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Learning

HEALTH INDEX

STUDY 2021 | Middle East

Learning Health Index Report

INTELLIGENT SKILL BUILDING



Preface



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The advent of the COVID-19 pandemic has brought about a dynamic and unprecedented change in the business world, where leaders are faced with the challenge of creating business success in a new and unpredictable environment. It has become more important than ever for organizations to identify and develop skills that ensure success in the new normal post-COVID. We have observed that leading organizations in the region are now focusing on providing a best-in-class employee experience similar to customer experience. In the context of capability development, this trend has enabled organizations to keep Learners' interest at the center of the Learning and Development Strategy. Technological advancements have pushed the need to redefine the balance between humans and

machines at work to ensure a consistent learner experience. From the Middle East edition of the Learning Health Index Study – 2021, we have witnessed that organizations have a greater ambition to utilize state of the art learning technologies and applications to drive capability building within their organization. Despite the uncertainties in the global economic landscape, the growth story in the Middle East is very promising, given the vision of creating knowledge-based economies alongside the economic diversification plans. These mega-trends in the Learning and Development function have a major role in building capabilities for the future and changing the mindsets of the leaders and employees to be more agile while trying to introduce learning technology platforms.

Foreword



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The unprecedented impact of COVID-19 across industries has forced business leaders to navigate through uncharted waters, emphasizing the importance of identifying the key skill imperative for success, addressing managers' mindset around owning talent, and synergizing skill-based talent practices that drive agility. In lieu of most repetitive and routine tasks likely to be automated, work is being redefined to create valuable human-machine collaborations. As job roles are being deconstructed, redesigned, and retooled, organizations need to help their human talent to leverage machine capabilities. The Future of Work is an outcome of these severe and unprecedented changes that are impacting 'Work', 'Workforce' and 'Workplace' and present an enormous opportunity for the HR and learning community.

While some may say that workplace transformation is yet to be a reality, it is fair to say that organizations are beyond their cusp. They are actively embracing the 'New Normal' by acknowledging what lies ahead and scrutinizing existing systems, processes, and practices. This requires us to move away from our fascination with 'what has worked in the past' and to forge a new relationship with 'what is needed in the future.' With the advent of cognitive technologies, organizations are transforming the way they aggregate, create, curate, collect, interpret, disseminate and apply knowledge.

Employers can no longer rest on their laurels; they need to be experimental and make calculated bets on technologies like AI that are more likely to improve their work-life.

As the workforce gets more distributed, organizations need to devise ways of fostering a culture of collaboration and building a community. A collaborative learning environment is a conduit for creativity and innovation, and developing a culture of learning where employees become lifelong learners. Organizations need to reset, reboot, and renew their 'collective abilities' to perform, i.e., their learning health. To facilitate this change, organizations have begun rethinking their talent development strategies, as L&D is at the heart of the Future of Work.

L&D function need to constantly scan the horizon of learning to meet the growing demands of bridging the skill gap. It can be

achieved by enriching current job roles with evolving skill, competency requirements, deploying learner engagement tactics to engage modern-day learners, and creating a future-ready workforce.

This is the second year of the Learning Health Index (LHI) Report. We have witnessed how the pandemic has accelerated the arrival of the Future of Work, putting the spotlight on learning and skilling as the top priority for leaders. We have seen a big surge in learner engagement for enterprises that use LHI with a significant rise in monthly active users (MAU), unique learner coverage, and learning hours. All these are critical enablers for reshaping and rebuilding organizations, fitting into the new normal. Through this study, we have developed a deeper understanding of learning health in organizations by measuring their learning proficiencies in greater detail. We hope

that the actionable insights, tips, and expert views on key bottlenecks and opportunities captured in this report will help guide you in preparing a blueprint to address critical business challenges.

With a seat at the C-Suite table, L&D is in the strategic driver's seat and has the opportunity to create a multi-faceted and agile learning ecosystem, propagate a culture of continuous learning, build a more equitable workplace and leveraging the power of technology.

All in service of empowering individuals and organizations to work smart and achieve more - our vision at EdCast.

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Introduction



Introduction

About Learning Health Index 2021 Middle East Study

The Learning Health Index (LHI) is a joint initiative of Protiviti Member Firm for the Middle East Region and EdCast to diagnose the overall learning maturity of organizations in the Middle East. The study aims to help organizations identify their areas of excellence and improvement across various dimensions of learning health. Moreover, the study reports a comparative analysis of learning health across various industries and sectors as well as the best practices and trends in organizational learning. In 2021, 51 leading organizations from six countries in the Middle East participated in the LHI study. The analysis of the survey responses resulted in a quantitative score, which indicates an individual organization's overall learning health.

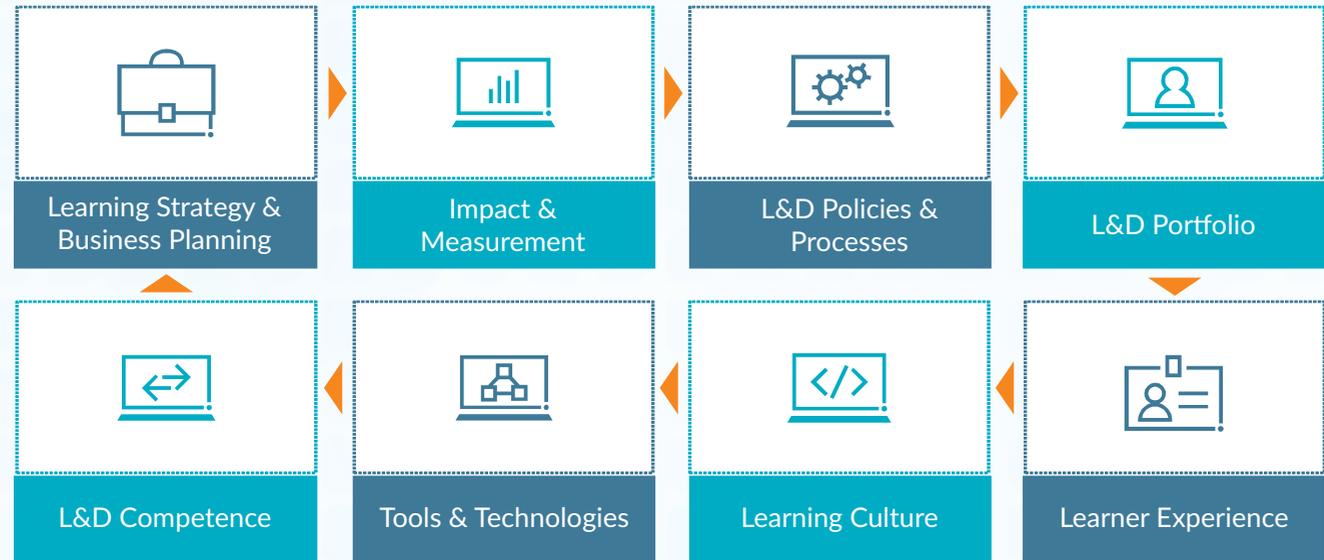
The LHI study is conducted using the Learning Health Framework developed by EdCast, which evaluated organizations based on 8 dimensions of learning. These dimensions are Learning Strategy & Business Planning, Impact & Measurement, L&D Policies & Processes, L&D Portfolio, Learner Experience, Learning Culture, Tools & Technologies, and L&D Competence. Organizations were evaluated in each of these dimensions using a 5-point scale. Using their scores, organizations can benchmark themselves against the overall market and/or industry they belong to and find their competitive positioning. Reviewing and assessing the scores on each of the dimensions provides an opportunity for organizations to take corrective actions.

The survey is best used as a diagnostic instrument— in other words, as a tool to foster and nurture learning; and not merely to serve as a report card. This model was tested for statistical reliability and gained a high score of 0.97 on Cronbach's alpha¹ test. This shows that the model and the questionnaire design for administering the survey accurately measure the variable of interest, which is organizational learning health.

¹Cronbach's alpha is a measure of internal consistency (or reliability) of a set of test items - meaning how well all the test items (or variables) measure a particular construct, which is the Learning Health.

Learning Health Framework

The Protiviti-EdCast Learning Health Framework is a comprehensive model comprising of eight distinct dimensions of learning that contribute to an organization's learning health. There are five Stages of Learning Health built into each of these dimensions. The framework includes a self-assessment tool designed from an HR and L&D practitioner's point of view, covering key aspects that define a healthy learning organization.



Dimensions of the Learning Health Framework

- 01**  **Learning Strategy & Business Planning**
The extent to which the current and future needs of the business drive the learning strategy and plan within the organization. How the learning & development budgets prepared and allocated? How agile is the learning function to change course and respond to business requirements?
- 02**  **Impact & Measurement**
What learning metrics are used to measure the efficiency and effectiveness of learning? To what extent does an organization use data analytics, predictive modeling in taking decisions related to talent and learning?
- 03**  **L&D Policies & Processes**
Learning processes involve the aggregation, creation, curation, collection, interpretation, and dissemination of knowledge. They include experimentation to develop and test new products and services; intelligence gathering to keep track of competition; customers' needs; various technological trends; analysis and interpretation to identify and solve problems; as well as education and training to develop employees.
- 04**  **L&D Portfolio**
The nature, type, and complexity of solutions & services that the function is entrusted to carry out in the organization e.g. performance consulting, knowledge management, change management, instructional design, business intelligence, content development, etc.

- 05**  **Learner Experience**
Learner experience embodies a “consumerized” approach that is hyper-personalized and multi-modal. Employees have the freedom to consume the knowledge when and where they want to from a wide range of content resources, tailored to their learning needs, style, preferences, and interests.
- 06**  **Learning Culture**
How much importance does an organization place on learning? Who takes accountability and what are the consequences related to learning? How are learners recognized and rewarded in the organization? What role do leaders, managers, and team members have to play?
- 07**  **Tools & Technologies**
What technologies are being used and to what extent these technologies assist in leading, enabling, managing, and supporting learning and development, as well as the 'learner' within the organization? How are learning technologies integrated with enterprise systems and with one another?
- 08**  **L&D Competence**
The core skills and capabilities required by L&D professionals for leading and managing a high-impact learning organization. At what level of proficiency is the L&D function operating within the organization? What are their strengths and areas of development?

5 Stages of Learning Maturity and Learning Health Index

AILING	COPING	DEVELOPING	NOURSHING	THRIVING
<p>Overall learning health is poor. The leadership is neither involved in L&D nor a sponsor of the learning agenda. Policies and processes are often absent or created on an ad-hoc basis to govern and manage learning. The learning environment is not supportive of the learner's needs.</p>	<p>Overall learning health is in the recovery stage, attempting to overcome its learning disabilities. Leadership involvement is sporadic and limited, policies and processes are loosely defined with limited use of technology tools to primarily support compliance and mandatory learning where learners are reactive users.</p>	<p>Overall learning health is stable and showing signs of improvement. Learning is tied to business requirements with involvement of the leadership on a need-to-know basis. Policies and processes are defined and often applied consistently. Technology tools are deployed to meet varied learner requirements across a broad set of technical and behavioral competencies.</p>	<p>Overall learning health is resilient and continues to grow. Leaders actively participate in identifying the current and future skilling needs. Policies and processes encourage experimentation and are always applied consistently. A suite of technology tools is deployed to provide personalized learning by meeting varied learning styles, preferences and goals with a mix of traditional and modern modalities.</p>	<p>Overall learning health is robust, and advancing vigorously. Learning strategy is integral to business success and leaders champion the learning agenda. L&D policies and processes encourage active experimentation and are seamlessly linked with all other HR systems and processes. A sophisticated suite of technology tools is deployed to make personalized and curated content accessible across all modes of learning on an 'Anytime - Anywhere' basis. Employees are empowered to steer their own learning journeys in line with their individual goals, learning styles and preferences. Learning as an experience is ubiquitous and deeply embedded in the flow of work. The need of the 'Modern Learner' is at the heart of the learning ecosystem.</p>
<p>Score between 20 - 39</p>	<p>Score between 40 - 59</p>	<p>Score between 60 - 79</p>	<p>Score between 80 - 99</p>	<p>Score of 100</p>

