

The Corporate Learning and Development Landscape in Egypt

2022



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Input from
30
key corporations

Incorporating
12
business sectors

Bridging the Gap

Changes in business strategies, and work dynamics, together with the ongoing changes in working modes and environments, have an impact on corporate training needs, priorities, and plans. AUC School of Business realizes its role as a leading executive education partner to aid training providers and organizations in setting their strategic priorities, identifying new opportunities for excellence, and maximizing benefits of client-provider relationships.

This study identifies critical perceptions and trends and provides insight into the shifts taking place in the corporate learning and development (L&D) landscape in Egypt. The study explores the dynamics of identifying company training requirements, service providers, contractual procedures, post-training evaluations, and, most importantly, emerging trends.

The research builds on the insightful input of 30 remarkable organizations from 12 industries, including banking, healthcare, ICT, agribusiness, food and beverage, real estate, insurance, transportation, manufacturing, utilities, automotive, and oil and gas.

Our research was led by a team of executive education experts from the AUC school of business, who conducted thorough personal structured interviews, and aggregated responses highlighted in this report. In addition, insights from relevant UNICON¹ reports are incorporated for comparison with global trends.

¹ UNICON is the global consortium for university based executive education. AUC School of Business is a long-standing member of UNICON.



Background

Taking Initiative

Problem

Although there have been numerous reports addressing trends in the global L&D arena, there is a lack of references for the corporate L&D landscape in Egypt. This makes the jobs of both client organizations and training providers prohibitively challenging. Decisions are becoming harder to make and fruitful cooperation opportunities can be missed on both ends.

Purpose

This report paints a picture of the current dynamics of the corporate L&D landscape in Egypt from the corporate viewpoint. It establishes a reference that both providers and corporates can use as an eye-opener on the local market dynamics at large.

As a pioneer in university-based executive education, AUC School of Business is setting the foundations for future studies in the market through this report.

Objectives

- Explore the L&D landscape in Egypt.
- Identify the relevant training needs in corporate Egypt.
- Examine the impact of various external factors on corporate L&D market dynamics.



Executive Summary

In the corporate L&D landscape in Egypt, the report identifies the **major market gaps** by firm type and size. In order to effectively supply training solutions, the need for establishing a partner-consultant relationship is the most essential with a weight of 87%.

A rising need for experiential learning and application-based programs has been identified with a weight of 81%. Additionally, the need for training solutions that offer a good combination of soft and hard skills is becoming more popular with the weight of 71%. The report clarifies the necessity of providing the training service with efficient assessment support on all fronts.

The report also explores how companies identify their requisite training. The corporate L&D function was reported as the leading trigger eliciting **training needs** with a weight of 51%, followed by **functional departments and market-driven triggers** with weights of 22% and 16%, respectively, while **strategic vision and management-driven triggers** for training needs came last with a weight of 11%.

In addition, the report paints a clear picture of how corporations plan their training needs for the year, including training budgeting time and ranges per sector, training provider selection, and training formats.

Changes in work dynamics enforced by the Covid-19 pandemic were taken into consideration

Introduction

What is going on?

What is the situation at present in the corporate L&D landscape in Egypt?

With the lack of a comprehensive understanding of the needs and challenges corporates are continuously facing in the market; a gap will always present itself between corporates and training providers.

This report is an attempt by AUC School of Business – as a key player in the university-based executive education arena and a UNICON member – to bridge this gap by creating a baseline reference for the current L&D requirements of corporates in the local market.

Sample Profile

Split by size



Split by type

Local vs. multinational operating in Egypt



53%
Multinational

47%
Local

The sample² included a mix of well-established large and medium-sized corporates³ accounting for 83% and 17% of the total sample, respectively. The number of employees ranged from less than 1,000 to more than 3,000 and the annual average training budget ranged from less than 0.5 million EGP to more than 10 million EGP. The sample covered both local and multinational firms in the market with weights of 47% and 53% of the total sample, respectively.

The report explored corporate perceptions regarding L&D providers, recent trends, and the best practices they've used to determine their training needs and selecting providers. Finally, the report zooms in on the current preferences of corporates for training formats and the most applied post-training evaluation strategies.

2 Company size allocation as per the reported size during the interviews and linked to Central Bank of Egypt definition

3 The Central Bank of Egypt (CBE) considers enterprises with a business volume between EGP 1 million and 50 million to be small and those with a volume from EGP 50 million to 200 million to be medium-sized.

Section 01

Perceptions and Trends



01 Perceptions and Trends

1.1 Common market gaps across industries and different company sizes

Five core points were reported to be the most common gaps or unmet needs that client organizations have been recently witnessing within the L&D landscape in Egypt. The varying weights are directly proportional to how pressing a need is perceived.

Market gap

Incidence rate (%)



87%

of the interviewed sample aspire
for training providers to play
the role of the partner/consultant

Most of what is offered in the market are off-the-shelf solutions (pre-packaged programs), which do not precisely meet the business needs of corporations.

Off-the-shelf training solutions are ideal for technical skills that could be standardized and certified; yet such offerings are not ideal when the need for leadership training and mindset change arises, where more customer-centric/tailored solutions need to be developed based on specific client requirements.

However, the growing demand for customer-centric training solutions by client organizations presents its own set of challenges, particularly if provided by a reputable training provider. According to a UNICON research report titled *"What are the jobs to be done in the future of executive education"*⁴, two key challenges for this approach were highlighted:

First, *It comes at a premium cost.* The creation of a new customer-centric business model requires training entities to adopt a “solutions’ provider” mindset. This suggests a shift across various business model aspects, resulting in an elevated cost.

Therefore, corporates are placed in a situation where they have to choose between less reputable and reliable training providers achieving cost efficiency and reputable university-based providers offering off-the-shelf solutions.

Second, there is an issue with how client organizations perceive training providers. The “solutions’ provider” view is missing limiting the opportunity for a partnership relationship. This sheds light on how training providers need to position themselves in the minds of their client organizations.

Definitions:

Off-the-shelf training solution

Off-the-Shelf Training Solutions are ready-made training solutions that can be directly incorporated into your existing development program, to cover common topics or skills that are vital to most professionals amongst various industries.

Customer-centric training solution

Customer-Centric Training Solutions are training programs in which content is specifically designed to suit an organization’s unique need, applications, and culture.

⁴ Ryan, T. (2021). What are the jobs to be done in the future of executive education? UNICON research paper.

81%

*of the interviewed sample
expressed the rising need for
experiential learning*

There is a clearly articulated and common gap between concepts and knowledge provision on one side, and practical application on the other. An effective balance between theory and localized, relevant practical application is widely needed, especially with the general evolving trend for training solutions skewed towards skill-based training and development programs

as opposed to certifications (except for job-based technical certifications).

