 3 months, but we must serve today’s learning needs today.”

“Non-formal learning can serve today’s requirements, but Instructor-led training is still the most used delivery method.”

“There is a growing demand for certification, but the approach is still too much ‘old school’ training. There is a growing understanding that it is possible to change the way of training when focusing on the end result: the certification.”

“We have to test our employees for stuff that is not relevant for practice because otherwise our employees do not have the qualification to do their jobs.”

Nevertheless, the need for changing the approach arises as a result of limited financial and human resources available to organizations. A few organizations already indicated that instructor-led methods are not dominantly used, but that the method is adjusted to the learning need and the desired learning outcome.

“We are designing new learning paths with all possible learning interventions in the right place and right time fitting the learning path.”
Mobile learning becomes popular

Advantage of mobile learning in comparison to instructor-led training refer to employees who do not have to be at a certain location, at a certain time. This saves withdrawal and travel costs. In addition, mobile learning decreases the time elapsing between learning need and intervention.

Online self-study is the second most used delivery method (figure 5). Mobile learning is often blended with instructor-led training. Organizations use mobile learning for example for online self-study as preparation for a class. In organizations where not every employee has access to a laptop, tablet or smartphone from the organization, mobile learning can only be used for employees who have access. Organizations differ a lot in for how long online and e-learning is in use. Some organizations are now exploring the opportunities, others have introduced it more than a decade ago. However, organizations value mobile learning most in combination with other learning methods.

"In all our learning journeys we are looking for the right blend. We are trying to get as much skills in the classroom. Everything else could be done digital. We are aware of the trend, but real life is still lots of classroom."

"For employees working in stores and call centers is online learning in combination with limited class-room learning is more efficient. Increasingly advanced e-learnings and other online and mobile opportunities are applied."

The workplace becomes the learning environment

The advantages of workplace learning in comparison to instructor-led training are for example that it is inexpensive, and not time-consuming. As the workplace is the learning environment, there are no travel costs or travel time. Also, the time elapsing between the learning need and the intervention is shorter. The methods that can be used for workplace learning are permanent, highly efficient and up-to-date as employees fill in the content themselves based on their activities and projects.

"Cost and time efficient learning by more learning on the job."

"I find learning on the job very logical, regardless of the fact that it is the perfect context it is also cheap."

L&D staff explains during this research study that they facilitate workplace learning by creating tools. These tools are based on concepts and ideas like team evaluation, learning from mistakes, learning from observation, feedback, making use of the employee’s network to fulfill learning needs or team reflection, e.g. ‘did we achieve what we wanted to achieve’. Also, L&D departments integrate cases from the workplace in training. In conclusion, workplace learning is in some cases transformed into non-formal learning activities. Therefore, continuous learning by means of informal learning methods are the future and need to be embraced.

"We design interventions according to the principle 70/20/10. We start with using the workplace, then the 20% coaching and for what is left, we arrange formal training."

The allocation and structuring of work can be crucial to progress in workplace learning: more progress has been reported when the work was difficult or challenging, collaborative, and when there are opportunities for meeting, observing and working alongside those with more expertise.

More knowledge sharing and team learning

Collaboration/Feedback is the third most used delivery method. Organizations apply mostly personal forms of knowledge sharing and team learning. For example, lunch and shares, succession sharing knowledge sessions are organized, also communities of practice (CoP’s) are established and of course knowledge is also shared informally. In terms of activities there is an evident overlap with workplace learning e.g., in peer evaluation, dialogue and feedback. Research from Hsiu-Fen "shows that two individual factors (enjoyment in helping others and knowledge self-efficacy) and one of the organizational factors (top management support) significantly influence knowledge-sharing processes. The results also indicate that employee willingness to both donate and collect knowledge enable the firm to improve innovation capability". 
“It is about having a dialogue. You can learn from books alone, but it becomes interesting when you talk about what you learned with a colleague.”

However, some organizations already make use of digital forms of knowledge sharing or even team learning. A simple way to share knowledge is by making use of a Knowledge Management System or the intranet. Most organizations already implemented such an environment. Other examples for digital knowledge sharing are forums where solutions are generated, making short instruction videos for peers about a problem, having a talent finder to connect with colleagues that have a needed expertise or a feedback community for people with the same learning need.

“Knowledge management is very important. There is a lot of knowledge in our organization. We have insufficient structures for knowledge management.”

Digital methods of learning are an opportunity for multinationals, as it becomes possible to share knowledge and learn together across countries and time zones. In addition, communities and forums generate a platform for dynamic knowledge that can change permanently and when organized appropriately, is easy to find. A disadvantage of online knowledge sharing is that also outsiders or competitors have access. Organizations are very careful with sharing their knowledge with external parties because they expect that the competitive advantage might vanish. On the other hand, getting feedback from the external environment can incentivize innovation and increase motivation and learning.

Personalized learning: focus on the individual learner
In non-formal learning methods, a more personalized approach is possible. Learners are not running through a curriculum where most of the content is already known. But learners needs and abilities can be matched. Another opportunity is the just in time information, for example in performance support. The combination of workplace learning and just-in-time learning makes learning more efficient because meaning is directly added to the learning content (application and practice happen hand in hand with learning).

“Just for me, just enough, just in time! This is important because change is not a one-time thing, but a continuous process. We need to change fast. Also, this principle increases efficiency.”