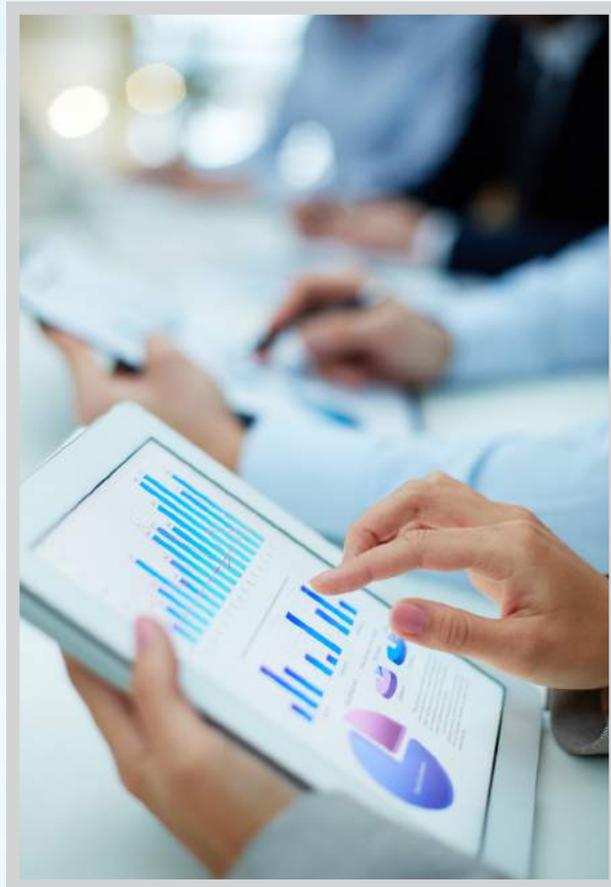
THE LEARNING HEALTH INDEX



Executive Summary



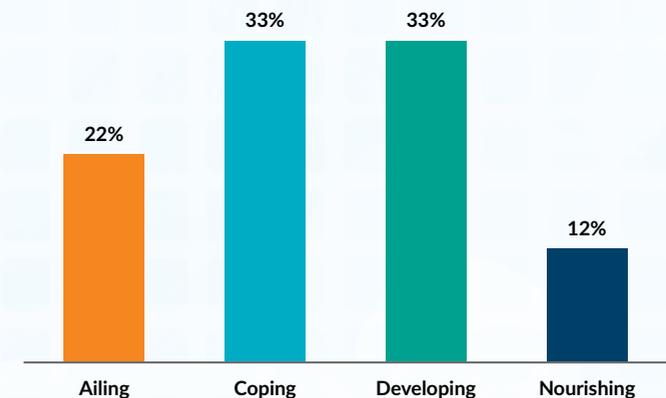
Executive Summary



The Protiviti-EdCast Learning Health Index (LHI) functions as a tool that organizations can use to measure their learning maturity comprehensively across the eight dimensions of learning health. The 2021 edition of the study had 51 organizations from UAE, Kingdom of Saudi Arabia, Qatar, Kuwait, Oman, and Bahrain participate in the LHI study representing various sectors. The overall LHI score in the Middle East region stands at 56, which means “Coping moving to Developing”.

The LHI study has found that there is a vast potential for organizations in the Middle East to implement advanced tools and technologies to facilitate learning since they are already well-established in terms of learning strategies and learning plans. The study revealed that 22% of the organizations are 'Ailing', 33% of the organizations are 'Coping', and another 33% of the organizations are 'Developing'. With upskilling and reskilling being a priority for

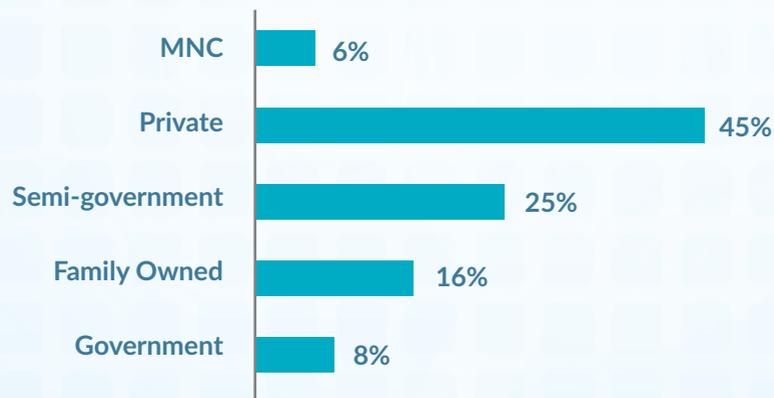
organizations as well as the fact that employees emphasize career development opportunities, there exists a need for systemic response. Hence, L&D teams need to adopt a holistic approach to build a comprehensive solution that addresses learning gaps in their organizations.



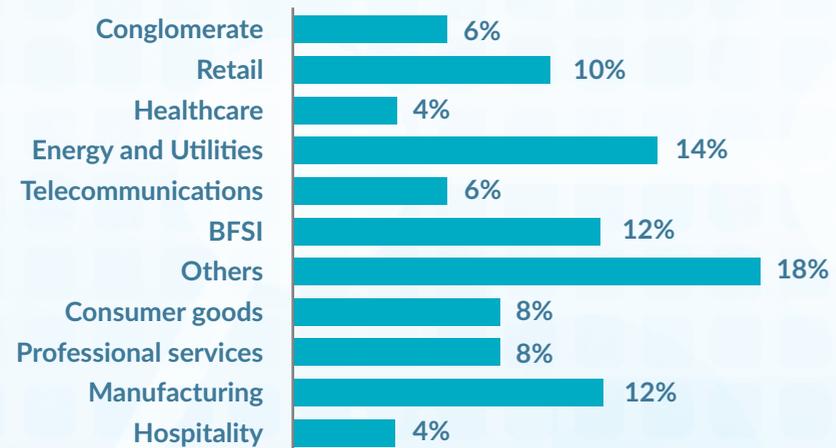
Overview of Participating Organizations in the Learning Health Index 2021 Middle East Study



