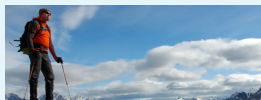


Resetting horizons
Human capital trends 2013



Resetting horizons: Global human capital trends 2013

Looking beyond continued uncertainty, the world's leading organizations are raising their sights, and pivoting from the great recession to the new horizons of 2020 with a focus on talent, globalization, growth, and innovation. This report introduces 13 global trends that are driving critical business and human capital decisions. The report provides information on these trends across global markets through results of a survey of over 1,300 business and HR professionals from 59 countries. www.deloitte.com/hctrends2013



Exploration

Leadership.next: Debunking the superhero myth

Yesterday's leadership theories are not keeping pace with the velocity of today's disruptive marketplace. Organizations are seeking a new model for the age of agility.

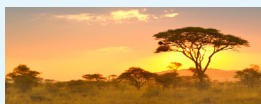
www.deloitte.com/leadershipnext



How boards are changing the HR game

To seize new opportunities for sustainable growth and manage heightened risks, boards of directors at high-performing organizations are pulling CHROs much deeper into business strategy—and far earlier in the process.

www.deloitte.com/boardschangingHR



Leading talent from the BRIC

In an era of pervasive globalization, organizations are building multi-directional talent networks that are not only geared toward existing markets, but can also power new emerging markets.

www.deloitte.com/leadingfromtheBRIC



A global diversity dividend

In the midst of ongoing global expansion and a worldwide shortage of critical talent, companies are stepping up efforts – at very different speeds and levels of investment – to recruit and retain a workforce diverse in both demographics and ideas.

www.deloitte.com/diversitydividend



Workplaces of the future: Creating an elastic workplace

Workplace flexibility has become table stakes for attracting and retaining employees. Now companies must align their flexibility strategy with their core strategy to realize the benefits.

www.deloitte.com/workplacesofthefuture



The open talent economy

Jump ahead to the year 2020. Half the people you rely on don't actually work for you and that's a good thing—if you're ready.

www.deloitte.com/opentalent



Execution

Organization acceleration

Faced with tougher, more numerous challenges, today's organizations are demanding more from their change initiatives by pursuing strategies that are customized, precise, and sustainable.

www.deloitte.com/orgaccelerationtrend



The war to develop talent

The talent management pendulum is swinging from recruitment to development.

www.deloitte.com/developtalent



Transforming HR to meet new business priorities

HR transformation efforts are continuing to shift their focus to business priorities, concentrating on areas such as talent, emerging markets, and the HR organization.

www.deloitte.com/transformingHR



Branding the workplace: Innovating the talent brand

Social media has erased whatever lines used to exist between the corporate brand and the talent brand. They're two sides of the same coin.

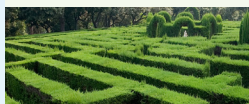
www.deloitte.com/talentbrand



The aging workforce: Finding the silver lining in the talent gap

Organizations can capitalize on shifting retirement patterns to help narrow their talent gap.

www.deloitte.com/agingworkforce



The performance management puzzle

Some say traditional ways of managing employee performance are irrelevant in today's fast-changing work environment. Others argue that these methods drive accountability and differentiated compensation. Both are right.

www.deloitte.com/performancepuzzle



Human capital analytics: Thinking like an economist

Increasingly, many HR leaders have to answer questions that have an economic issue at their core—the allocation of a scarce resource called talent.

www.deloitte.com/HCEconomist



I am pleased to share with you a summary of the market trends that are driving corporate leaders across Europe, Middle East and Africa (EMEA) in human capital decisions.

Through analysis, conversations with clients, interaction with experts and industry professionals, and extensive discussions with senior Deloitte Human Capital partners and practitioners around the world, we have identified the critical current and emerging trends shaping talent, HR and global business over the next few years.

This tailored report compares the EMEA results of our comprehensive survey - based on 412 EMEA respondents - to the overall results of more than 1,300 business leaders and HR Executives in 59 countries across the world's major economic regions.

Deloitte's global human capital survey categorized 13 global trends by level of intensity and maturity – from leading trends (those considered highly relevant over the next year) to rising trends (those considered relevant in the next 1-3 years) to emerging trends (those relevant in the next 3-5 years).

Some of the findings in this EMEA report are similar to those from respondents in other regions, while others are unique to us here in EMEA. We believe that both the EMEA report as well as the global survey report will inform your organization's leaders on the issues impacting companies throughout our country, our region and around the world.

Ardie van Berkel



Top leading, rising and emerging trends in EMEA

The challenge for any organization, on the most basic level, is having the right leadership and people with the right skillsets in the company when you need them. In practical terms, this means HR needs to be embedded in the business and anticipate what programs they need to execute against their business strategy and this will vary based on the business.

