Global Human Capital Trends 2016
The new organization: Different by design
Deloitte’s Human Capital professionals leverage research, analytics, and industry insights to help design and execute the HR, talent, leadership, organization, and change programs that enable business performance through people performance. Visit the “Human Capital” area of www.deloitte.com to learn more.
This year’s 10 trends

This fourth annual survey of more than 7,000 HR and business leaders globally ranks 10 key trends and companies’ readiness to respond to them. The report also includes both country and industry analyses, as well as an interactive dashboard and mobile app to explore the survey results.

Four powerful forces are driving change for both HR functions and the organizations they serve, creating talent challenges—as well as potential solutions—radically different from those faced by previous generations of leaders.

Organizational design: The rise of teams
Hierarchical organizational models aren’t just being turned upside down — they’re being deconstructed from the inside out. Businesses are reinventing themselves to operate as networks of teams to keep pace with the challenges of a fluid, unpredictable world.

Leadership awakened: Generations, teams, science
Leaders of all ages, genders, and cultures are now poised to take the reins at organizations around the world. How ready will these future business leaders be to take charge in an increasingly complex global marketplace?

Shape culture: Drive strategy
The impact of culture on business is hard to overstate: 82 percent of respondents to the 2016 Global Human Capital Trends survey believe that culture is a potential competitive advantage. Today, new tools can help leaders measure and manage culture towards alignment with business goals.

Engagement: Always on
Employee engagement and retention today means understanding an empowered workforce’s desire for flexibility, creativity, and purpose. Under the evolving social contract between employer and employee, workers become “volunteers” to be reengaged and re-recruited each day.

Learning: Employees take charge
Corporate learning departments are changing from education providers to content curators and experience facilitators, developing innovative platforms that turn employee learning and development into a self-driven pursuit.

Design thinking: Crafting the employee experience
Design thinking takes aim at the heart of unnecessary workplace complexity by putting the employee experience first — helping to improve productivity by designing solutions that are at once compelling, enjoyable, and simple.

HR: Growing momentum toward a new mandate
Good news: This year’s Global Human Capital Trends survey shows an improvement in the HR organization’s skills, business alignment, and ability to innovate. But as companies change the way they are organized, they must embrace the changing role of HR as well.

People analytics: Gaining speed
The use of analytics in HR is growing, with organizations aggressively building people analytics teams, buying analytics offerings, and developing analytics solutions. HR now has the chance to demonstrate ROI on its analytics efforts, helping to make the case for further investment.

Digital HR: Revolution, not evolution
A new world for HR technology and design teams is on the horizon. Mobile and other technologies could allow HR leaders to revolutionize the employee experience through new digital platforms, apps, and ways of delivering HR services.

The gig economy: Distraction or disruption?
How can a business manage talent effectively when many, or even most, of its people are not actually its employees? Networks of people who work without any formal employment agreement — as well as the growing use of machines as talent — are reshaping the talent management equation.

Learn more
www.deloitte.com/us/hctrends
@DeloitteTalent
Introduction
Sweeping global forces are reshaping the workplace, the workforce, and work itself. To help organizations and their leaders understand these changes, Deloitte presents the 2016 *Global Human Capital Trends* report, based on more than 7,000 responses to our survey in over 130 countries around the world.

The theme of this year’s report—“The new organization: Different by design”—reflects a major finding: After three years of struggling to drive employee engagement and retention, improve leadership, and build a meaningful culture, executives see a need to redesign the organization itself, with 92 percent of survey participants rating this as a critical priority. The “new organization,” as we call it, is built around highly empowered teams, driven by a new model of management, and led by a breed of younger, more globally diverse leaders.

To lead this shift toward the new organization, CEOs and HR leaders are focused on understanding and creating a shared culture, designing a work environment that engages people, and constructing a new model of leadership and career development. In competition for skilled people, organizations are vying for top talent in a highly transparent job market and becoming laser-focused on their external employment brand. Executives are embracing digital technologies to reinvent the workplace, focusing on diversity and inclusion as a business strategy, and realizing that, without a strong learning culture, they will not succeed.