5 PARTICIPATING SECTORS



11 PARTICIPATING INDUSTRIES



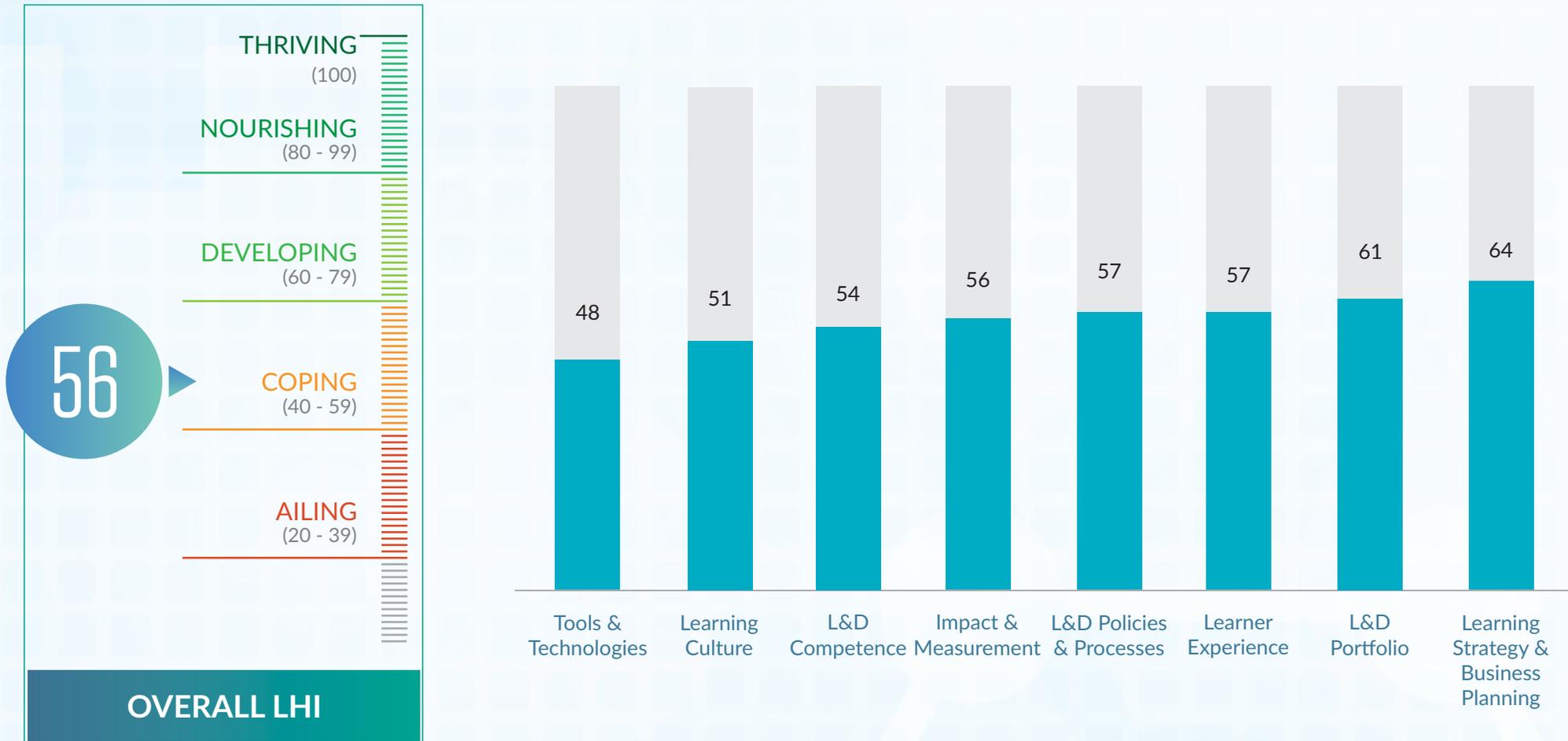


Wellness in Eight

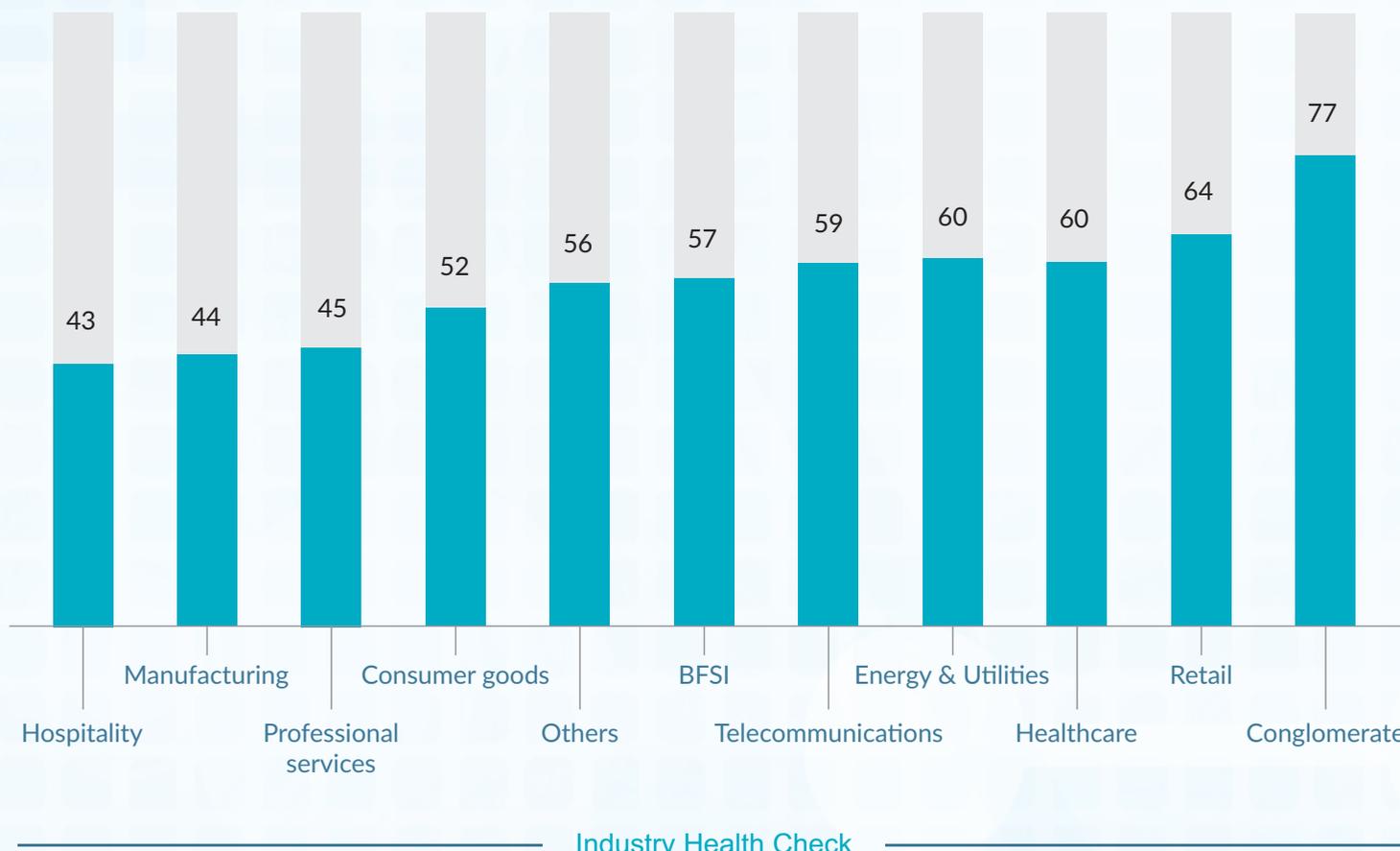


Wellness in Eight

Learning Health Across Dimensions in the Middle East



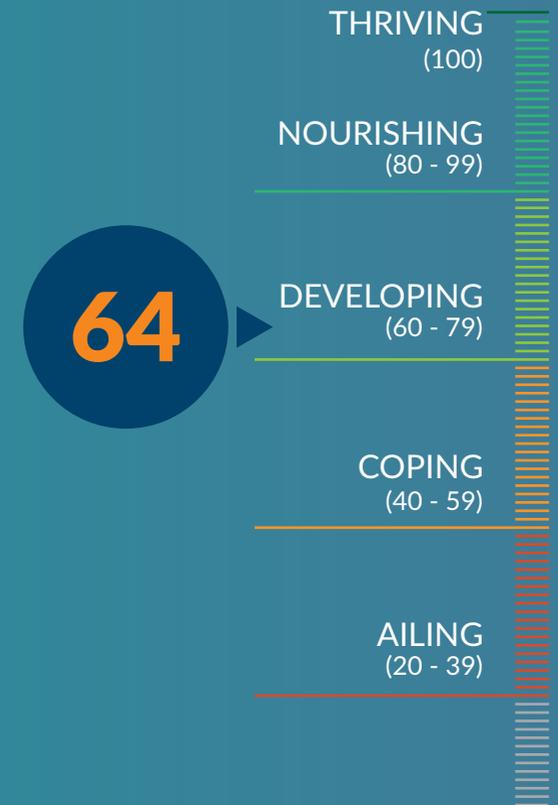
Learning Health Across Industries in the Middle East





Learning Strategy & Business Planning

Learning strategy should be driven by business requirements. This is the starting point and a prerequisite for any healthy learning ecosystem. An LHI score of 64 is the highest score amongst the eight dimensions.



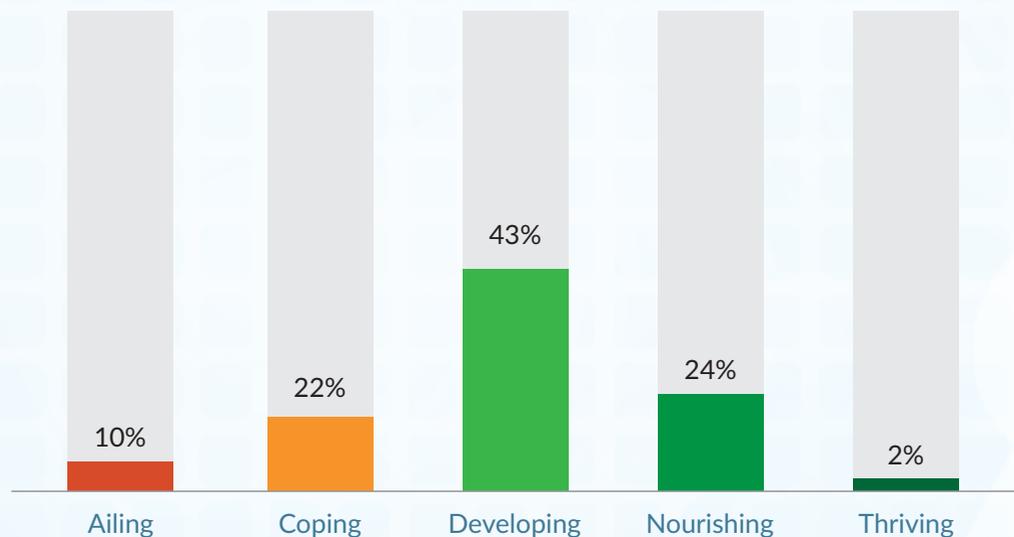
Key Insight: Learning Strategy & Business Planning

<p>56 Learning Agility</p> <p>The L&D function readjusts priorities based on business needs on an adhoc basis.</p>	<p>66 Learning Budgets</p> <p>The budget for learning needs is prepared and allocated on a case-by-case basis.</p>	<p>71 Alignment with business needs</p> <p>The business focuses on identifying the necessary skills required by the employees in the current and future scenarios on a case-by-case basis.</p>
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Overall score

64

ORGANIZATIONS ACROSS LEARNING HEALTH STAGES



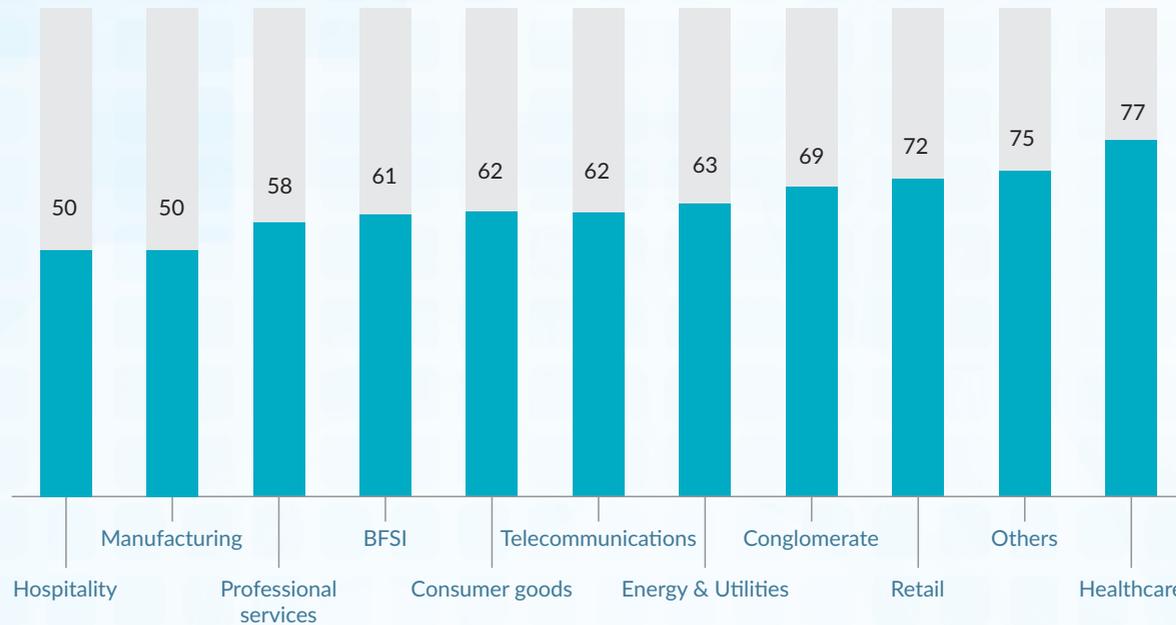
Percentage figures mentioned in the above graph is rounded off.

43% of the organizations prioritize learning and skilling for business needs.

2% of the organizations assess learning strategies within their annual business plans.

10% of the organizations are in the process of formalizing a learning budget.

Industry Health Check: Learning Strategy & Business Planning



77

The “Healthcare-industry” scored the highest LHI of 77 on Learning Strategy & Business Planning mainly due to the availability of additional budgets, given the pandemic.

50

The “Hospitality-industry” scored the lowest LHI of 50 on Learning Strategy & Business Planning due to the economic downturn faced by the sector in 2021.

50%

of the organizations in the “Manufacturing-industry” need to become agile in adjusting their L&D function to meet business needs.

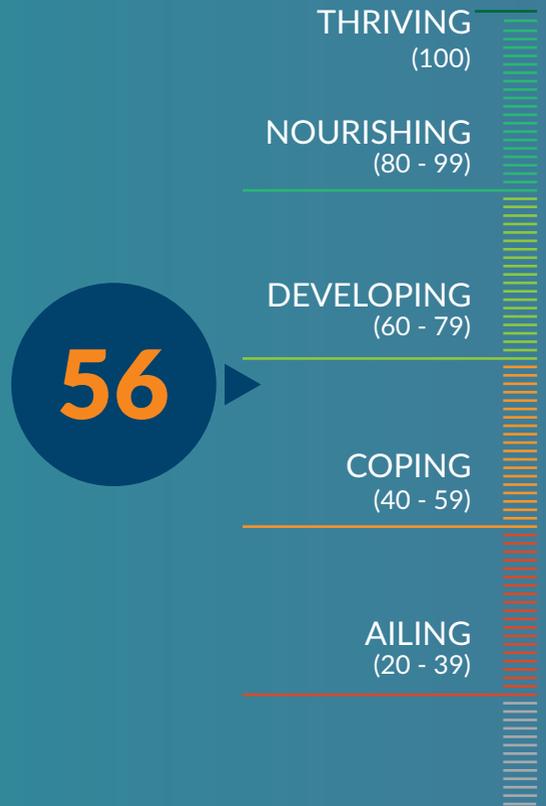
THE LAST WORD

Aligning learning strategy with business priorities is the starting point of a successful learning function. As strategic business partners, L&D teams must ensure that their organization's capability development initiatives support the mission of the businesses they work with. To build a sound learning strategy and plan, they should clearly articulate the few critical priorities and must-win battles to which the company and CEO are committed over the next three to five years. Governance councils must review the functioning of L&D periodically and improvise continuously to keep pace with the dynamic business environment. A mix of HR, learning, and business leaders in the governance councils can ensure balanced functioning.



Impact & Measurement

L&D's responsibility is not only to bring change but also to make results measurable and visible. At the end of the day, L&D's goal is to tie learning to results. This study reports a decent LHI score of 56, which is the same as the overall LHI score.



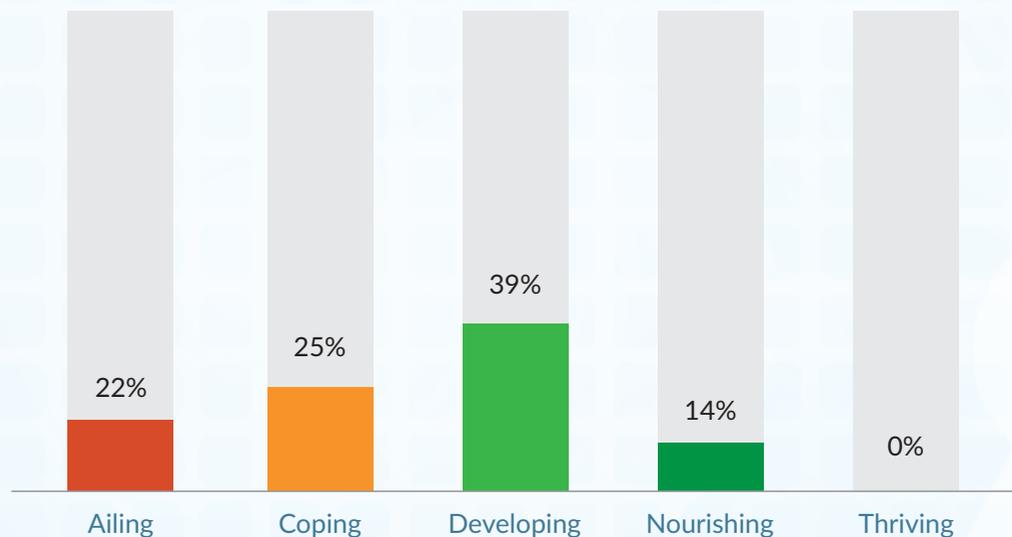
Key Insight: Impact & Measurement

<p>53 Real-time Analytics</p> <p>Availability of real-time analytics is limited and data on metrics is extracted at a defined periodicity.</p>	<p>56 Learning Metrics and Formulation</p> <p>A basic framework of metrics, mostly focused on usage (such as learning hours and attendance) is used to measure the effectiveness of learning interventions.</p>	<p>58 Data Analytics and Decision Making</p> <p>Data on learning metrics is utilized on a case-to-case basis, mainly to enhance the coverage of learning programs.</p>
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Overall score