Regardless of business model however, there is a need to shift away from the basics of HR operations and employee relations in order to break the cycle of ineffective programs that lack focus on direct organizational benefits or solve business problems. Deloitte’s global human capital survey clearly identifies many of those issues, along with the leading trends that are currently shaping—or should be shaping the HR agenda.

To support your organization in crafting informed strategies to deal with human capital trends we have structured our report on trends leading today, rising in the near future and emerging to influence the next 3-5 years.

The survey results of EMEA clearly identified five leading trends that are currently shaping – or should be shaping – talent and HR strategies and programs. The trends that emerged as most highly relevant today include:

- The war to develop talent
- Transforming HR to meet new business priorities
- How boards are changing the HR game
- Organization Acceleration
- Leadership.next

Besides a difference in order of rank, the focus of EMEA and global are almost identical.

Human Capital Trends Summary

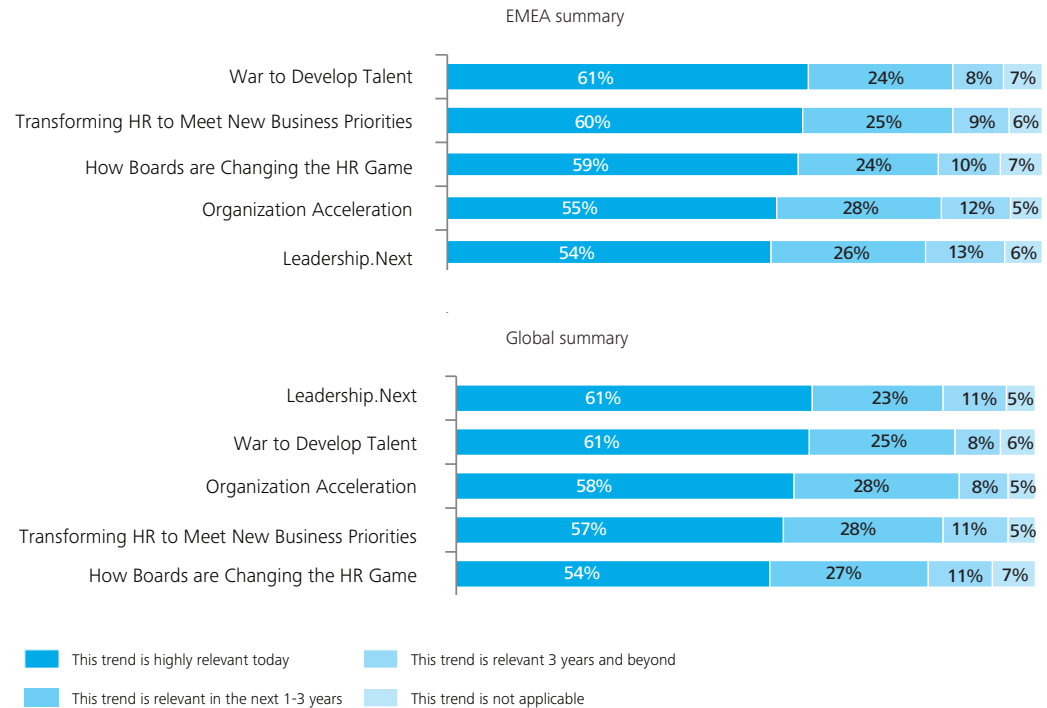


Table 1. Top five trends EMEA and global

General business outlook in 2013

Many executives who participated in Deloitte’s global survey appear to recognize 2013 as a pivot point in terms of economic expectations, with recession fears fading and optimism growing. According to global respondents, more than half of global executives believe their company will enjoy either moderate (39%) or strong (12%) growth in 2013. The prospects of EMEA are less than robust. In total, one third of EMEA executives forecast moderate (23%) or strong (7%) growth this year, compared to about half of the global executives.