Amidst these changes, the HR function is taking on a new role as the steward and designer of these new people processes. The mission of the HR leader is evolving from that of “chief talent executive” to “chief employee experience officer.” HR is being asked to simplify its processes, help employees manage the flood of information at work, and build a culture of collaboration, empowerment, and innovation. This means that HR is redesigning almost everything it does—from recruiting to performance management to onboarding to rewards systems. To do this, our research suggests that HR must upgrade its skills to include the areas of design thinking, people analytics, and behavioral economics.

After three years of struggling to drive employee engagement and retention, improve leadership, and build a meaningful culture, executives see a need to redesign the organization.
The forces of global change

What are the forces driving this demand to reorganize and redesign institutions around the world? We see a series of drivers coming together to create disruptive change in the talent landscape:

First, demographic upheavals have made the workforce both younger and older, as well as more diverse. Millennials now make up more than half the workforce, and they bring high expectations for a rewarding, purposeful work experience, constant learning and development opportunities, and dynamic career progression. At the same time, Baby Boomers working into their 70s and 80s are being challenged to adapt to new roles as mentors, coaches, and often subordinates to junior colleagues. Also, the global nature of business has made the workforce more diverse, demanding a focus on inclusion and shared beliefs to tie people together.

Second, digital technology is now everywhere, disrupting business models and radically changing the workplace and the way work is done. Technologies such as mobile devices, 3D printing, sensors, cognitive computing, and the Internet of Things are changing the way companies design, manufacture, and deliver almost every product and service, while digital disruption and social networking have changed the way organizations hire, manage, and support people. Innovative companies are figuring out how to simplify and improve the work experience by applying the disciplines of design thinking and behavioral economics, embracing a new approach that we call “digital HR.”

Third, the rate of change has accelerated. Fifty years of operating under Moore’s Law—the axiom that computing power doubles every two years—have not only propelled technology innovation forward but also significantly increased the pace of change in business as a whole, requiring organizations to be more agile. Rapid business-model innovation from companies such as Uber and Airbnb is forcing organizations to respond and reposition themselves quickly to meet new challenges. In our highly connected, fast-changing world, “black swan” events (those of low probability and high impact) also seem to be more significant, reinforcing the need for agility.

Fourth, a new social contract is developing between companies and workers, driving major changes in the employer-employee relationship. The days when a majority of workers could expect to spend a career moving up the ladder at one company are over. Young people anticipate working for many employers and demand an enriching experience at every stage. This leads to expectations for rapid career growth, a compelling and flexible workplace, and a sense of mission and purpose at work. Today, contingent, contract, and part-time workers make up almost one-third of the workforce, yet many companies lack the HR practices, culture, or leadership support to manage this new workforce.

We see a series of drivers coming together to create disruptive change in the talent landscape.

Our global research

Now in its fourth year, Deloitte’s 2016 Global Human Capital Trends report is one of the largest longitudinal studies of talent, leadership, and HR challenges and readiness around the world. The research described in this report involved surveys and interviews with more than 7,000 business and HR leaders from 130 countries. (See the appendix to this chapter for details on survey demographics.)
The survey asked business and HR respondents to assess the importance of specific talent challenges facing their organization.

**The top 10 human capital trends for 2016**

In 2016, organizational design rocketed to the top of the agenda among senior executives and HR leaders worldwide, with 92 percent rating it a key priority. Perennial issues such as leadership, learning, and HR skills continue to rank high in importance, as they have in each of the four years of this annual study. Yet this year, a key shift is under way, as corporate leaders turn a more focused eye toward adapting their organization’s design to compete successfully in today’s highly challenging business environment and competitive talent market.

Culture and engagement are also a major concern for the C-suite. This reflects, in part, the rise of social networking tools and apps that leave companies more transparent than ever, whether they like it or not. Top executives increasingly recognize the need for a conscious strategy to shape their corporate culture, rather than having it defined for them through Glassdoor or Facebook.

Figure 2 presents this year’s trends ranked in order of their importance as rated by survey respondents.
Organizational design: The rise of teams

As companies strive to become more agile and customer-focused, organizations are shifting their structures from traditional, functional models toward interconnected, flexible teams. More than nine out of ten executives surveyed (92 percent) rate organizational design as a top priority, and nearly half (45 percent) report their companies are either in the middle of a restructuring (39 percent) or planning one (6 percent).

A new organizational model is on the rise: a “network of teams” in which companies build and empower teams to work on specific business projects and challenges. These networks are aligned and coordinated with operations and information centers similar to command centers in the military. Indeed, in some ways, businesses are becoming more like Hollywood movie production teams and less like traditional corporations, with people coming together to tackle projects, then disbanding and moving on to new assignments once the project is complete.