56

ORGANIZATIONS ACROSS LEARNING HEALTH STAGES



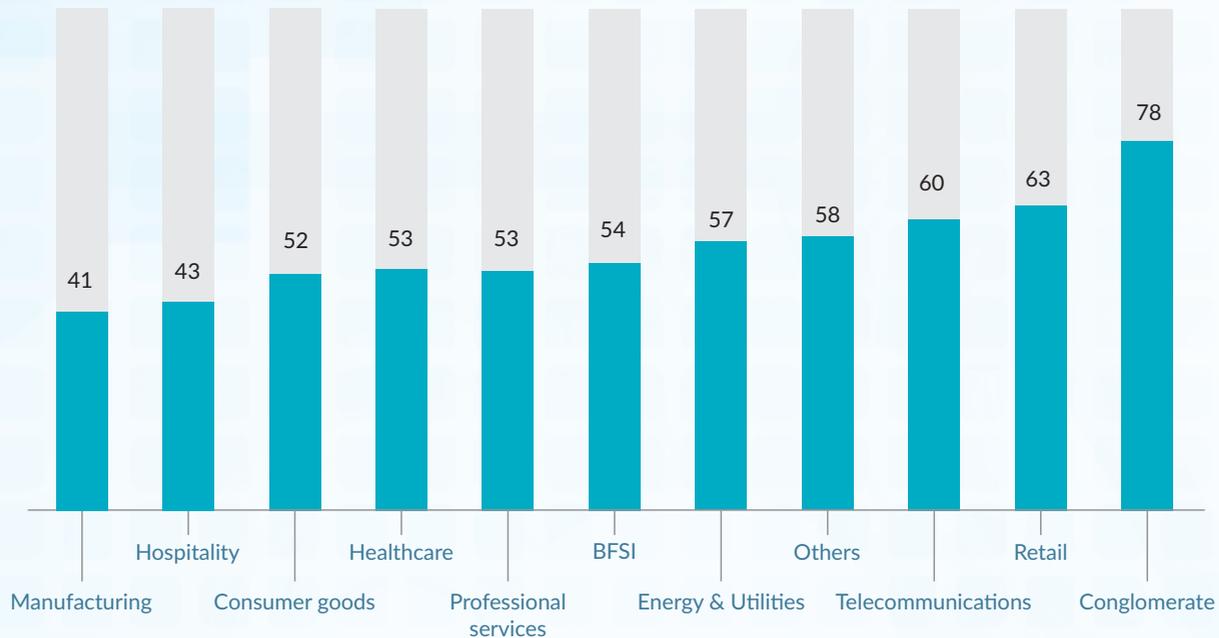
Percentage figures mentioned in the above graph is rounded off.

39% of the organizations utilize their learning framework to improve their learning interventions and consistently measure their effectiveness.

22% of the organizations do not have access to real-time data analytics on L&D functions' outcomes.

14% of the organizations make business decisions using learning metrics.

Industry Health Check: Impact & Measurement



78

Large “Conglomerate-industries” scored the highest LHI of 78 on Impact & Measurement.

41

The “Manufacturing-industry” scored the lowest LHI of 41 on Impact & Measurement.

100%

of the organizations in the “Conglomerate-industry” use an advanced framework of metrics to evaluate learning effectiveness.

50%

of the organizations in the “Professional Services - industry” utilize learning metrics to make business decisions due to the direct correlation between learning impact with business growth.

THE LAST WORD

L&D's responsibility is to not only to bring change but also make results measurable and visible. This will make them more accountable as professionals. However, most teams still rely on traditional metrics such as usage and satisfaction scores on learning programs and do not formulate nor capture data against outcome-based metrics such as the impact on individual performance, employee engagement, team effectiveness, business process improvement, etc., hindering their ability to raise performance and contribute to real business impact.



L&D Policies and Processes

L&D policies and processes define the rules and key action steps required to aggregate, create, curate, collect, interpret, disseminate and apply knowledge. For holistic talent development, policies & processes must enable and continuously reinforce everyday learning and its value concerning growth, advancement, and performance. The study reports a decent LHI score of 57.

57

THRIVING
(100)

NOURISHING
(80 - 99)

DEVELOPING
(60 - 79)

COPING
(40 - 59)

AILING
(20 - 39)



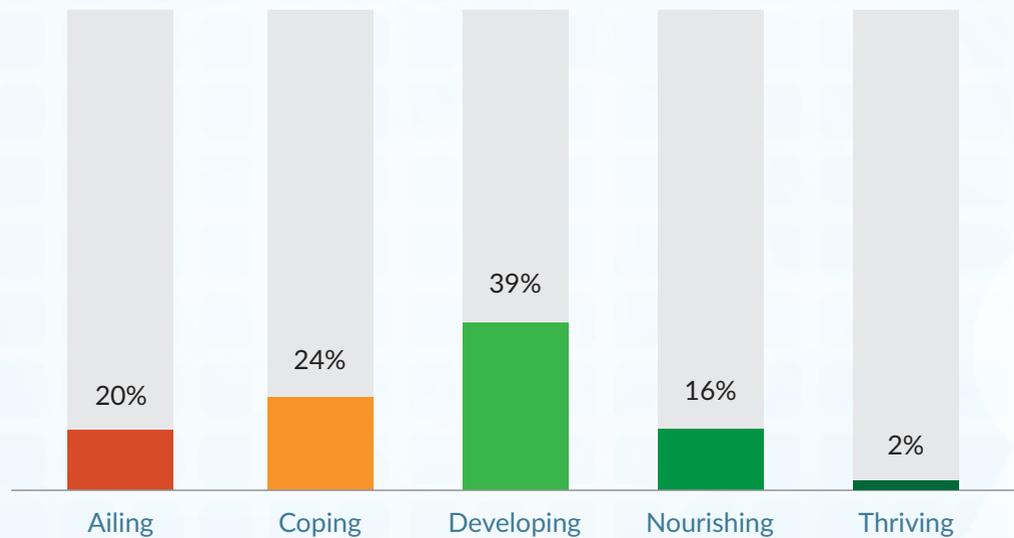
Key Insight: L&D Policies and Processes

<p>54 Learning and Experimentation</p> <p>L&D processes partially encourage active experimentation and are rarely tolerant of failure.</p>	<p>57 Integrated Systems and Processes</p> <p>L&D is primarily linked with the outcomes of the Performance Management System.</p>	<p>60 Content Creation Processes</p> <p>The learning content is created within the organization on a case-by-case basis.</p>
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Overall score

57

ORGANIZATIONS ACROSS LEARNING HEALTH STAGES



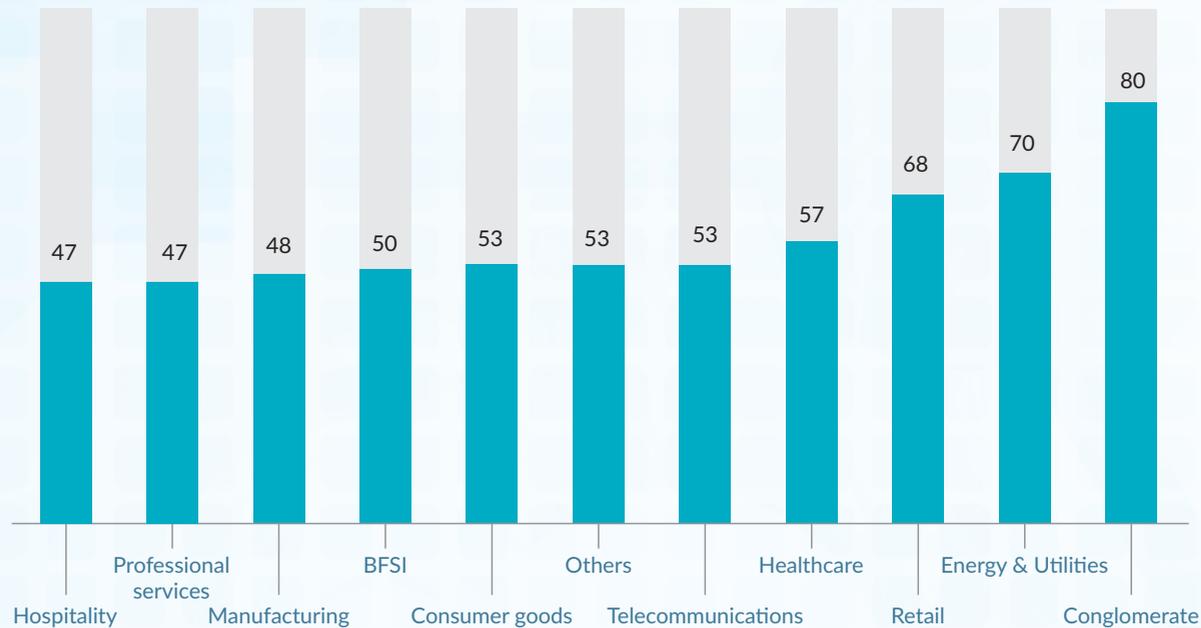
Percentage figures mentioned in the above graph is rounded off.

39% of the organizations relate learning and development with performance management and career development.

2% of the organizations connect learning and development with HR systems to drive talent strategy and leadership succession.

20% of the organizations are in the process of integrating L&D with other HR systems and processes.

Industry Health Check: L&D Policies and Processes



80

The “Conglomerate-industry” scored the highest LHI of 80 on L&D Policies and Processes.

47

The “Hospitality-industry” scored the lowest LHI of 47 on L&D Policies and Processes.

100%

of the organizations in the “Conglomerate-sector” highly encourage experimentation and the majority of them are tolerant towards failure.

44%

of the organizations in all industries are working towards integrating L&D with HR systems and processes.

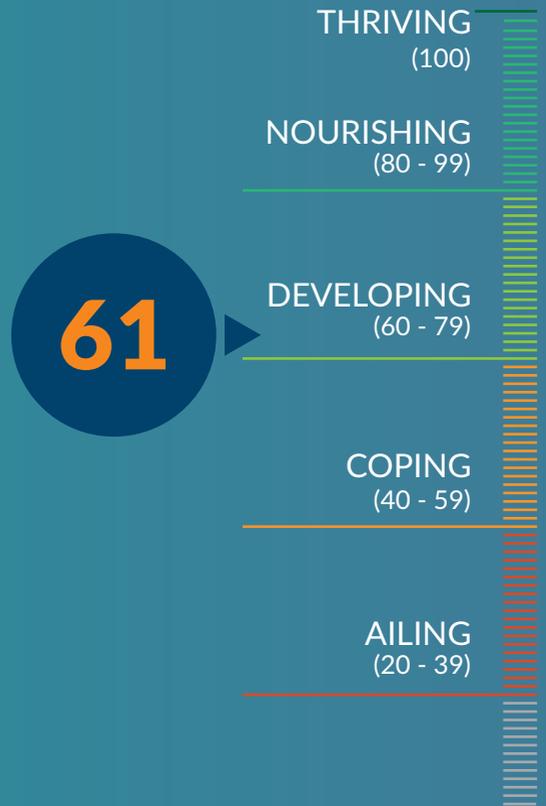
THE LAST WORD

Integrating learning into other talent programs has emerged as a top priority for learning leaders. All learning interventions should form an integral part of the overall HR and talent agenda. The L&D function cannot work in isolation if organizations wish to foster and sustain a culture of holistic talent development. Organizations have come to realize just how critical learning is to success in business. Enabled by the right technologies, connecting learning with HR Processes and systems provides employees with the opportunity to learn, bridge their skill gaps, and grow their careers.



L&D Portfolio

The role of L&D, the portfolio of solutions and services it provides using varied delivery methods, is a critical determinant of the overall learning health of an organization. A healthy LHI score of 61 is achieved, giving it the second-highest score amongst the dimensions.