General business outlook in 2013 compared to 2012

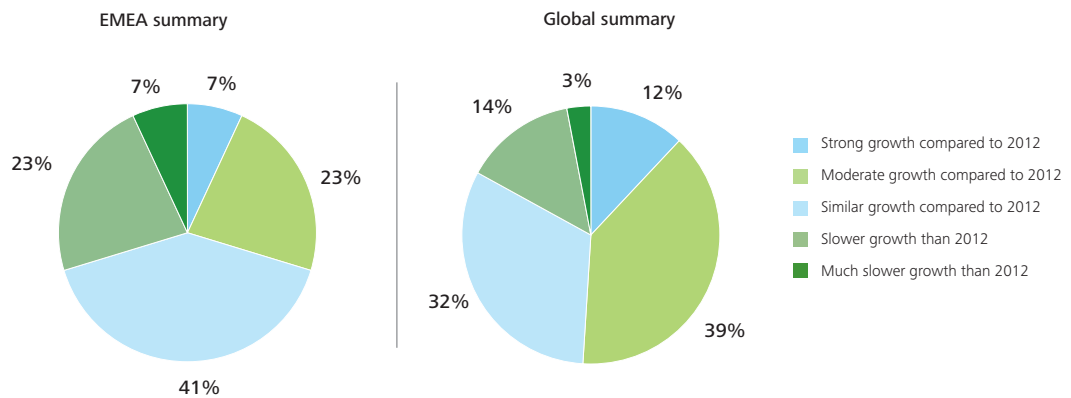


Table 2. Prospects EMEA and global

Despite generally favorable expectations for growth, results on the strength of talent programs are more sobering. Only a few of the global respondents (3% of global, 4% of EMEA) believe that their HR programs are truly exceptional. Nearly four out of ten (38% of global and of EMEA) respondents rate the strength of HR and talent programs as “adequate”. This reflects a renewed desire to strengthen corporate talent development. About one in five executives (21% of global, 23% of EMEA) believes that their programs are “world class” in some areas. Business leaders (23% of global, 24% of EMEA) surveyed say their HR and talent programs require “significant improvements”. According to the business leaders (14% of global, 11% of EMEA), organizations are underperforming in HR and talent programs and radical improvements are needed. Based on the results we can conclude that perspective of global and EMEA business leaders on current HR and talent programs are almost identical.

Capabilities of Organization’s HR and talent programs

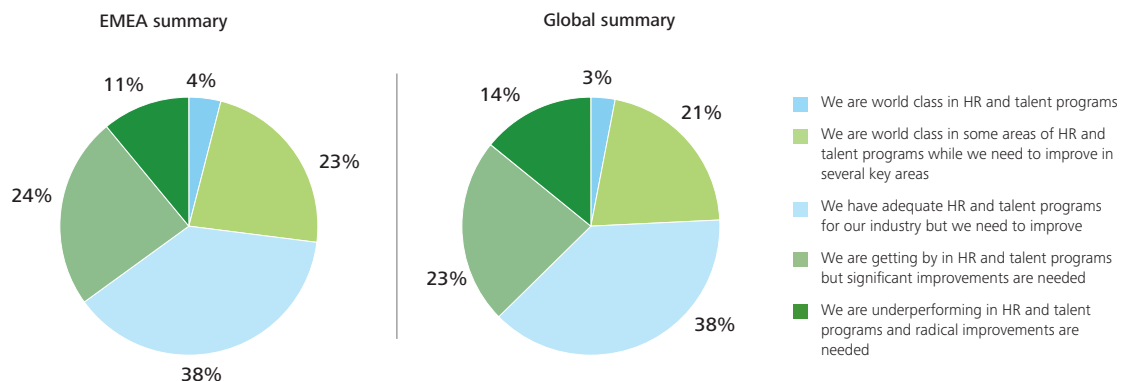


Table 3. Ranking of HR and talent programs EMEA versus global

Top three pressing HR and talent concerns

When executives were asked about the most pressing talent and HR concerns facing them today, the top three turned out to be identical for global as well as EMEA respondents. EMEA executives are almost equally concerned about “Developing leaders and succession planning” (49%) and “sustaining employee engagement” (46%). Global executives are even more concerned about leadership development than their EMEA counterparts; more than half of the executives (55%) reported that “developing leaders and succession planning” is their top concern.

One of the pressing concerns is sustaining employee engagement/morale which could indicate the high priority of first leading trend of EMEA, “the war to develop talent”. In addition, connecting HR and talent with business critical priorities is a concern which is linked to a leading trend called “transforming HR to meet new business priorities”.

Ranking	EMEA	Global
#1	Developing leaders and succession planning (49%)	Developing leaders and succession planning (55%)
#2	Sustaining employee engagement/morale (46%)	Sustaining employee engagement/morale (39%)
#3	Connecting HR and talent with business critical priorities (35%)	Connecting HR and talent with business critical priorities (33%)

(% indicated the % of total respondents have rated the concern 1,2, or 3)

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About the report

This report, focusing specifically on human capital trends in EMEA, was designed to complement Deloitte's 2013 global human capital trends report *Resetting horizons: Global human capital trends 2013*. That report was based on a comprehensive global survey of more than 1,300 business leaders and HR executives in 59 countries. This report compares regional results—based on 412 EMEA respondents—to overall global results.



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