This new structure has sweeping implications, forcing programs such as leadership development, performance management,
learning, and career progression to adapt. Challenges still remain: Only 14 percent of executives believe their companies are ready to effectively redesign their organizations; just 21 percent feel expert at building cross-functional teams, and only 12 percent understand the way their people work together in networks.

**Leadership awakened:**
**Generations, teams, science**

Fully 89 percent of executives in this year’s survey rated the need to strengthen, reengineer, and improve organizational leadership as an important priority. The traditional pyramid-shaped leadership development model is simply not producing leaders fast enough to keep up with the demands of business and the pace of change.

More than half of surveyed executives (56 percent) report their companies are not ready to meet leadership needs. Only 7 percent state that their companies have accelerated leadership programs for Millennials, although 44 percent report making progress—a jump from 33 percent last year. While investment in leadership development has grown by 10 percent since 2015, progress has been uneven. In fact, more than one in five companies (21 percent) have no leadership programs at all.²

Our findings suggest that organizations need to raise the bar in terms of rigor, evidence, and more structured and scientific approaches to identifying, assessing, and developing leaders, and that this process needs to start earlier in leaders’ careers. This is likely to also involve teaching senior leaders to take on new roles to make way for younger leaders.

**Shape culture: Drive strategy**

Last year, “culture and engagement” ranked as the most important issue overall. This year, we asked executives about culture

---

**Figure 3. The relationship between culture and engagement**

<table>
<thead>
<tr>
<th>Culture: The way things work around here</th>
<th>Engagement: The way people feel about the way things work around here</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trusted leadership</td>
<td>Hands-on management</td>
</tr>
<tr>
<td>Hands-on management</td>
<td>Meaningful work</td>
</tr>
<tr>
<td>Risk and governance</td>
<td>Mission and purpose</td>
</tr>
<tr>
<td>Courage</td>
<td>Clear goals</td>
</tr>
<tr>
<td>Innovation</td>
<td>Recognition</td>
</tr>
<tr>
<td>The work environment</td>
<td>Development and career</td>
</tr>
</tbody>
</table>

Graphic: Deloitte University Press  | DUPress.com
and engagement separately—and both placed near the top of the importance list, with 86 percent citing culture as an important or very important issue.

Why the separate rankings? Both are critical human capital issues today, and each requires a CEO-level commitment and strong support from HR if they are to be understood, measured, and improved. However, they are different concepts and need a different focus and set of solutions. Culture describes “the way things work around here,” while engagement describes “how people feel about the way things work around here.”

That said, culture and engagement are also linked. When a company’s culture is aligned with its values, it attracts those who feel comfortable in that culture, which in turn helps companies to motivate people, leading to a high level of engagement (see figure 3).

In this year’s survey, the percentage of executives who believe their companies are driving the “right culture” rose from 10 percent to 12 percent—a small sign of progress. Yet fewer than one in three executives (28 percent) report that they understand their organization’s culture.

Engagement: Always on

Employee engagement is a headline issue throughout business and HR. An overwhelming majority of executives in this year’s survey (85 percent) ranked engagement as a top priority (that is, important or very important).

Building a compelling and meaningful work environment is a complex process. At the same time, the world of employee engagement and feedback is exploding. Annual engagement surveys are being replaced by “employee listening” tools such as pulse surveys, anonymous social tools, and regular feedback check-ins by managers. All these new approaches and tools have given rise to the “employee listening” officer, an important new role for HR.

In terms of readiness, companies are making progress. The percentage of executives who believe their organizations are “very ready” to deal with engagement issues increased from 10 percent in 2015 to 12 percent in 2016, while those who feel they are “fully ready” rose from 31 percent to 34 percent. These are hopeful signs, but even with this increase, only 46 percent of companies report that they are prepared to tackle the engagement challenge.

Learning: Employees take charge

This year, 84 percent of executives rated learning as important or very important. This focus on learning seems appropriate, as learning opportunities are among the largest drivers of employee engagement and strong workplace culture—they are part of the entire employee value proposition, not merely a way to build skills.