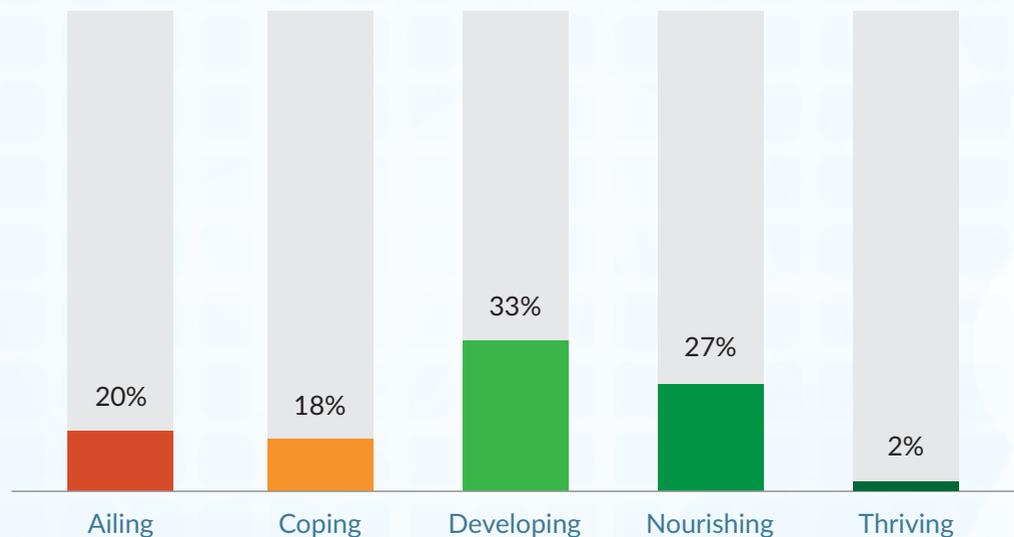
Key Insight: L&D Portfolio

<p>57 Learning Solutions Portfolio</p> <p>The range of learning services rendered partially address varied Content Types (Technical and Behavioral) but do not take employee experience levels into account.</p>	<p>60 Role of L&D</p> <p>Traditional learning channels are used to drive content development in response to learning needs.</p>	<p>65 Learning Modes</p> <p>The L&D Function sometimes leverages a mix of traditional and modern modalities like Instructor Led Training, Online Learning and Blended Learning.</p>
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Overall score

61

ORGANIZATIONS ACROSS LEARNING HEALTH STAGES



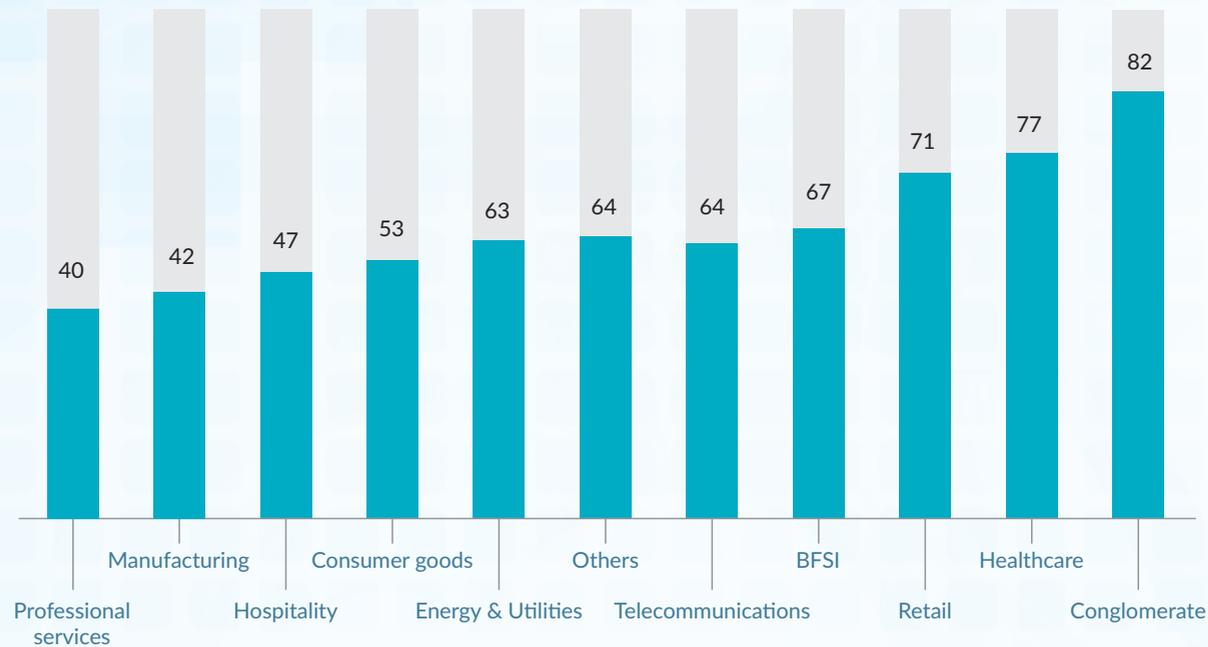
Percentage figures mentioned in the above graph is rounded off.

33% of the organizations provide training through traditional methods. However, modern methods like Online and Blended Learning are gaining popularity with 29% of the organizations.

2% of the organizations take employee experience levels and their personal learning preferences into account when deciding on learning types.

20% of the organizations are yet to consider the learning experience of employees. These organizations only provide traditional forms of mentoring and coaching.

Industry Health Check: L&D Portfolio



82

The “Conglomerate-industry” scored the highest LHI of 82 on L&D Portfolio.

40

The “Professional Services – industry” scored the lowest LHI of 40 on L&D Portfolio.

100%

of the organizations in the “Telecommunications -industries” and “Conglomerate-industries” have various modes of learning, ensuring an excellent learning experience.

80%

of the organizations in the “Retail-industries” provide both technical and behavioral training with their learning service.

71%

of the organizations in the “Energy and Utilities industry” have their L&D teams provide performance consulting/mentoring to drive behavioral and cultural change.

THE LAST WORD

L&D functions should continue to upgrade the nature and quality of services and solutions they provide to meet the evolving and rapidly changing needs of the business. While in many organizations, L&D is still tactical and operational, a few have raised their game where they continuously reconfigure the learning ecosystem architecture addressing both form and function. They enable key performance outcomes through consulting, orchestrating, and managing knowledge flows, drive change in learner behaviors and mindset, and design personalized learning experiences using a mix of traditional and modern learning modes.



Learner Experience

Learner Experience embodies a 'consumer' approach that is hyper-personalized and multi-modal. The key to enhancing this is by giving learners the freedom to consume the knowledge 'Anytime- Anywhere,' from a wide range of content resources tailored to their learning needs, styles, preferences, and interests. The study reports a decent LHI score of 57.

57

THRIVING
(100)

NOURISHING
(80 - 99)

DEVELOPING
(60 - 79)

COPING
(40 - 59)

AILING
(20 - 39)



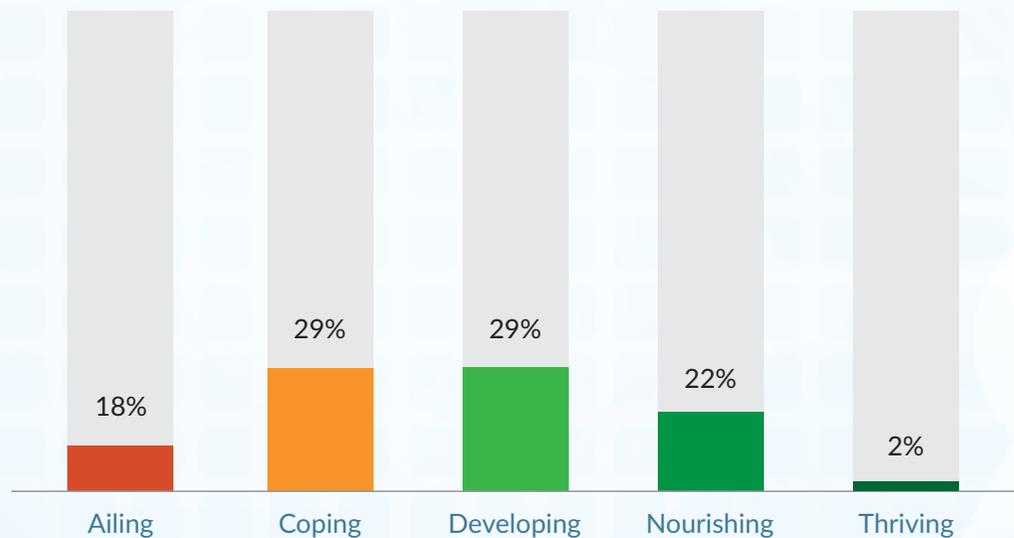
Key Insight: Learner Experience

<p>55 Personalization of learning</p> <p>Learning journeys are rarely personalized to accommodate the learning styles, preferences and learning goals of individuals.</p>	<p>58 Accessibility of Learning</p> <p>Learning solutions are made available on designated platforms only, which are accessible on company controlled networks, however are available both during and after official work hours.</p>	<p>58 Democratization of Learning</p> <p>Employees are partially empowered to drive their own development through the existing framework of development interventions provided to them by the organization.</p>
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Overall score

57

ORGANIZATIONS ACROSS LEARNING HEALTH STAGES



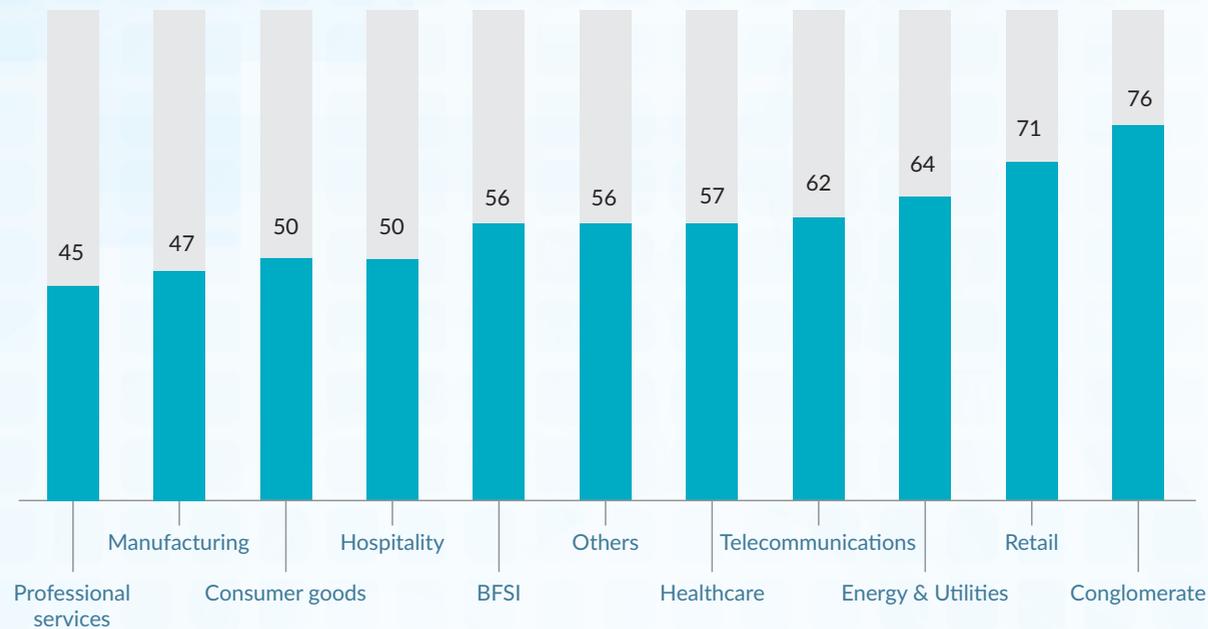
Percentage figures mentioned in the above graph is rounded off.

29% of the organizations allow their employees to develop their skills according to their learning needs and preferences. While another 29% of the organizations only provide a set number of learning options.

2% of the organizations have a learning ecosystem, which allows employees to choose their learning schedules and lessons as per their learning styles and career aspirations.

18% of the organizations are exploring options to introduce personalized learning to their employees.

Industry Health Check: Learner Experience



76 The “Conglomerate-industry” scored the highest LHI of 76 on Learner Experience.

45 The “Professional Services - industry” scored the lowest LHI of 45 on Learner Experience.

75% of the organizations in the “Consumer goods - industry” are yet to introduce learning objectives and personalized learning for its employees.

57% of the organizations in the “Retail-industry” provide both technical and behavioral training in their learning service.

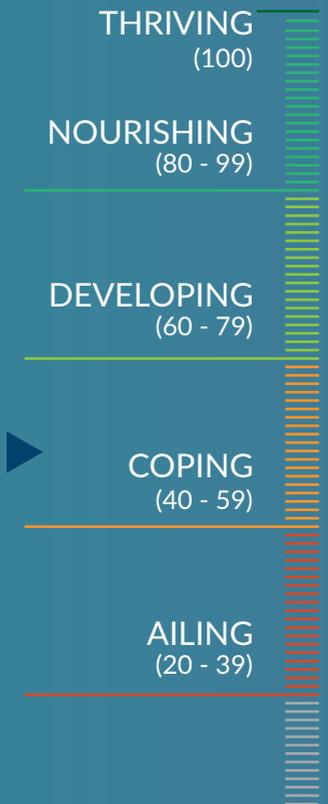
THE LAST WORD

L&D professionals need to design experiences with the ultimate goal of motivating learners to want to learn and achieve their goals. The design process is creative and iterative and requires a deep understanding of why and how individuals learn. A critical part of designing impactful learning experiences is in the selection of the content, pedagogy, and technology which is primarily determined by the learning goals of the learner. Progressive organizations are using Learning Experience Platforms to tailor experiences suited to learners' preferences, interests, and needs with easy access to content that is displayed in a familiar and easy-to-navigate pattern. They are leveraging AI to create intelligent and smarter-positioned content that's adaptive, intuitive, and responsive to a learner's personal journey, providing a great learner experience.