Also, many corporates find that the training solutions offered lack relevant local case studies, and when they do, they lack connection to the client's situational needs (This was most highlighted by the oil & gas, real estate, ICT, and agribusiness sectors).



Definitions:

Active learning

“Active learning” refers to a wide range of teaching and learning practices that require students to do an activity before, during, or after the session to help them better understand a concept.

Experiential learning

“Experiential learning” is not just about doing an activity or sharing an experience; it applies when students reflect on and conceptually understand that shared experience and then act upon that new understanding.

71%

**of the interviewed sample
expressed the need for
assessment support from
training providers**

This study has shown that there is a clear market gap in offering comprehensive views on pre- and post-program assessment by most training providers. Hence, corporates are unable to visualize and realistically evaluate the impact of the training on their staff.

a. Significance of pre-program assessments

- It identifies the starting point that enables corporations to clearly evaluate the status of their employees. It is also critical for training providers as it enables them to propose relevant recommendations on the program design, flow, topic variety, and level of complexity which are essential to achieve the training objectives.

b. Significance of post-program assessments

- Ideal pre-program assessments, as envisioned by providers, must consider both psychological factors and functional needs. This is in addition to the need for expert perspectives on anticipated changes in both the workspace and environment.
- Post-program assessments are an applicable quality assurance tool used by providers to determine whether or not the agreed-up on training objectives have been met.
- Training providers should ideally provide corporates with evaluation and recommendation reports. This successfully supports both organizational strategic objectives and individual employee development objectives.

c. Another relevant gap

- Assessments need to cater to and carefully consider a balance between organizational long and short-term goals on the one side and employee development goals on the other.
- A common pitfall is that the briefing and alignment process between clients and providers overlooks one of those requirements, causing proposed solutions to be skewed toward individual employee needs.



53%

of the interviewed sample expressed concerns over the inability to offer the optimum blend of soft and hard skills

Finding the optimal blend of soft and hard skills in training solutions is demanded by corporations to better navigate business challenges. However, both tracks are currently not optimally coupled.

Definitions:

Soft skills training

Soft skills are people skills and abilities that are not unique to any job but are used to have more positive interactions with those around us; like communication skills, leadership skills, time management, team-working, and problem-solving.

Hard skills training

Hard skills are job-specific duties and responsibilities. Hard skills can be learned through education, hands-on experience, or training. These skills are usually focused on specific tasks and processes that require technical education and/or practice.



48%

of the interviewed sample were apprehensive about the limited utilization of digital learning technologies

The reliance on digital technology has increased significantly over the past few years due to the COVID-19 pandemic.

Training providers haven't optimally utilized digital technologies in their offerings.

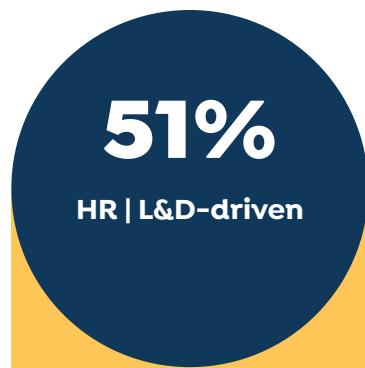
Section 02

The Dynamics of Identifying Company Training Needs



02 The Dynamics of Identifying Company Training Needs

2.1 The four triggers of training needs



Internal

The HR department -more specifically, the L&D function- evaluates and consolidates training needs through:

1. Discussions with different business units or functions.
2. Regular and frequent assessment rounds to articulate relevant gaps that trigger training needs at all organizational levels.
3. Pinpointing gaps exposed by the company performance evaluation system and competency frameworks.



Bottom-up

Each department in the organization requests specific topics catering to both departmental and employees' individual development goals.



External

Training needs are determined based on current market requirements and industry-specific dynamics (planned and ad-hoc).

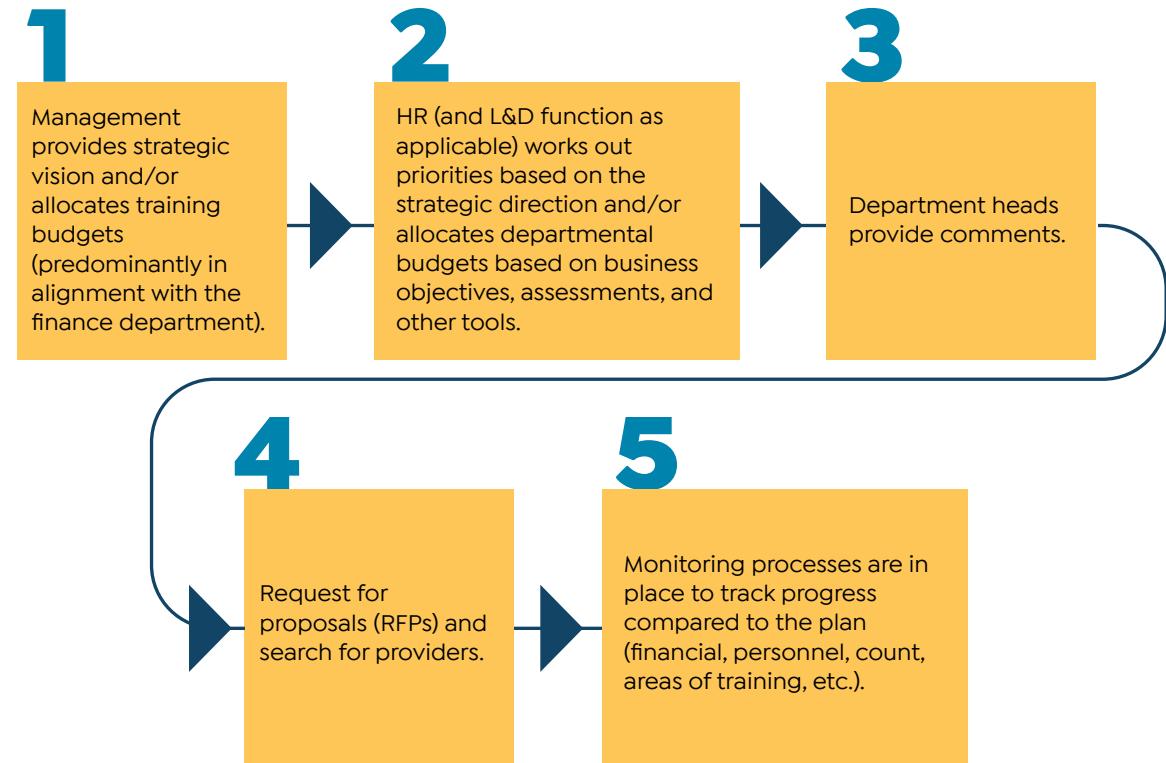


Top-down

The senior management demands topic- and skill-specific training programs to effectively fulfill the company's strategic goals.