Compared to last year, companies appear to be making strides in adopting new technologies and embracing new learning models. The percentage of companies that feel comfortable incorporating massive open online courses (MOOCs) into their learning platforms rose to 43 percent from 30 percent last year, while the percentage who said the same about advanced video tripled from 5 percent to 15 percent.

These gains signal increasing recognition among executives and HR leaders that learning
must adapt to a world where employees demand continuous learning opportunities through innovative platforms tailored to their individual schedules. A new type of employee learning is emerging that is more “consumer-like” and that brings together design thinking, content curation, and an integrated model offering an end-to-end designed learning experience. However, companies still face tremendous challenges in realizing this vision. Even as spending on learning rose 10 percent last year (to over $140 billion), only 37 percent of companies believe their programs are effective, and only 30 percent believe corporate learning is the center of learning today.

**Design thinking: Crafting the employee experience**

Design thinking is emerging as a major new trend in HR. *Global Human Capital Trends* highlighted the first inklings of this issue two years ago when we identified the “overwhelmed employee” as a significant talent concern, with employees struggling to deal with a flood of emails and information, grappling with demanding work assignments and being on 24/7. Last year’s *Global Human Capital Trends* report identified HR’s attempts to “simplify” the work environment as a response to the overwhelmed employee situation.

Now, innovative HR organizations are taking their efforts a step further by incorporating design thinking into their approach to managing, supporting, and training people. Instead of building “programs” and “processes,” leading HR organizations are studying people to help develop interventions, apps, and tools that help make employees less stressed and more productive. In this year’s survey, 79 percent of executives rank design thinking as a high priority when it comes to meeting talent challenges. While only 12 percent of respondents overall believe that design thinking is prevalent in their current talent programs, 50 percent of those executives who rate their talent programs as excellent state that they apply design thinking well, and self-identified high-performing companies are three to four times more likely than their competitors to be applying design thinking to their people practices. Clearly, design thinking is emerging as a best practice for leading companies and innovative HR organizations.

**HR: Growing momentum toward a new mandate**

Many HR organizations appear to be “getting it” when it comes to upgrading the skills, capabilities, and experience of their teams. Compared to last year, the percentage of executives who rank HR skills as a top priority fell slightly. More than two-thirds of executives in this year’s survey (68 percent) report their companies have solid development programs for HR professionals, and 60 percent believe they are holding HR accountable for talent and business results—both a higher proportion than a year ago.

Best of all, HR organizations’ scorecard shows a marked and steady improvement. Four out of ten executives report their companies are ready to address the skills gaps in HR—an increase of 30 percent over 2015. And the percentage of executives who rate their HR organizations as “good or excellent” in delivering business-relevant talent solutions increased as well.

For the first time in the four years of the *Global Human Capital Trends* report, there are...
real signs of change and progress: HR teams are learning to experiment with new ideas; they are making significant steps to upgrade skills; and a new generation of younger, more business-savvy and technology-empowered people is entering the profession.

People analytics: Gaining speed

As technology makes data-driven HR decision making a possibility, 77 percent of executives now rate people analytics as a key priority, up slightly from last year. In response, companies are building people analytics teams, rapidly replacing legacy systems, and combining separate analytics groups within HR into one strategic function. In 2016, 51 percent of companies are now correlating business impact to HR programs, up from 38 percent in 2015. Forty-four percent are now using workforce data to predict business performance, up from 29 percent last year.

One of the biggest new trends in people analytics is also starting to accelerate: leveraging external data—such as data from social networking platforms, employment brand data, data on hiring patterns, and external turnover and demographic data—to predict workforce trends and target top talent. Today, 29 percent of companies believe they are performing well in this area, and 8 percent rate themselves excellent.

A variety of new tools and data sources have entered this domain. Employee feedback and engagement systems, real-time narrative analysis, and off-the-shelf predictive models from almost every talent management vendor are now available.

Companies are entering a “golden age” of people analytics—and progress could accelerate.

Digital HR: Revolution, not evolution

The all-digital world is changing how we live and work, creating two major challenges. First, how will HR help business leaders and employees shift to a “digital mind-set”—a digital way of managing, organizing, and leading change? Second, how will HR itself revolutionize HR processes, systems, and organizations to adopt new digital platforms, apps, and ways of delivering HR services?