Learning Culture

Learning culture is a collection of beliefs, processes, and practices that enable individuals to continuously learn and grow. Learning culture is the lifeline of an organization's ecosystem. It drives an independent quest for knowledge and promotes shared learning directed towards the goals of the organization. The study reports a decent LHI score of 51.



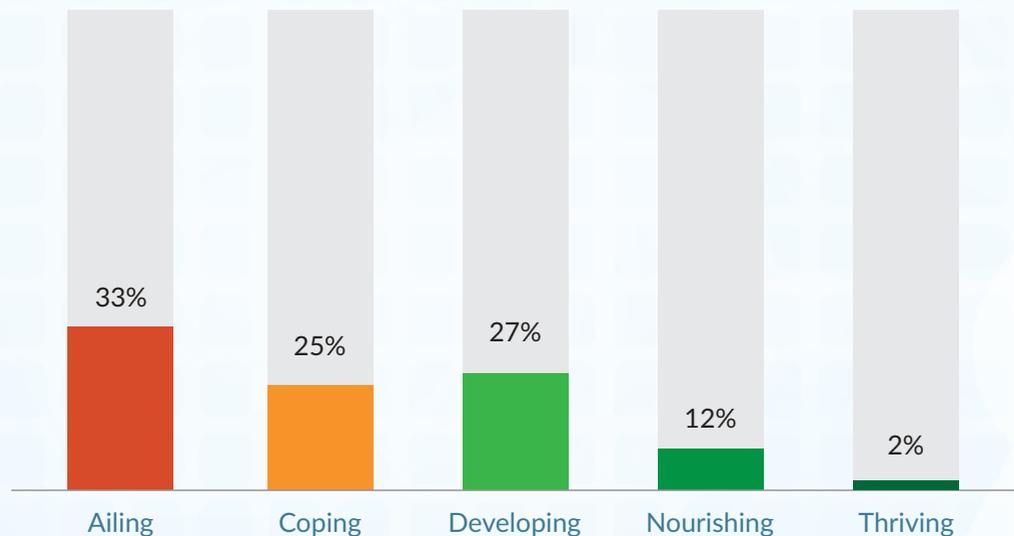
Key Insight: Learning Culture

<p>50 Accountability for Learning</p> <p>Employees can respond to the nature of learning services and opportunities that are available to them.</p>	<p>51 Rewards and Recognition</p> <p>There is a rudimentary framework to reward and recognize learning, which may change on a case-by-case basis.</p>	<p>53 Perceived Value of Learning</p> <p>Learning is perceived to be somewhat valuable for employee development. Employees associate learning with compliance and mandatory trainings only.</p>
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Overall score

51

ORGANIZATIONS ACROSS LEARNING HEALTH STAGES



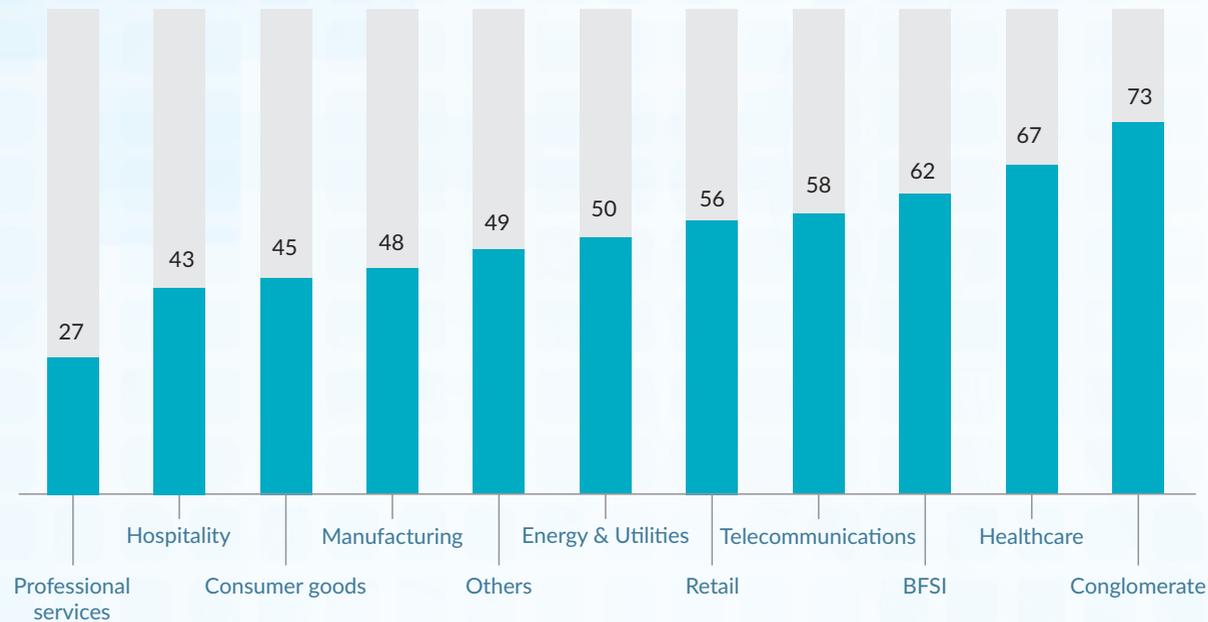
Percentage figures mentioned in the above graph is rounded off.

33% of the organizations are yet to consider organizational learning as an essential element for employee development.

27% of the organizations consider organizational learning valuable for employee development and reward employees for their learning achievements.

2% of the organizations have their employees steer their learning journey with the use of advanced learning tools and programs.

Industry Health Check: Learning Culture



73

The “Conglomerate-industry” scored the highest LHI of 73 on Learning Culture.

27

The “Professional Services – industry” scored the lowest LHI of 27 on Learning Culture.

67%

of the organizations in the “BFSI-industry” inherently consider learning to be the main factor for employee development.

75%

of the organizations in the “Professional Services – industry” are yet to recognize employees for their learning achievements.

THE LAST WORD

Driving culture change requires learning leaders to create an environment where individuals experience work as an opportunity for development, career advancement, and self-discovery. They need to build a culture of commitment rather than one of compliance, where employees learn and work together and achieve mastery in their field of interest. To nurture keen and active learners, organizations need to motivate and recognize learners through a comprehensive organization-wide R&R framework. L&D leaders should leverage senior executives in organizations to champion and promote a culture of continuous learning. The key to driving learner engagement and bringing about this culture shift is equally dependent on managers making learning a top priority for their teams.



Tools and Technologies

The most significant enablers for just-in-time learning are technology platforms and applications. The need of the hour is for organizations to leverage technology to lead, manage and support the needs of the learner. The study reports an LHI score of 47.

48

THRIVING
(100)

NOURISHING
(80 - 99)

DEVELOPING
(60 - 79)

COPING
(40 - 59)

AILING
(20 - 39)



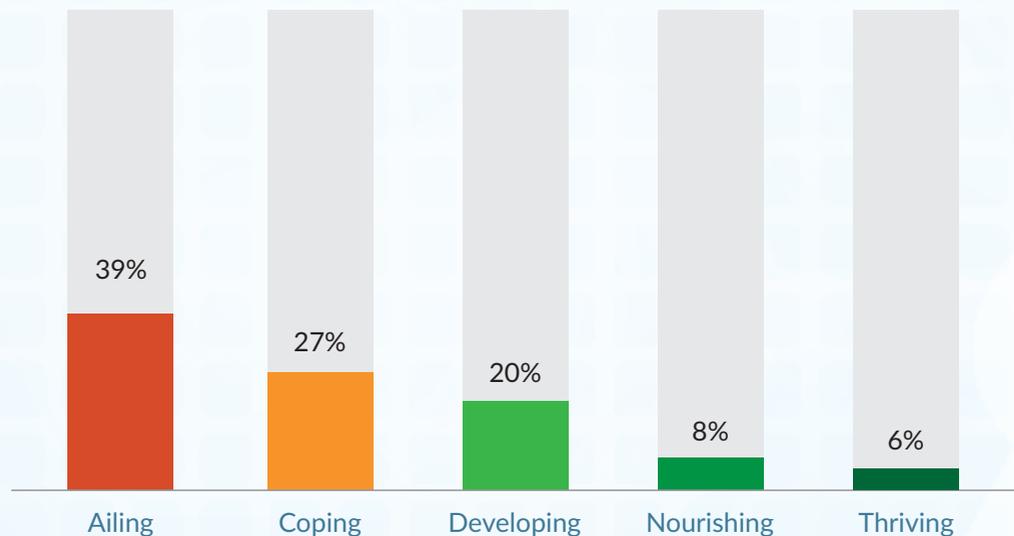
Key Insight: Tools and Technologies

<p>47 Integrated Technology Platforms</p> <p>A few elements of the HRMS are integrated with learning platforms, but most exist as standalone components.</p>	<p>48 Knowledge Networks & Social Learning</p> <p>Rudimentary platforms are used for Knowledge Management and Social Learning.</p>	<p>48 Learning in the Flow of Work</p> <p>A somewhat sophisticated suite of tools & technologies is leveraged to streamline the flow of information and provide learning at the point of need.</p>
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Overall score

48

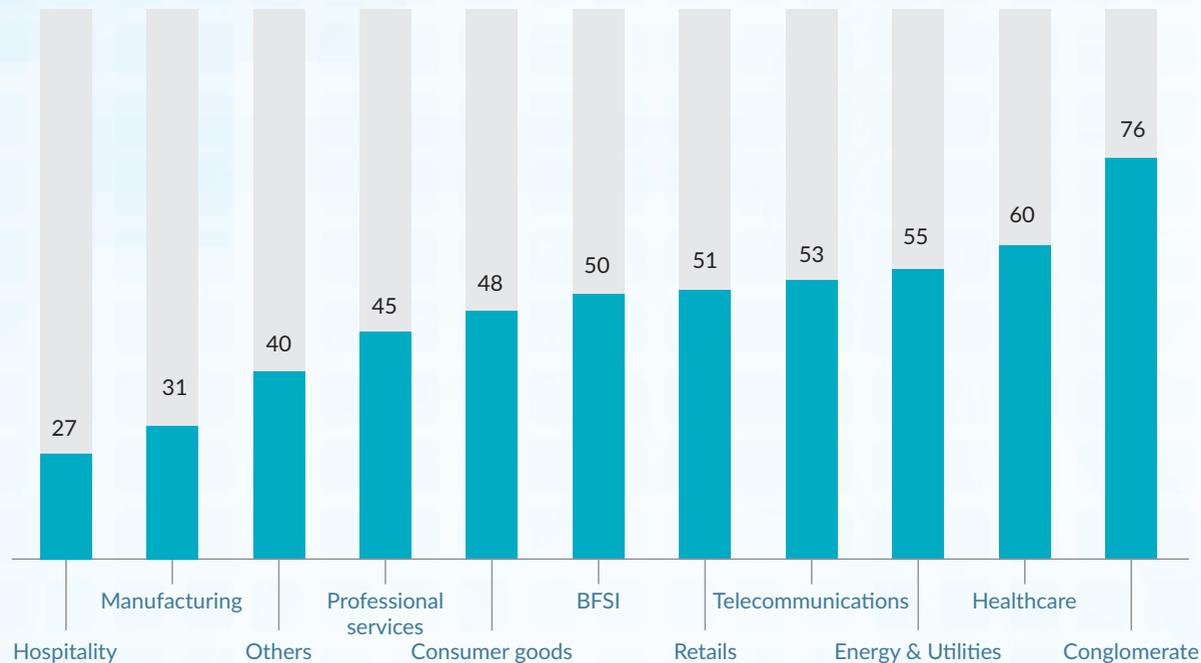
ORGANIZATIONS ACROSS LEARNING HEALTH STAGES



Percentage figures mentioned in the above graph is rounded off.

- 39%** of the organizations need a learning system tools and technologies to facilitate learning. Further, they rely on a robust platform to manage knowledge and social collaboration for learning.
- 20%** of the organizations have internal and external knowledge networks to effectively engage with learners.
- 6%** of the organizations' learners have control over their learning and development goals.