2.2 Identification of the training needs

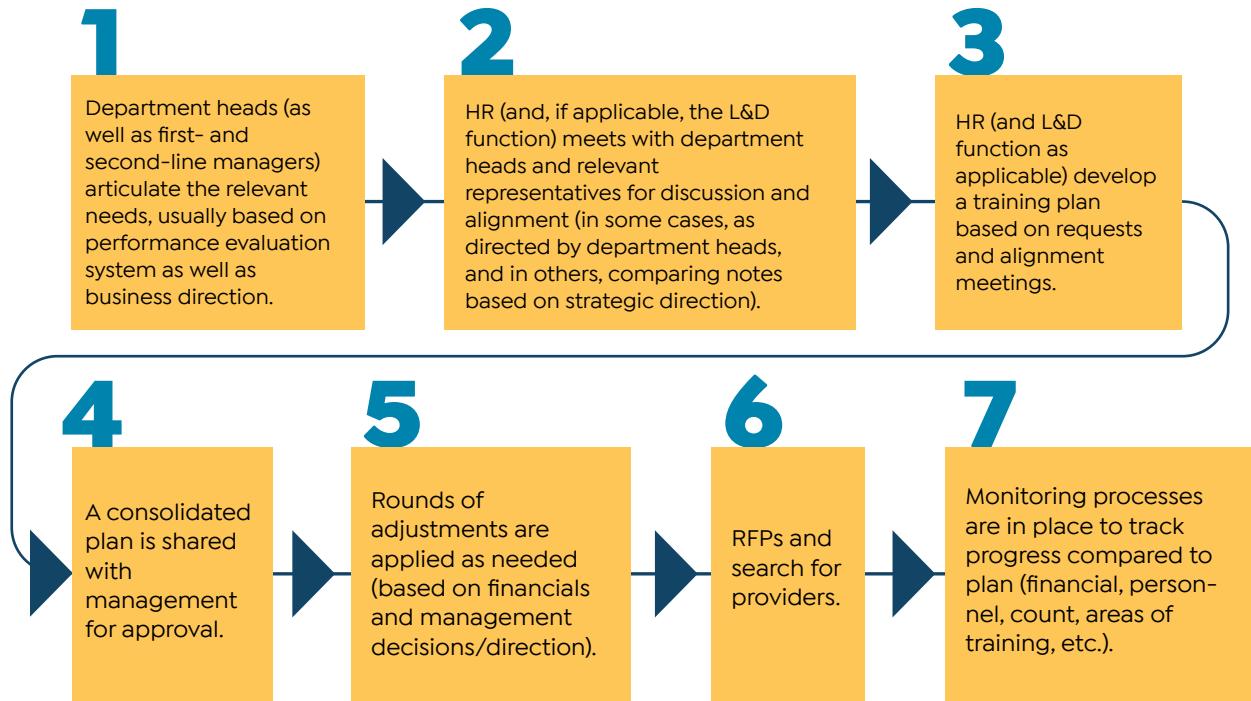
A. Management directs but does not participate in the details





2.2 Identification of the training needs process

B. Bottom up with management participation

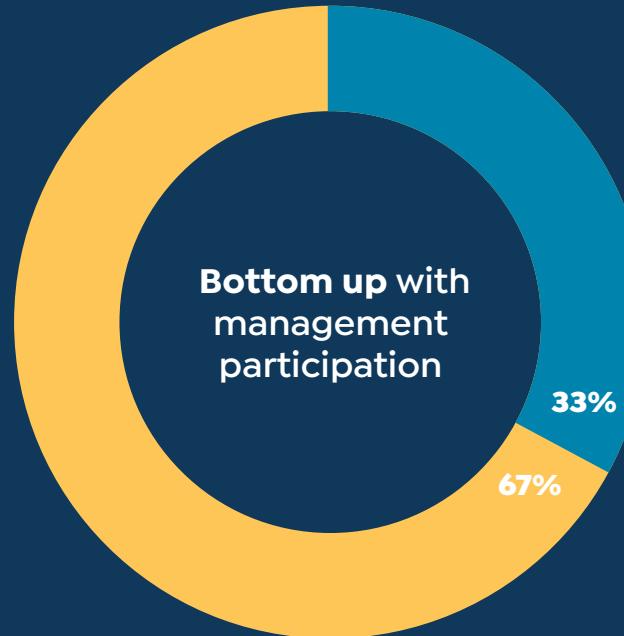


2.2 Identification of the training needs process



A. Management - directed

This is the prevailing process among large local and multinational corporations, with a collective weight of 76%, and less seen in SMEs, with a weight of 24% of interviewed SMEs.



B. Bottom up

This is the prevailing process amongst SMEs, with a weight of 67% of interviewed SMEs; less is seen in large-sized local and multinational corporations, with a collective weight of 33%.

large local and
multinational corporates
SMEs

2.2 Identification of the training needs process

A. Management - directed

Seen more in the following sectors:



Healthcare

Insurance

Oil and gas

Automotive

B. Bottom up

Seen more in the following sectors:



Pharmaceuticals

ICT

Construction
and building materials

F&B



Banking

Real estate

Transportation
and logistics

Agribusiness

Non-banking
financial institutions

Responsibility of determining needs:

More skewed towards the HR function
- including L&D - head of assessment, and
training managers (in alignment with
heads of functions).

Responsibility of determining needs:

More skewed towards heads of functions
(to be approved by HR).