“Just in time learning and learning on the job, makes learning more efficient and meets the individual goals of the learner.”

Personalized learning in organizations is often interpreted as designing an intervention that fits to exactly that individual’s needs. Not many organizations find this effective. Sometimes personalized learning is associated with registering employees for taking a course to get their certification, for example when an expert has to earn the license to operate. A simple, but effective way, which organizations initiate is personal coaching. Also, self-directed learning or someone monitoring self-directed learning plans, paths and goals is very personal.

“This trend is key in our vision on learning & development, and we will innovate our offering to bring it more in line with this.”

“There is room for personal learning goals and interventions in our team programs. We also have online interventions where the learners only need to follow what they are not capable of based on a test in advance.”
To benchmark the L&D function against other countries, this research measured the same data as Bersin by Deloitte in their annual report on the current state of the training industry. Below the results are presented in comparison to data from Bersin by Deloitte research in the US in 2012 and 2013 and from the UK in 2012, these are the most recently published Bersin by Deloitte Corporate Learning Factbooks from 2013 and 2014.

**Target groups of the L&D departments**

The L&D department pays most attention to starters and top talents, managers and leaders. Organizations run induction programs, talent programs for the top 100 or 300, many management development programs and leadership programs. Everyone that does not belong to one of these target groups is often out of range for the L&D department. Especially clerical staff and unskilled labor gain little attention from the L&D department (figure 6). Also, Bersin by Deloitte finds that in US organizations leadership development claims 35% of the budget.

“We have a talent management program for the young generation. After three or four years it is less structured.”

L&D departments focus on developing top talents, leaders, managers and starters.

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Figure 6: Percentage of employees served by the L&D organization.

<table>
<thead>
<tr>
<th>Type of workforce</th>
<th>Percentage</th>
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</thead>
<tbody>
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<td>Managers</td>
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<tr>
<td>Skilled labour</td>
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L&D Budget

In comparison to budgets identified in US and UK based organizations (assuming equal data sets), large organizations in the Netherlands spend twice as much on Learning and Development (figure 7). For midsized organizations the opposite is identified. Midsized organizations in the Netherlands spend half as much as organizations in the US and the UK.

According to research conducted by Bersin by Deloitte\(^2\) L&D departments with a higher maturity level have higher spending per learner than L&D departments with a lower maturity level. Expecting that organizations providing the data are mature compared to organizations that were not able to provide data, these results for the Dutch context are not representative for the population.

Figure 7: Spending per learning in Euro by organization size, rounded off.
Training hours per learner

Only two organizations provided data to this question. The organizations indicate annual training hours per learner are 24 hours (large organization) and 120 hours (midsize organization). Comparing these to the Bersin by Deloitte results, 24 hours is insignificantly higher than in large organizations in the US and significantly higher than in the UK. 120 hours is about six times of what is found in midsize organizations in the US or the UK.

Figure 8: Annual training hours per learner by organization size.
Training staff per learner ratio

In large organizations a similar training staff to learner ratio compared to US organizations is recognized. In the UK, there is significantly more L&D staff per learner. Figure 9 shows that the mid-sized companies who participated in this research less L&D staff compared to US organizations and significantly less L&D staff than UK organizations.

Figure 9: L&D staff per 1,000 learners.
**Delivery methods**

The analysis revealed that Instructor-led training is the most used delivery method, followed by Online Self-Study and Collaboration/Feedback. Very few organizations indicate that their most used delivery method is not instructor led. They explain that their method is chosen in means of effectiveness of the learning method to the delivered contents.

Comparable results are found in the Bersin by Deloitte research\(^1,2,3\) for Instructor-led training, online self-study and collaboration/feedback. Virtual instructor-led delivery is the only delivery method that was not identified in the companies that were questioned in this research. Other delivery methods have in our sample insignificant higher percentage compared to the percentage for the UK and the US.

**Figure 10: Used delivery methods in per cent.**
Conclusion

All organizations recognize all eight Learning & Development trends which were shared during this research. The motivation for introducing or developing the eight trends are the same in most organizations: The need for a sustainable, employable workforce, the fast changing environment and the motivation to become more innovative, fast adapting and client oriented. **To sum up, organizations want to become a true learning organization.** Unfortunately, this is not always expressed in support for the L&D department.

In organizational change, learning plays an important role. Circumstances where learning becomes integrated in everyday business must be created. Learning increases organizational capabilities by making each and every one in the organization a part of performance improvement. Also, there is a growing need to integrate learning in the business and transfer responsibility to managers and leaders in order to make change possible.

In comparison the US and the UK the different measures do not indicate that the participating organizations are more similar to UK or US organizations. However, delivery methods are comparable in all countries. In the sample of this research, less L&D staff per learner and more spending in large organizations compared to the US and the UK, meanwhile midsize organizations spent less.
References


We offer our clients a broad range of services in the field of corporate learning and development: training strategy, organization design, development of curricula, the use of learning technology and development of training materials. The focus is the right balance between formal and informal learning, between individual and collaborative learning, and the use of appropriate forms of learning (classroom, e-learning, social learning, mobile learning, serious gaming). Deloitte has all development resources in house. We often collaborate with other Human Capital service lines because learning often goes hand in hand with change and organizational development. Deloitte is also a world leader when it comes to learning and development of its own employees.

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