Industry Health Check: Tools and Technologies



76 The “Conglomerate-industry” scored the highest LHI of 76 on Tools & Technologies.

27 The “Hospitality-industry” scored the lowest LHI of 27 on Tools & Technologies.

67% of the organizations in the “Conglomerate-industry” have well-defined platforms for knowledge management and social learning, with HRM elements integrated into them.

100% of the organizations in the “Healthcare-industry” have multiple elements of HRM integrated into learning platforms.

100% of the organizations in the “Hospitality-industry” and the “Manufacturing-industry” are in the process of implementing a suite of tools and technologies to respond to learning needs.

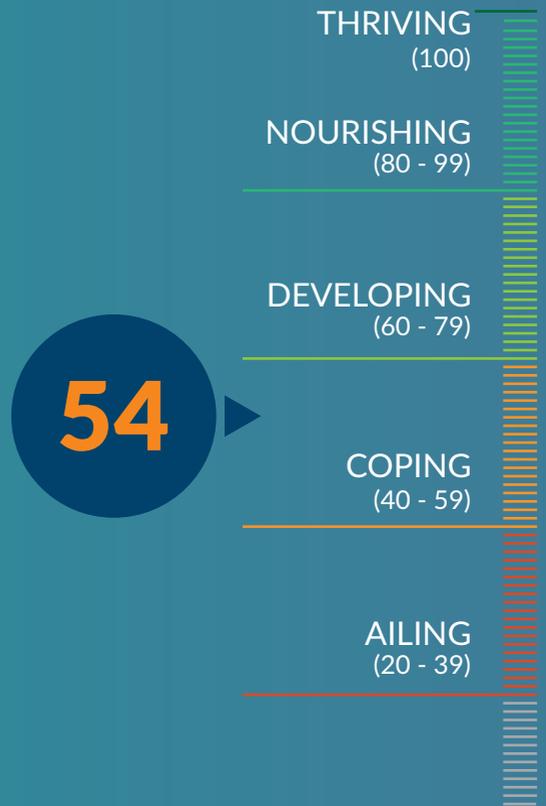
THE LAST WORD

Technology has played a pivotal role and served as a lifeline during the pandemic. HR technology has moved from 'good to have' to 'must have' given the growing importance on productivity, employee experience, wellbeing, and skilling. Organizations are actively looking for a tech stack spanning HR tech, workplace tech, talent, and learning tech, and team and productivity tools with a sophisticated integration framework, allowing knowledge to flow freely and unobstructed between systems and tools. This has led to a total redesign with a single user interface for the employee with the primary objective of getting work done easily, improving productivity, connecting peers, and enhancing learner experience and engagement. With millions of workers across the globe spending more and more time on business collaboration and work platforms such as Microsoft Teams, Slack, Zoom, and Webex, organizations have integrated learning, in the flow of work, by embedding learning in these systems of productivity. This seamlessly integrates learning with an employee's workday, making it easy for them to bridge critical skill gaps and increase their productivity.



Learning & Development Competence

In today's day and age, L&D professionals need to go beyond the conventional and embrace the new. The quickest way to make learning impactful and improve organizational learning health is by investing in the competence of L&D. The study reports a decent LHI score of 54.



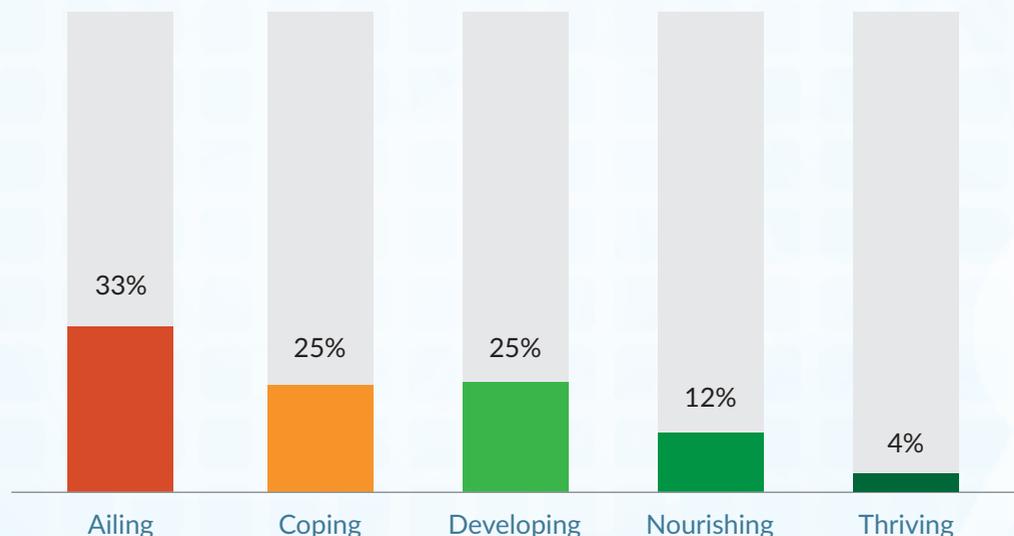
Key Insight: Learning & Development Competence

<p>50 L&D Skills and Capability</p> <p>L&D competencies and skills are defined to a certain extent and require a more elaborate definition. Some members of the L&D Team have a background in learning.</p>	<p>54 Future-Oriented L&D</p> <p>The L&D function focuses on establishing efficiencies within the existing framework of systems and modalities. Some attempts to leverage the latest developments in Learning are made, however, in a largely unstructured manner.</p>	<p>57 Role Modeling Learning Behaviors</p> <p>Some members of the L&D function role model learning behaviors, however in a largely ad hoc manner.</p>
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Overall score

54

ORGANIZATIONS ACROSS LEARNING HEALTH STAGES



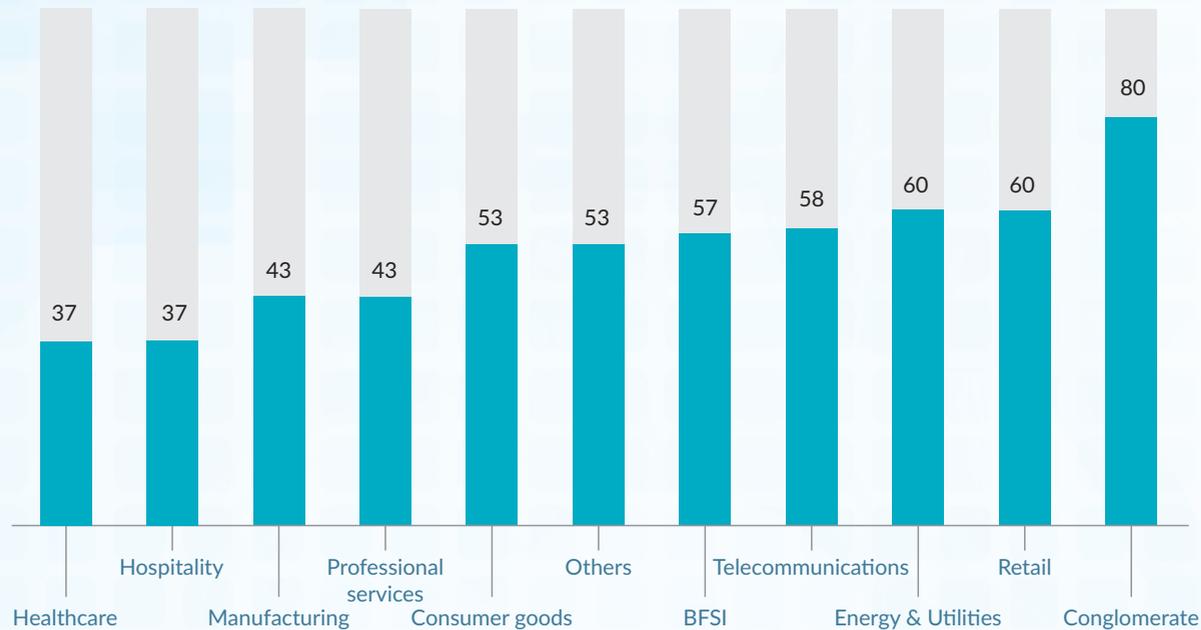
Percentage figures mentioned in the above graph is rounded off.

33% of the organizations' L&D team members need to upskill and act as role models to employees to help them adopt good learning behavior.

25% of the organizations' L&D team members regularly utilize learning platforms, which boosts employees' motivation to use learning tools and technologies.

4% of the organizations have hired experienced and skillful professionals for their L&D function.

Industry Health Check: Learning & Development Competence



80

The “Conglomerate-industry” scored the highest LHI of 80 on Learning & Development Competence.

37

The “Healthcare-industry” scored the lowest LHI of 37 on Learning & Development Competence.

100%

of the organizations in the “Conglomerate-industry” use employees' learning insights to adjust the Talent Strategy and address the current and future skilling needs.

67%

of the organizations in the “Manufacturing-industry” are yet to employ skilled L&D professionals for learning functions. The same proportion of organizations in the Telecommunication sector have adopted learning platforms that help in continuous learning.

THE LAST WORD

In the age of modern learning, no learning intervention is complete without technology. L&D professionals need to consistently upskill and reskill themselves with new, specialized capabilities including brand and communication, technology and application development, experience design, content curation, and data analysis. HR & L&D is a group of extraordinary potential: the potential to craft life-changing experiences, impact productivity and engagement and drive change. But to do this in today's day and age, they need to go beyond the conventional and embrace the new, working in partnership with the business to meet organizational goals.

Technology and Future of Learning

Future Forecast on Technological Trends



Top 6 Technological Trends

The pandemic has accelerated the adoption of remote working and digital learning tools across organizations. With the change in the corporate landscape, organizations continue to leverage technology to bridge the skill gap to enable skilling, upskilling and reskilling. The use of AI and machine learning is gaining momentum, creating more personalized and relevant experiences for employees. AI is also being used to enhance the overall employee experience from 'hire to retire', improving transparency and inclusion.

There are visible shifts taking place in the L&D tools and platforms marketplace. There is a clear move away from the Learning Management System (LMS) as being the core learning platform to those that are dynamic, promote self-directed learning and personalized learning experiences that employees are looking for (LXP, micro-learning platforms, etc.).

Overview of Technological Trends

Organizations in the Middle East have a tremendous opportunity to use advanced technologies to drive organizational learning. While it can be observed that organizations have a higher level of ambition to use technologies, they should employ them quickly to survive in the post-pandemic world.



01

MOBILE LEARNING



02

USER OF AI



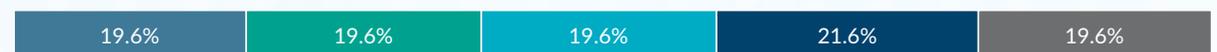
03

USE OF GAMIFICATION



04

SOCIAL LEARNING



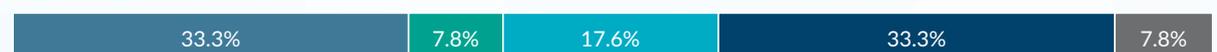
05

PERSONALIZED LEARNING



06

LEARNING IN THE FLOW OF WORK



- Already Under Implementation
- Planned for Implementation within in Next Year
- Planned for Implementation within the Next Two Years
- Might get implemented, but Unsure of Timeline
- Haven't Thought about it

Percentage figures mentioned in the above graph is rounded off.

Future Forecast – Key Insights



LEARNING IN THE FLOW OF WORK

Popular in Technical Fields



33% of the organizations are already implementing learning in the flow of work and 26% of the organizations are planning to implement the same in the next one to two years.



50% of the organizations in the Manufacturing sector have already implemented learning as part of their business applications.



PERSONALIZED LEARNING

Slow but Steady



24% of the organizations are already implementing personalized learning initiatives and 34% of the organizations are planning to implement the same in the next one or two years.



Future Forecast – Key Insights



SOCIAL LEARNING

Collaboration is Key



59% of the organizations are already implementing social learning or they are planning to implement it in the next one to two years.



19% of the organizations have no plans to implement Social Learning in the near future



USE OF GAMIFICATION

A New Trend to Adopt



16% of the organizations have implemented gamification.



53% of the organizations are already implementing gamification with some organizations planning to implement it in one or two years.

Future Forecast – Key Insights



USE OF ARTIFICIAL INTELLIGENCE

The Future is AI



10% of the organizations have adopted AI technology, which makes it the least implemented technology.



63% of the organizations have planned to implement AI in L&D over the next one to two years.



MOBILE LEARNING

Most Popular



41% of the organizations have implemented mobile learning making it the highest adopted technology.