This year’s chapter on digital HR focuses on the second part of the challenge: how to reimagine HR and the employee experience in a digital world. Innovative HR organizations are integrating mobile and cloud technologies to build an app-based set of services designed to incorporate HR programs into an employee’s daily life. More than simply replacing old HR systems, digital HR means creating an entire platform of services built around ease of use. By bringing together design thinking and mobile technology, companies can now develop their own custom apps to make work easier, more productive, and more enjoyable.

This year, 74 percent of executives identified digital HR as a top priority, and it will likely be a major focus in 2016. The trend is moving rapidly: 42 percent of companies are adapting their existing HR systems for mobile, device-delivered, just-in-time learning; 59 percent are developing mobile apps that integrate back-office systems for ease of use by employees; and 51 percent are leveraging external social networks in their own internal apps for recruitment and employee profile management.
The gig economy: Distraction or disruption?

When it comes to meeting heightened talent needs, top HR organizations must increasingly learn to integrate and leverage the part-time and contingent workforce. More than seven out of ten executives and HR leaders (71 percent) ranked the trend as important or very important.

Operating effectively in the gig economy poses a number of questions. How can companies best use and schedule external staff to improve the productivity of their own workers and increase profitability? How can companies leverage contingent workers to access some of the most talented and highly skilled people in the workforce?

Many companies are struggling with the challenge. Only 19 percent of executives surveyed believe their companies fully understand the labor laws that govern contingent workers, and only 11 percent have complete management processes for the contingent part of the workforce. This suggests that companies need to take a more deliberate approach as the size and scope of the contingent workforce continues to grow in the coming years. Workforce management will also have to address the tremendous growth in cognitive computing and other smart technologies that are likely to eliminate jobs, create new jobs, change the nature of work, and disrupt the workforce.

A year of change and disruption

Taken together, the 2016 Global Human Capital Trends report sketches out a vast and varied series of changes and challenges. As the pace of change accelerates, business and HR leaders who move aggressively to address these trends will likely gain an advantage over their competitors and find themselves on the winning side in the global competition for talent.
Selected data from this year’s survey can be viewed by geography, company size, and industry using an interactive tool, the Human Capital Trends Dashboard. This tool, available at http://www.deloitte.com/hcdashboard, lets you explore the data visually to see how talent priorities vary around the world.

This year’s survey results showed remarkable consistency across geographies.

Figure 4. Importance of challenges in different regions

<table>
<thead>
<tr>
<th>Region</th>
<th>AMERICAS</th>
<th>EUROPE, MIDDLE EAST, &amp; AFRICA</th>
<th>ASIA PACIFIC</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>North America</td>
<td>Latin &amp; South America</td>
<td>Nordic countries</td>
</tr>
<tr>
<td>Organizational design</td>
<td>90</td>
<td>92</td>
<td>87</td>
</tr>
<tr>
<td>Leadership</td>
<td>87</td>
<td>89</td>
<td>89</td>
</tr>
<tr>
<td>Culture</td>
<td>87</td>
<td>86</td>
<td>87</td>
</tr>
<tr>
<td>Engagement</td>
<td>86</td>
<td>85</td>
<td>79</td>
</tr>
<tr>
<td>Learning</td>
<td>79</td>
<td>87</td>
<td>75</td>
</tr>
<tr>
<td>Design thinking</td>
<td>70</td>
<td>80</td>
<td>71</td>
</tr>
<tr>
<td>Changing skills of the HR organization</td>
<td>73</td>
<td>78</td>
<td>67</td>
</tr>
<tr>
<td>People analytics</td>
<td>78</td>
<td>77</td>
<td>76</td>
</tr>
<tr>
<td>Digital HR</td>
<td>69</td>
<td>71</td>
<td>74</td>
</tr>
<tr>
<td>Workforce management</td>
<td>67</td>
<td>74</td>
<td>63</td>
</tr>
</tbody>
</table>

Higher percentages: Lower percentages

Note: Figures represent the percentage of respondents who rated each issue “important” or “very important.”
As with global regions, survey results were also similar across different industries, suggesting broad agreement on key trend priorities.