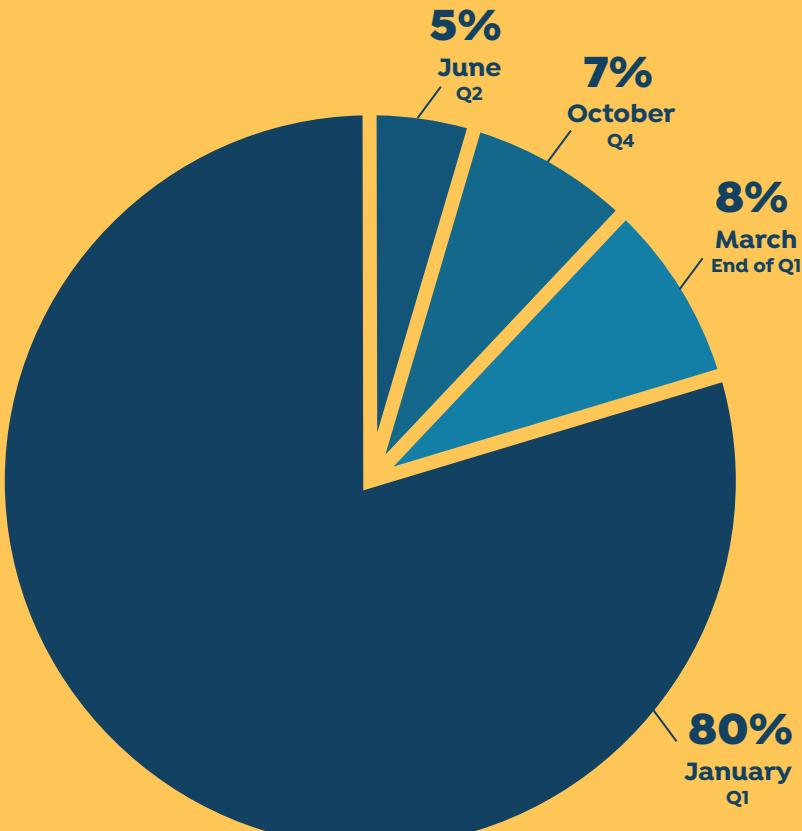


2.3 Variations in needs by level

Career level	Type of training needs	Program lengths	Complexity in evaluating needs and consequent plans
Junior	<ul style="list-style-type: none"> - More functional and technical skills. 		<ul style="list-style-type: none"> - More complex as there are many factors involved in the process (workforce size, aligning diverse types of needs, etc.).
Middle	<ul style="list-style-type: none"> - Functional and retention-oriented programs (certificates and progressive skills). <p>Affected by strategy and business priorities.</p>	<ul style="list-style-type: none"> - More frequent and shorter training programs (compared to senior levels). 	<ul style="list-style-type: none"> - Less complex (more specific, manageable number of participants for the program).
Senior	<ul style="list-style-type: none"> - Leadership skills – and more inclined towards international training programs and providers. 	<ul style="list-style-type: none"> - Less frequent, yet relatively longer programs. 	

2.4 Training budgets

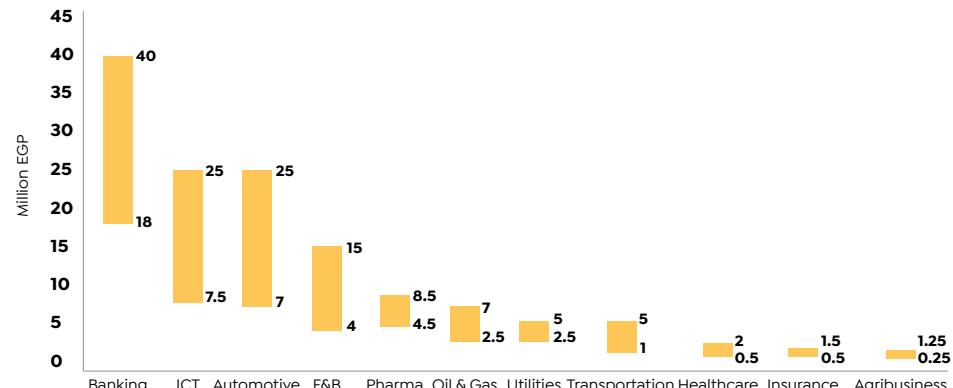
2.4.1 Timing of training budgets allocation



2.4.2 Training budget range

The banking, ICT, and automotive sectors maintain the biggest training budget allocations, followed by the F&B and Pharma. Most other sectors allocate between 1-3 M EGP, with agribusiness and transportation as the lowest spenders (comparatively) on training.

Annual training budget range/sector*



*The lowest reported point reflects the reported average budget by SMEs, while the higher endpoint of the range reflects the average reported budget by multinationals and large-sized locals

2.4 Training providers

2.4.3 Local vs. global training providers preferences



20% 80%

Multinationals

Global
Local



70% 30%

Larged-sized locals



93% 7%

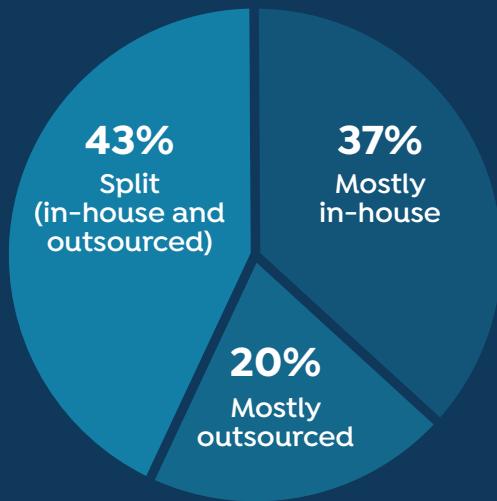
SMEs

2.4.4 In-house Vs. Outsourcing

In-house vs. outsourced training preferences

Among the interviewed sample:

- 43% reported splitting their training needs between in-house and outsourcing. This is the standard approach in sectors of a predominately technical nature that need a boost in functional training, namely the healthcare and pharmaceutical sectors.
- 20% prefer to resort to external training providers. However, that preference is highly skewed towards SMEs on both the local and multinational landscapes, given their overall size in terms of the number of employees, available training capabilities and therefore, the favored cost and time efficiency by choosing the outsourcing direction.
- 37% reported their preference for in-housing their training requirements. This approach is popular in the Egyptian corporate landscape, especially amongst multinationals and large-sized local corporates. It is considered cost-efficient given the larger number of employees together with having sole control on the training content offered as well as unlimited room for tailoring and customization.
- Multinational corporations are starting to rely more and more on their internal-learning platforms in off-the-shelf training.



Section 03

Sources of Information for Identifying Providers



03 Sources of Information for Identifying Providers

The sources below are ordered from the most preferred to the least, based on the number of mentions by the interviewed sample.

1. Networks and recommendations:

- Word of mouth for topic experts and overall reputable providers.
- Examples of networks mentioned are HR private groups, Egyptian Banking Institute, and the American Chamber of Commerce in Egypt.

2. Direct approach:

Through new proposals, brochures or training calendars distributed by providers at the start of the training cycle (both physical and electronic versions of brochures and catalogs work, but electronic versions have higher retention).