26% of the organizations have plans to implement mobile learning in the next two years

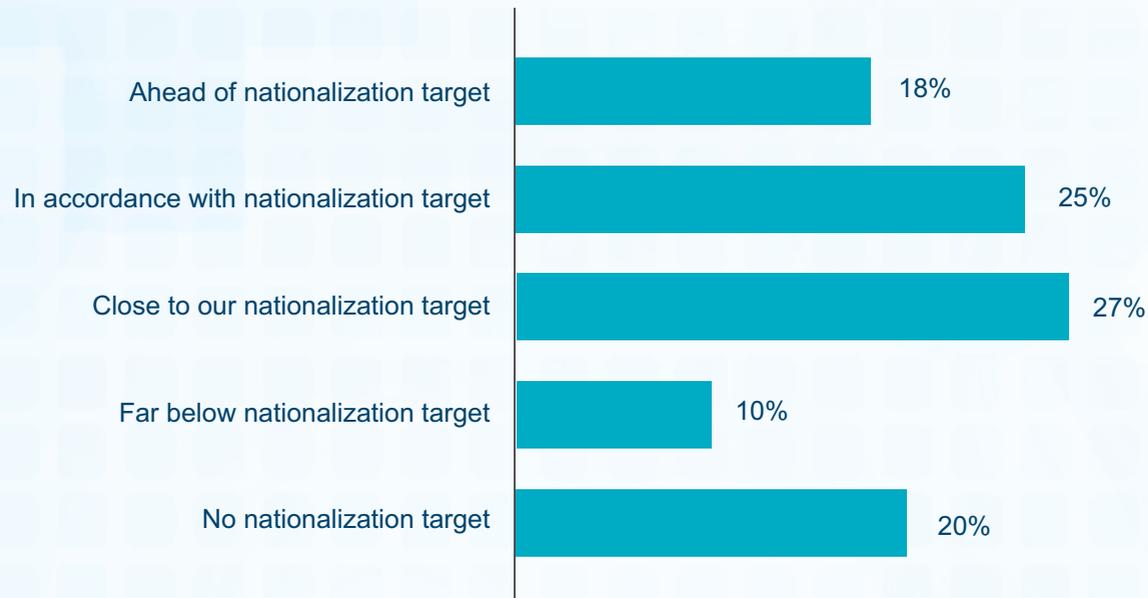
The Nationalization Drive in the Middle East



The Nationalization drive in the Middle East is aimed at developing local talent and increasing their employment in the labor market. This strategic initiative helps GCC nationals to overcome employment barriers and strengthen the countries' economic position in the global market. With the development of local talent, new opportunities for nationals would be created, which will also reduce dependency on expatriate workforce. As the economies of the GCC nations have become more diversified beyond Energy sector, it is essential to evaluate the learning and development of nationals, which will help foster their participation in new job functions within diversified sectors like services, technology, e-commerce, etc.

The Protiviti-EdCast Learning Health Index (LHI) study in the Middle East reports on the organizations' success in achieving the nationalization targets and initiatives. Further, the study reports on the L&D budget allocation for nationals and presents insights on the employment of nationals in various industries. In addition, this section includes the effectiveness of various learning programs that are used to develop nationals.

Trends in Achieving Nationalization Target



43% of the organizations have fulfilled their nationalization target.

20% of the organizations do not have a nationalization target.

Key Insights on the Integration of Nationals in the Local Economy

Integration of Nationals Across Industries: Greater employment of nationals is needed in technical roles across industries



ROLE DIVISION



80% of the industries have hired more national talent in managerial positions than in technical positions.



20% of the industries have hired more of the national talent in technical positions than managerial positions. This reflects the need for GCC countries to develop Nationals to take over technical streams.



EFFECTIVENESS OF INTEGRATION



24% of the organizations are highly effective in integrating nationals in managerial roles, whereas only 14% of the organizations are highly effective in integrating nationals in technical roles.



- The BFSI industry is equally effective in employing nationals in both managerial and technical roles.
- The Energy and Utilities industry is yet to effectively employ nationals in technical roles.

Navigating Through Uncharted Waters

Lessons from COVID-19



NEW LEARNINGS FOR A REMOTE WORK ENVIRONMENT

Effectively navigating the paradigm shift from traditional to digital is critical for business growth and success. A sustained effort of reskilling the workforce for employees to succeed in their jobs in a remote work environment is a must.



DIGITAL TRANSFORMATION OF LEARNING

Traditional methods of learning have given way to microlearning and social learning that is available to learners at any time across a variety of platforms, as per their convenience. To leverage this just-in-time learning approach, organizations are reassessing and deploying new learning tools, techniques, and technologies that personalize learning at scale, ensuring maximum learner engagement.



SPOTLIGHT ON EMPLOYEE WELLBEING

The COVID-19 pandemic highlighted the problem of employee stress, fatigue, and burnout with organizations realizing its negative impact on efficiency and bottom-line. L&D teams are paying greater attention to building resilience, agility, empathy, mental and physical wellness in their employees.



CONTINUOUS UPSKILLING AND RESKILLING OF TECHNICAL SKILLS

Organizations are assessing the impact of emerging technologies such as AI, Big Data, and Analytics on job roles while continuously upskilling and reskilling employees on their technical skills based on the disruptions and innovations that these technologies bring.



LONG-TERM LEARNING FOCUS

Upskilling and reskilling may focus on skills for immediate use given how quickly skills are getting outdated. However, organizations should equally address long-term learning needs by honing skills such as creativity and innovation that are harder to master and require a long-term approach.



FOCUS ON SKILL-BASED CREDENTIALS

Micro-credentials provide the opportunity to gain skills that are needed for a job, where formal degrees are no longer a prerequisite for employment. Some of the largest tech giants prefer specific skill-based credentials as opposed to traditional college degrees.



BUILDING A COMPETENCY-BASED LEARNING ECOSYSTEM

The post-Covid job market requires organizations to build a competency-based learning ecosystem driven by an agile competency-based credentialing system, a standardized approach for identifying and recognizing competencies, and micro-credentials as building blocks for bundled credentials.

Leadership Speak

Ahmed Alsudais

Organization: Al – Rajhi Bank, KSA

“ Organizations need to ensure that Employees' learning path is aligned to their career. Consecutively, the learning and development function needs to channel their investments on the right type of learning assets (including content and platform) to create the necessary impact. Finally, there must be a constant dialogue with the employees and their line managers to understand their preferences and learning goals. ”

Mubarak AlMansoori

Organization: Agthia Group, UAE

“ The COVID-19 pandemic has accelerated technological trends in organizations, causing them to adapt to new and innovative ways of working. This has imposed a huge challenge for L&D teams to develop alternative mechanisms to build people capabilities. The traditional modes of capability building are no longer effective in the new normal, so organizations need to explore digital models in capability building. In this new scenario, the leaders need to play a key role in propagating the importance of digital transformation. ”

Anindyo Naskar

Organization: Landmark Group, UAE

“ Technological advancements in corporate learning has enabled organizations to upskill and develop critical organizational capabilities, whilst allowing employees to have better control of careers. The role of the learning and development function in the future should focus on Strategic Business Objective, learning interventions that are personalized, learner centric and do all of this with an amazing Learner Experience. Moreover, it is imperative to ensure that learning interventions are well-aligned with the organization's strategy. In addition, by utilizing AI-driven learning platforms organizations can effectively personalize content, track learner analytics, drive innovative learner engagement programs while measuring ROI. Hence, L&D teams must be constantly up-to-date with latest technologies in organizational learning and performance improvement. ”

Joe Hayes

Organization: Etisalat, UAE

“ 2019 was the year we reinvented our approach to digital learning. Employees expected the same level of personalization, user experience, social features and AI benefits that they receive from social and tech brands online, all the time, and instantly. Our team embraced this trend and completely reimagined our Learning & Development strategy. Our mission was to democratize learning across Etisalat. In early 2020 Etisalat launched iQra, a learning experience platform (LXP) powered by EdCast. Since its inception, this platform has been a game-changer, even before the pandemic.

iQra has connected and strengthened lines of communication between the L&D department and the wider business. iQra's utility was instrumental for HR throughout the pandemic. The platform became the go-to resource for premium learning content, hosting the up-to-date information about COVID-19 and Etisalat's remote working policy. In addition, we hosted live webinars, leaders connected and learned with their regional teams while the world was in lockdown. The pandemic certainly accelerated employee engagement on the iQra app and website. In 2020, every performance metric in learning grew significantly against the year's challenging environment. Etisalat executive leadership and HR teams are committed to iQra's success. I am proud of the Learning & Development teams visions and timely implementation of the platform. I can't wait to see how our digital learning and EdTech strategy unfolds with EdCast. ”

Research Methodology

This report is based on a survey administered by EdCast and Protiviti Member Firm for the Middle East Region between November 2020 and April 2021. The methodology to design, administer and analyze the survey involved the following steps:



LHI FRAMEWORK

Primary research, external market research, and interviews with leading practitioners led to the development of this framework.

The framework quantitatively measures the learning health of an organization on eight distinct dimensions which are Learning Strategy & Business Planning, Impact & Measurement, L&D Policies & Processes, L&D Portfolio, Learner Experience, Learning Culture, Tools & Technologies, and L&D Competence.

Every organization was scored on a scale of 100 for each of the eight dimensions. The summation of the scores across these eight dimensions resulted in the overall Learning Health Index (LHI) of an organization, with 20 being the lowest and 100 being the highest Health Index.



QUESTIONNAIRE DESIGN

The Learning Health Framework was used as the basis for designing the survey questionnaire. The questionnaire comprised of 24 questions that quantitatively measured a certain dimension of the LHI along with other questions that captured technology trends, adoption in L&D and nationalization. A 5-point Likert scale was adopted to record the responses.



SURVEY ADMINISTRATION

51 leading organizations in the Middle East encompassing a variety of sectors such as Hospitality, Manufacturing, Professional Services, Consumer goods, BFSI, Retail, Telecommunications, Energy and Utilities, Healthcare, Conglomerate, etc. were identified using a set of predetermined criteria.



LEADERSHIP SPEAK SERIES

Questions based on the LHI Framework were shared with CHROs & CLOs of various leading organizations in the Middle East to solicit quotes from them that capture key learnings, current and future trends, best practices & insights pertaining to learning and development.



ANALYSIS & REPORTING

Responses obtained from CHROs/L&D Heads of identified organizations were checked for completeness and validity. In keeping with the research objectives, analysis of the survey responses was done using a variety of statistical models.

Acknowledgements

Sanjay Bhattacharya

Sanjay is the Managing Director of Human Capital Consulting Practice for Protiviti Member Firm for the Middle East Region. He has in-depth experience in Human Capital Consulting and has a successful track-record as a corporate human resources executive within Middle East, currently managing diverse portfolio of clients across oil & gas, retail, financial services, and family businesses. In recent years, Sanjay has led several digital HR transformation initiatives for clients. He helps organizations identify opportunities for HR transformation and implements solutions that impact employee experience and business performance.

Karthik A.T.

Karthik leads consulting projects specifically in the Middle East region, across a wide variety of Human Capital Consulting solutions, such as organization design, workforce analytics, organization performance, leadership development, talent management, and total rewards. He focuses on developing solutions around employee experience and digital transformation in HR.

Apar Agrawal

Apar is a Consultant in Human Capital Consulting practice with Protiviti Member Firm for the Middle East Region. He provides assistance and support for developing diverse solution offerings such as talent management, total rewards, policies and procedures, and organization design.

About Protiviti

Protiviti (www.protiviti.com) is a global consulting firm that delivers deep expertise, objective insights, a tailored approach, and unparalleled collaboration to help leaders confidently face the future. Protiviti and its independent and locally owned Member Firms provide clients with consulting and managed solutions in finance, technology, operations, data, analytics, governance, risk and internal audit through its network of more than 85 offices in over 25 countries.

Named to the 2021 Fortune 100 Best Companies to Work For® list, Protiviti has served more than 60 percent of Fortune 1000® and 35 percent of Fortune Global 500® companies. The firm also works with smaller, growing companies, including those looking to go public, as well as with government agencies. Protiviti is a wholly owned subsidiary of Robert Half (NYSE: RHI). Founded in 1948, Robert Half is a member of the S&P 500 index.

About EdCast

EdCast offers a unified talent experience platform designed to enable end-to-end employee journeys spanning learning, skilling and career mobility. Its award-winning platform is used internationally by organizations ranging from large Global 2000 companies to small businesses and governments. With EdCast's platforms, businesses are able to attract, develop and retain a high-performance and future-ready workforce. EdCast's offerings include its Talent Experience Platform, Spark for SMBs, EdCast Marketplace and MyGuide Digital Adoption Platform. EdCast is recognized as a Technology Pioneer by the World Economic Forum. Visit www.edcast.com.

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