### Figure 5. Importance of challenges in different industries

<table>
<thead>
<tr>
<th>Industry</th>
<th>Consumer business</th>
<th>Energy &amp; resources</th>
<th>Financial services</th>
<th>Life sciences &amp; health care</th>
<th>Manufacturing</th>
<th>Professional services</th>
<th>Public sector</th>
<th>Technology, media, &amp; telecommunications</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organizational design</td>
<td>93</td>
<td>92</td>
<td>93</td>
<td>92</td>
<td>94</td>
<td>91</td>
<td>87</td>
<td>92</td>
</tr>
<tr>
<td>Leadership</td>
<td>88</td>
<td>86</td>
<td>91</td>
<td>89</td>
<td>92</td>
<td>90</td>
<td>85</td>
<td>88</td>
</tr>
<tr>
<td>Culture</td>
<td>89</td>
<td>83</td>
<td>89</td>
<td>88</td>
<td>86</td>
<td>86</td>
<td>80</td>
<td>85</td>
</tr>
<tr>
<td>Engagement</td>
<td>86</td>
<td>82</td>
<td>87</td>
<td>87</td>
<td>88</td>
<td>85</td>
<td>83</td>
<td>85</td>
</tr>
<tr>
<td>Learning</td>
<td>83</td>
<td>81</td>
<td>86</td>
<td>84</td>
<td>83</td>
<td>86</td>
<td>83</td>
<td>83</td>
</tr>
<tr>
<td>Design thinking</td>
<td>77</td>
<td>75</td>
<td>81</td>
<td>79</td>
<td>79</td>
<td>82</td>
<td>74</td>
<td>83</td>
</tr>
<tr>
<td>Changing skills of the HR organization</td>
<td>81</td>
<td>79</td>
<td>81</td>
<td>83</td>
<td>80</td>
<td>71</td>
<td>74</td>
<td>76</td>
</tr>
<tr>
<td>People analytics</td>
<td>79</td>
<td>77</td>
<td>80</td>
<td>80</td>
<td>76</td>
<td>74</td>
<td>73</td>
<td>78</td>
</tr>
<tr>
<td>Digital HR</td>
<td>73</td>
<td>72</td>
<td>76</td>
<td>75</td>
<td>68</td>
<td>72</td>
<td>73</td>
<td>78</td>
</tr>
<tr>
<td>Workforce management</td>
<td>69</td>
<td>73</td>
<td>65</td>
<td>68</td>
<td>73</td>
<td>71</td>
<td>74</td>
<td>69</td>
</tr>
</tbody>
</table>

Higher percentages | Lower percentages

Note: Figures represent the percentage of respondents who rated each issue “important” or “very important.”
Figure 6. Survey demographics
Our survey includes data from 7,096 business and HR leaders.

<table>
<thead>
<tr>
<th>Region</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Latin &amp; South America</td>
<td>23%</td>
</tr>
<tr>
<td>Western Europe</td>
<td>23%</td>
</tr>
<tr>
<td>Asia</td>
<td>14%</td>
</tr>
<tr>
<td>Africa</td>
<td>12%</td>
</tr>
<tr>
<td>North America</td>
<td>12%</td>
</tr>
<tr>
<td>Central &amp; Eastern Europe</td>
<td>5%</td>
</tr>
<tr>
<td>Nordic countries</td>
<td>4%</td>
</tr>
<tr>
<td>Southeast Asia</td>
<td>3%</td>
</tr>
<tr>
<td>Middle East</td>
<td>2%</td>
</tr>
<tr>
<td>Oceania</td>
<td>2%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Country</th>
<th>Respondent Job Function</th>
<th>Respondent Level</th>
<th>Organization Size</th>
<th>Industry</th>
</tr>
</thead>
<tbody>
<tr>
<td>United States</td>
<td>661</td>
<td>78</td>
<td>23% Large (10,001+)</td>
<td>Professional services, 15%</td>
</tr>
<tr>
<td>China</td>
<td>560</td>
<td>71</td>
<td>23% Medium (1,001 to 10,000)</td>
<td>Financial services, 15%</td>
</tr>
<tr>
<td>Brazil</td>
<td>378</td>
<td>68</td>
<td>14% Small (1 to 1,000)</td>
<td>Consumer sector, 13%</td>
</tr>
<tr>
<td>Mexico</td>
<td>243</td>
<td>60</td>
<td>12% C-suite, 28%</td>
<td>Technology, media, and telecommunications, 11%</td>
</tr>
<tr>
<td>India</td>
<td>239</td>
<td>60</td>
<td>12% Individual contributor, 21%</td>
<td>Other, 14%</td>
</tr>
<tr>
<td>Belgium</td>
<td>230</td>
<td>59</td>
<td>3% Energy and resources, 8%</td>
<td>Public sector, 8%</td>
</tr>
<tr>
<td>France</td>
<td>229</td>
<td>59</td>
<td>3% Life sciences and health care, 5%</td>
<td>Manufacturing, 12%</td>
</tr>
<tr>
<td>Costa Rica</td>
<td>215</td>
<td>59</td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>South Africa</td>
<td>213</td>
<td>58</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Germany</td>
<td>209</td>
<td>55</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spain</td>
<td>203</td>
<td>54</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Canada</td>
<td>196</td>
<td>53</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kenya</td>
<td>163</td>
<td>53</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Japan</td>
<td>150</td>
<td>51</td>
<td></td>
<td></td>
</tr>
<tr>
<td>United Kingdom</td>
<td>140</td>
<td>50</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ireland</td>
<td>135</td>
<td>47</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Colombia</td>
<td>131</td>
<td>44</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Austria</td>
<td>123</td>
<td>42</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Australia</td>
<td>114</td>
<td>42</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Norway</td>
<td>111</td>
<td>40</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Switzerland</td>
<td>102</td>
<td>38</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Uruguay</td>
<td>102</td>
<td>38</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chile</td>
<td>90</td>
<td>37</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Luxembourg</td>
<td>87</td>
<td>37</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Finland</td>
<td>86</td>
<td>35</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ivory Coast</td>
<td>86</td>
<td>35</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Greece</td>
<td>79</td>
<td>34</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tunisia</td>
<td>79</td>
<td>34</td>
<td></td>
<td></td>
</tr>
<tr>
<td>All other countries</td>
<td>385</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Figures may not total 100 percent due to rounding.
Source: Data from Human Capital Trends 2016 survey.