3. Previous experience with providers or current providers' list.

4. Websites (and digital ads):

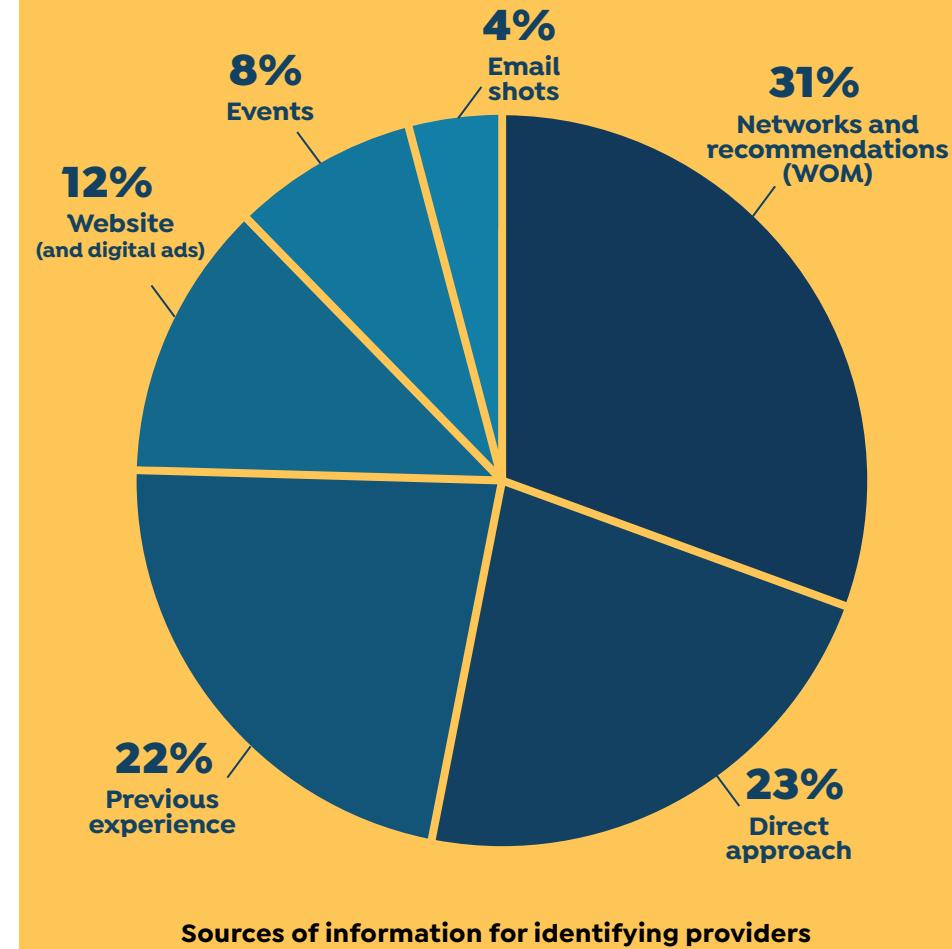
This is an employee-pull source, especially in the banking sector.

5. Events:

- More so in sectoral specializations like real estate.
- L&D events were also mentioned as relevant by most of the interviewed sample (the L&D Hub conference was the most mentioned event).
- Large ICT/auto companies stated that L&D events are not seen as important.
- The American Chamber of Commerce in Egypt committees and events were mentioned.

6. Email Shots:

not always positively perceived.



Section 04

Selection Criteria,
Decision-Making and Roles



04 Selection Criteria, Decision-Making and Roles

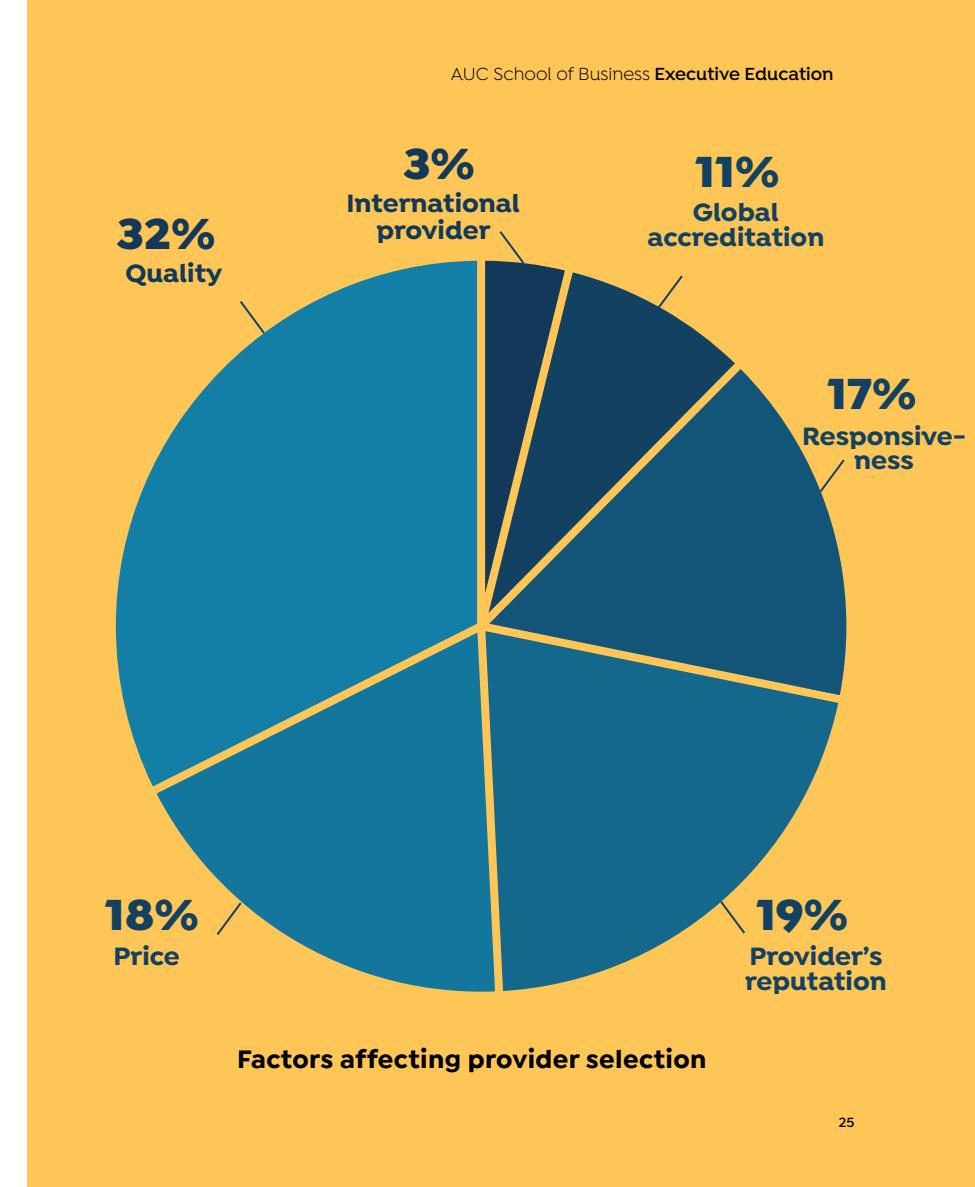
4.1 Factors affecting provider selection

Listed below are the factors affecting provider selection in order, from the most important to the least important, based on the number of mentions.