5. Ibid.
Authors

Josh Bersin, Bersin by Deloitte, Deloitte Consulting LLP | jbersin@deloitte.com

Josh Bersin founded Bersin & Associates, now Bersin by Deloitte, in 2001 to provide research and advisory services focused on corporate learning. He is a frequent speaker at industry events and a popular blogger. Bersin spent 25 years in product development, product management, marketing, and sales of e-learning and other enterprise technologies. His education includes a BS in engineering from Cornell, an MS in engineering from Stanford, and an MBA from the Haas School of Business at the University of California, Berkeley.

Jason Geller, Deloitte Consulting LLP | jgeller@deloitte.com

Jason Geller is the national managing director for Deloitte Consulting LLP’s Human Capital consulting practice in the United States. In this role, he is responsible for overall strategy, financial performance and operations, talent recruitment and development, and service delivery. He is a member of the global Human Capital executive committee and the US Deloitte Consulting management committee, and has also served as a US Deloitte Consulting board member, Deloitte India board member, global and US leader for HR Transformation, and US Human Capital chief strategy officer. Geller advises organizations on their HR and talent transformations.

Nicky Wakefield, Deloitte Consulting Pte Ltd | nwakefield@deloitte.com

Nicky Wakefield is a partner and the leader of the Southeast Asia Human Capital consulting practice. With over 20 years of business consulting experience with clients across the globe, she is recognized as one of the leading strategic thinkers on complex organizational change and is admired by her clients as a practical, hands-on advisor and implementer. Wakefield has spent her career focused on the execution of business strategy and helping organizations make it real for their people.

Brett Walsh, Deloitte MCS Limited | bcwalsh@deloitte.co.uk

Brett Walsh leads Deloitte’s global Human Capital practice and also serves as the HR Transformation practice leader for Deloitte UK. As a Deloitte UK partner, he consults with executives around the world on HR strategy, merger integration, and major transformation and technology programs, including back-office shared services and outsourcing. His particular expertise is in HR and change management. Walsh has an MBA from Warwick University and is a fellow of the Institute of Business Consultants.
Executive editors

Bill Pelster
Deloitte Consulting LLP
bpelster@deloitte.com

Bill Pelster has more than 20 years of industry and consulting experience. In his current role, he is responsible for leading the Integrated Talent Management practice, which focuses on issues and trends in the workplace. In his previous role as Deloitte’s chief learning officer, Pelster was responsible for the total development experience of Deloitte professionals, including learning, leadership, high-potentials, and career, life fit. Additionally, he was one of the key architects of Deloitte University and a US Consulting board member.