1. **Quality:** In most incidents, quality is used to refer to content and instructors. It should be noted that instructors are seen as key differentiators.
2. **Provider reputation:** is defined as the brand name, market reputation, and previous experience.
3. **Price:** for corporates, the price factor here is collectively synonymous for cost and payment terms.
4. **Responsiveness:** is measured by the time it takes to respond, as well as agility and flexibility.
5. **Accreditation:** this factor was most mentioned amongst healthcare, pharma, and F&B sectors.
6. **International institute:** of a low mention as a criterion (and rather limited to multinationals)

Our findings from the local corporate market in this study were, to a great extent, reflective of the voice of corporate clients globally. As reported in a UNICON study titled “Selecting the Best Executive Education Partner: Voice of The Customer,”⁵ the factors that client organizations mainly consider to identify, evaluate, and select a University-Based Executive Education partner were five: reputation, instructor, content, price, and location.

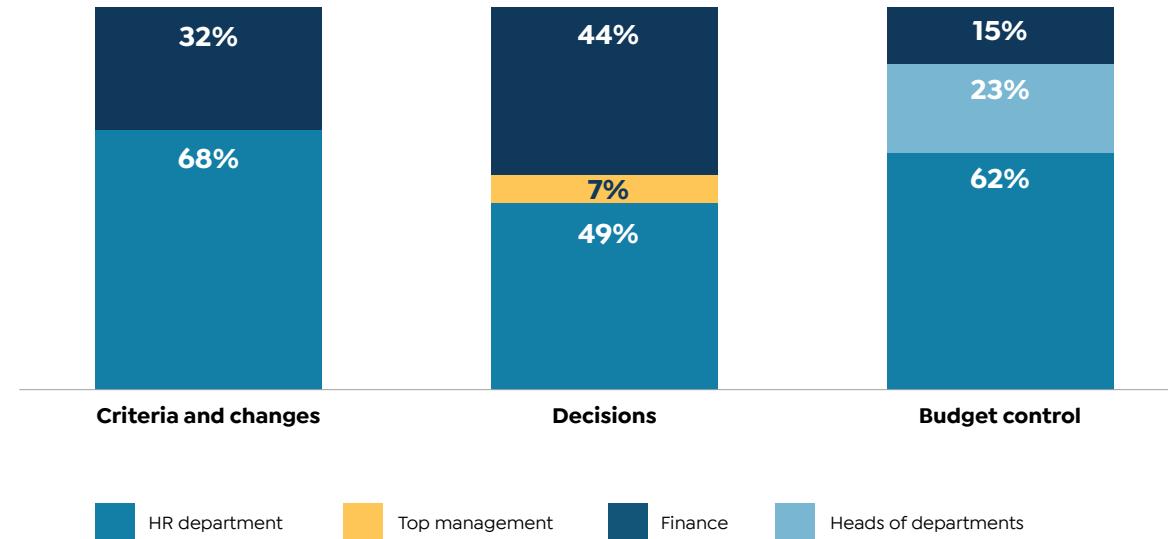
This solidifies our understanding that the local market’s main criteria in choosing a training provider are in sync with the current global direction.



⁵ Cataldo, P., & Bean, K. (2022). Selecting the Best Executive Education Partner: The Voice of the Customer. UNICON Research Paper

04 Selection Criteria, Decision-Making and Roles

4.2 Relevant involvement in the criteria and selection of providers



* HR Department includes L&D Heads, OD Managers, Talent Development Managers, Training Manager & CHRO/ HR Director 26

4.3 Selection process

Most corporates from the interviewed sample used two prevailing processes for selecting training providers.
The choice of the process depends on the specific situation on hand.

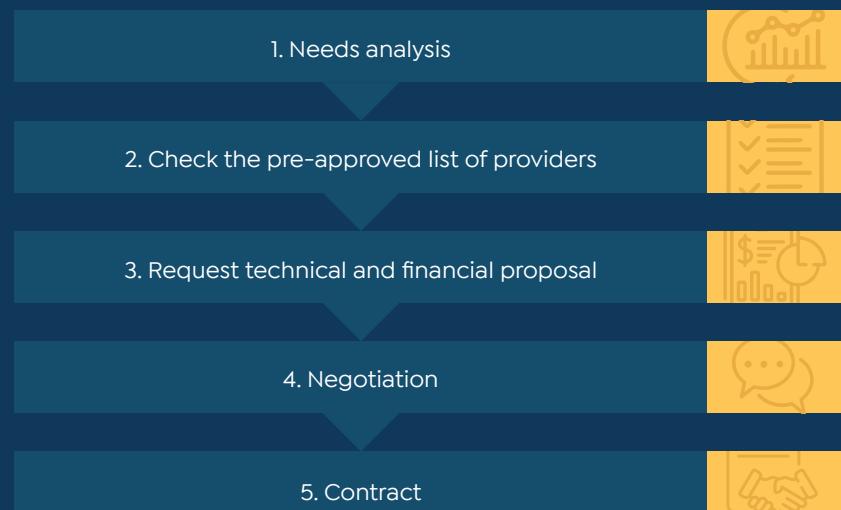
Process 01

RFP and selection committee | tender



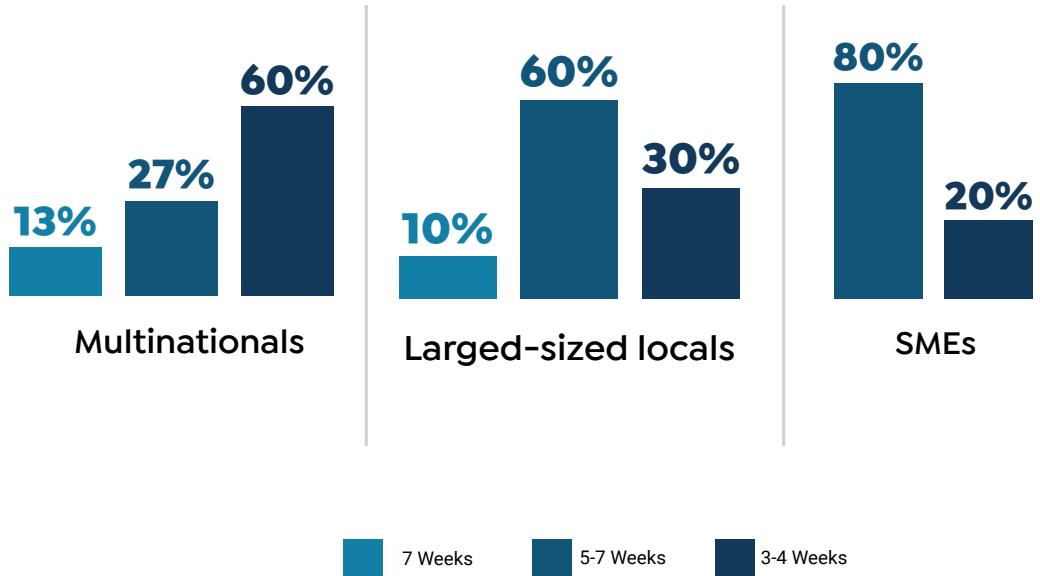
Process 02

Direct assignment to one or more providers from a pre-approved list



4.4 Preferred contracting process and payment terms:

a. Contracting process duration (no. of weeks)



b. Payment terms

Predominantly 50% of the interviewed sample complete the payment process upfront while 50% proceed with the payment on training completion and satisfactory delivery; with an applied payment period ranging between 30 and 90 days.



Section 05

Post-Program Evaluation

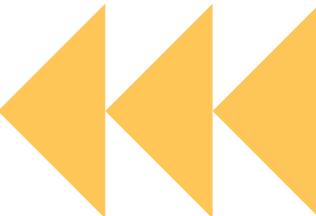


05 Post-Program Evaluation

5.1 Measuring success

Methods of evaluation mentioned by the interviewed sample are summarized in the following points:

- Comparing results of pre and post-program exams.
- Training provider reports, usually delivered 2 weeks after program evaluation.
- Employee progress feedback given by the direct manager or head of the department. This feedback could be in the form of a questionnaire and is provided 2-3 weeks after the program conclusion.



Measuring Success Post Program Delivery

Measuring the return on investment (ROI) of training is viewed as the most aspired tool for measuring training success, and corporates are hoping for its application soon, although it is currently not practiced in the local market.

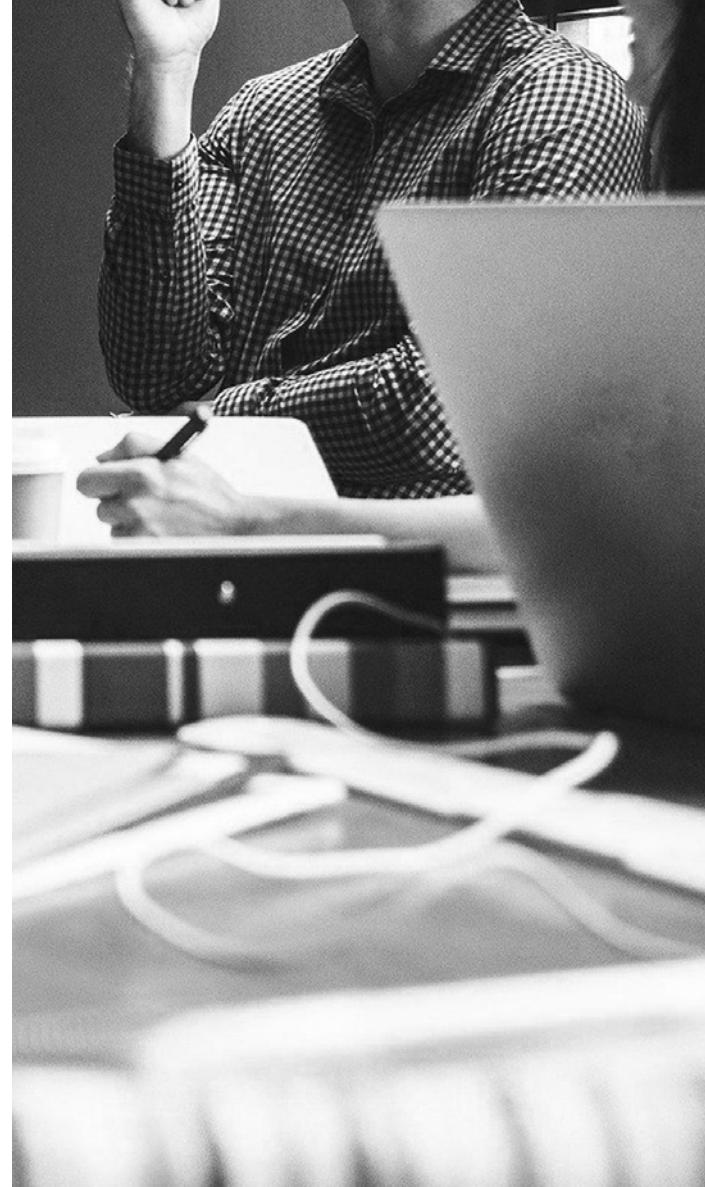
However, according to the research paper by UNICON titled "*ROI on Executive Education: Revisiting the Past and Looking to the Future*,"⁶ the payoff of executive education is supposedly long-term and subject to a range of externalities.

This makes measuring the effect of a development activity on the business performance over time extremely difficult.

It is important to note that this approach requires a collaborative effort between both training providers and corporates for the entire training experience to have a measurable impact.

Training providers should raise the issue of ROI at the design stage and set out to determine tangible measures through activities such as action-learning sets. ROI is not always measured in financial terms and is specific to the strategic priorities set by each client.

⁶ Cataldo, P., Stilliard, B., & Topping, P. (2018). *ROI on Executive Education Revisiting the Past and Looking to the Future*. UNICON Research Paper



Definitions:

Action learning⁸

Action learning is an educational process where the participants study their own actions and experiences with the objective of improving performance. This is done in conjunction with others in small groups called action learning sets. (Welskop, 2013)

Action learning sets

Action learning sets are groups of 4-7 people, who meet regularly to support one another in their learning to take purposeful action on work issues. Each set is managed by a professional set facilitator, who facilitates the meetings, encourages the set members to ask questions, and reflects on the actions to be taken. (teachingexpertise.com, n.d.)

⁸ Welskop, W. (2013). Action learning in education. In book: Evropské Pedagogické Fórum 2012, Pedagogical and psychological aspects of education, vol. II

5.2 Satisfaction levels with current providers, success factors and corrective actions

Generally, the L&D team is responsible for the assessment and evaluation of the training program. This is mainly dependent on positive feedback from the direct managers, the head of the department, program participants, and the L&D leads.

Satisfaction levels with current providers:



Local companies reported an overall satisfaction level of 3 out of 5.



Global companies reported an overall satisfaction level of 4.5 out of 5.

In case the programs delivered were not successful, the following are the different ways companies deal with the training provider:

a) Warning and request for action and/or compensation

- This is usually done when there are problems with the operations or when there is a long-term relationship with the provider.
- An example is to request a re-run.

b) Remove provider from pre-approved list

- This usually takes place in case of issues with delivery or objectives.

Section 06

Training Format Preferences

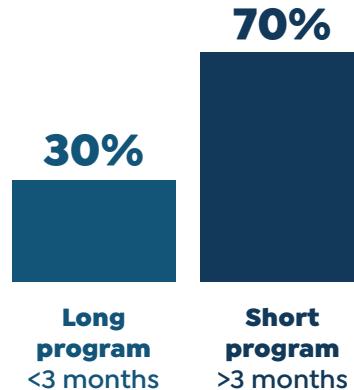


06 Training Format Preferences

6.1 Short vs. long

70% of the interviewed sample were in favor of short programs.

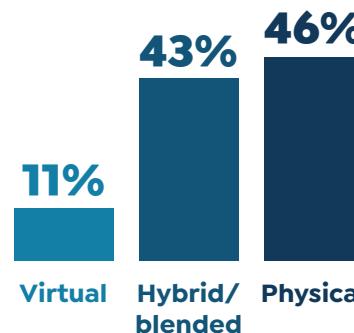
Short programs are defined as up to 3 months in duration.



6.2 Virtual vs. physical vs. hybrid/blended

In the wake of the high use of technology that COVID-19 circumstances imposed, corporates that prefer to rely on virtual and blended training formats accounted for 54% of the addressed sample. The findings show that physical or blended formats were the most preferred mainly because of the networking component of the training experience. The preference drivers for the virtual format stem from the fact that it is more flexible and less disruptive to work schedules. However, the virtual format is not favored for technical topics, as it limits the overall benefit and deflates the perceived ROI.

In conclusion, most of the interviewed sample agreed that the hybrid/blended format is expected to be the new normal; as it offers the ultimate formula which maximizes the benefit of technology without losing the needed benefit of the human connection between the trainer and participants, as well as that between participants and their peers.



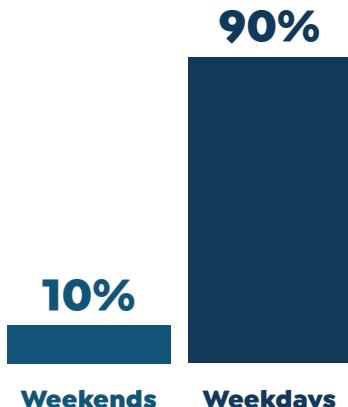
It was also reported by global client organizations in a UNICON research paper titled Selecting the Best Executive Education Partner,⁷ that corporates are generally seeking providers who can provide a variety of program delivery alternatives to traditional on-campus offerings like online, live online, hybrid, or blended programs over those who do not, those providers who can provide variety of program delivery options will eventually receive more consideration than those that cannot.

⁷ Cataldo, P., & Bean, K. (2022). Selecting the Best Executive Education Partner: The Voice of the Customer. UNICON Research Paper

6.3 Preferred timing: days and time

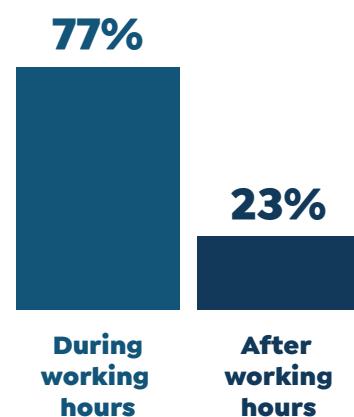
a. Weekend vs. weekdays

90% of the interviewed sample are in favor of weekdays, as some view weekend training as unethical and negatively affects work-life balance.



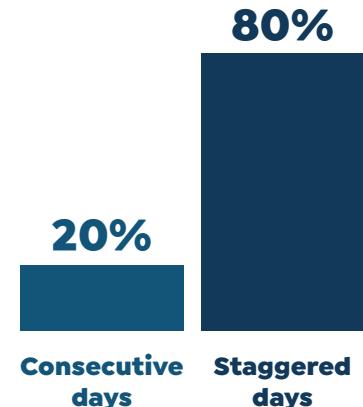
b. During working hours vs. after working hours

77% of the interviewed sample were in favor of during working hours Vs. 23% preferred after working hours, which some see as negatively affecting work-life balance.



6.4 Consecutive days vs. staggered

80% in favor of the staggered format vs. 20% for consecutive days, which is most accepted in case of short programs (2-3 days).





Conclusion

Executive education and corporate training have evolved and will continue to change post 2020 worldwide pandemic. To put all parties on the same page when monitoring changes in the market, we need to provide a picture of where we stand right now, how the corporate learning and development function is performing and what its needs are.

This is the first in a series of reports on the training market in Egypt that aims to provide an up-to-date view of how corporations in Egypt select, evaluate, and determine what they need from a provider.

Several factors contribute to shaping the needs of corporate clients, including financial and time efficiency, program customization and job training versus extensive and multi-skill training. This is in addition to the rising need for client-provider partnership (through program development, effective assessment support as well as the measurement of long-term ROI of training).

However, positively shaping these factors comes with a notable cost impact on the offered services by providers. To reach the middle ground, corporate clients need to set their priorities, be more proactive and open-minded when exploring their training need fulfillment options via optimizing the blend between off-the-shelf training solutions and customized solutions; while training providers need to effectively function as both partners and consultants to corporate clients; owning the client's challenges as theirs and craft the optimum offering to tackle those challenges.

Another key finding is the rising preference for large-sized local and multinational corporations to resort to in-house training rather than outsourced providers. This trend directly responds to the discussion above, in which corporates seek financial and time efficiency and tailor training programs to cater precisely to their job-skill needs. However, this option is not yet feasible for SMEs. Furthermore, training delivery formats offered by providers need to adapt to the changes witnessed in the corporate workstyles during the pandemic. While fully online delivery has been a savior in 2020 and 2021, face-to-face delivery continues to be the preferred method. However, with the change in work dynamics in general and the rising concern by corporates to support the work/life balance of employees, there has been an increase in demand for a blended delivery format.

Finally, the addressed points and reported preferences in this report call for further collaboration between training providers and corporates to fill the gaps, address the needs and reach midway solutions that will eventually end in satisfactory results on all fronts.

About AUC School of Business Executive Education

The AUC School of Business established its Executive Education unit in 1977 as a center of excellence to provide Egypt and the wider region with specialized executive education programs by offering open enrollment programs and business solutions. The full-fledged business solutions unit offers corporates off-the-shelf and customized training programs, as well as coaching and assessment services.

Constant evolution and reinvention are the hallmarks of our mission as we drive ourselves forward to increase our impact, maintain our relevance, and reflect the ever-changing business environment.

Between 2013 and 2020, the School of Business has been ranked by the Financial Times (FT) as one of the best business schools worldwide that offer open enrollment executive education programs, ranking at 67 in 2020.

Acting as a knowledge bridge between Egypt and the rest of the world, the AUC School of Business boasts an unrivalled reputation as the top private business school in Egypt and one of the best in Africa and the Arab World. Belonging to the 1% of business schools worldwide endowed with a “triple-crown” accreditation (AACSB, AMBA, and EQUIS), the school is dedicated to shaping the business leaders, entrepreneurs, and change agents of tomorrow by harnessing leadership, integrity, ambition, and excellence.



Abbreviations

AUC	The American University in Cairo
CBE	Central Bank of Egypt
UNICON	The International University Consortium for Executive Education
SMEs	Small and Medium Sized Enterprises
L&D	Learning and Development
RFP	Request for proposals

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