Jeff Schwartz
Deloitte Consulting LLP
jeffschwartz@deloitte.com

A principal with Deloitte Consulting LLP, Jeff Schwartz is the global leader for Human Capital Talent Strategies and Marketing, Eminence, and Brand. A senior advisor to global companies, his recent research focuses on talent in global and emerging markets. He is a frequent speaker and writer on issues at the nexus of talent, human resources, and global business challenges.
Bersin by Deloitte research team

David Mallon, vice president, head of research, Bersin by Deloitte, Deloitte Consulting LLP

David Mallon leads the Bersin by Deloitte research team. He has been the primary force behind much of Bersin by Deloitte’s past work in learning and development, which has covered topics including continuous learning, learning cultures, and high-impact learning organization maturity. He is also a key contributor to Bersin by Deloitte’s thought leadership related to HR’s operating model, governance, and the evolution of key roles such as the HR business partner. Mallon holds a BA in English literature from Emory University and an MS in digital media from the Georgia Institute of Technology.

Sarah Andresen, vice president, benchmarking research and data products, Bersin by Deloitte, Deloitte Consulting LLP

Sarah Andresen leads benchmarking research and the development of online tools, diagnostics, and assessments that serve the corporate membership programs at Bersin by Deloitte. Andresen has a broad background in product management, sales, marketing, research, and economics. She holds a master’s degree in economics from the University of California, Santa Barbara, and bachelor’s degrees in history and economics from California Polytechnic State University—San Luis Obispo.

Robin Erickson, vice president, engagement, retention, and acquisition research, Bersin by Deloitte, Deloitte Consulting LLP

Robin Erickson, PhD, directs Bersin by Deloitte’s talent acquisition, engagement, and retention research practice, where she draws on her deep experience in talent strategies consulting and related research for Deloitte’s Human Capital practice. Erickson holds a doctorate from Northwestern University in organizational communication and change, a master’s degree in communication from Northwestern University, a master’s degree in theology from Northern Seminary, and a bachelor of arts degree from the University of Chicago.

Stacia Sherman Garr, vice president, talent management research, Bersin by Deloitte, Deloitte Consulting LLP

Stacia Sherman Garr leads Bersin by Deloitte’s talent and HR research practices. She is responsible for Bersin by Deloitte’s research on human resources, talent strategy, integrated talent management, performance management, career management, diversity and inclusion, employee recognition, competencies, and workforce planning. Garr holds an MBA from the University of California, Berkeley, a master’s degree from the London School of Economics, and bachelor’s degrees in history and political science from Randolph-Macon Woman’s College.

Dani Johnson, vice president, learning and development research, Bersin by Deloitte, Deloitte Consulting LLP

Dani Johnson is vice president of learning and development research at Bersin by Deloitte. She has spent the majority of her career writing about, conducting research in, designing, and consulting on human capital practices. Johnson led the Human Resource Competency Study with the University of Michigan and six other professional organizations around the world, and co-authored the resulting book, *HR Competencies: Mastery at the Intersection of People and Business* (Society for Human Resource Management, 2008).
Candace Atamanik, research manager, performance management research, Bersin by Deloitte, Deloitte Consulting LLP

Candace Atamanik is a research manager in Bersin by Deloitte's talent management research practice. Her research focuses on talent strategy, talent management, performance management, and competencies. Atamanik's work has been featured in *Fast Company*, *The Atlantic*, and *Academic Leader* as well as in *Leader to Leader* and *Organizational Dynamics*. She has a BS in psychology from Pepperdine University and an MS in industrial and organizational psychology from Florida International University, and was a PhD candidate in industrial and organizational psychology at Florida International University.

Madhura Chakrabarti, research manager, people analytics research, Bersin by Deloitte, Deloitte Consulting LLP

Madhura Chakrabarti, PhD, is a research manager at Bersin by Deloitte focused on talent analytics. She has a bachelor's degree in psychology from the University of Delhi and an MA and PhD in industrial/organizational psychology from Wayne State University, Michigan. Previously, Chakrabarti worked at Dell, Ford Motor Company, and Aon Hewitt in various roles spanning people analytics, employee engagement, and pre-employment assessments.

Janet Clarey, research manager, learning and development research, Bersin by Deloitte, Deloitte Consulting LLP

Janet Clarey is a manager focused on learning and development research at Bersin by Deloitte, where she has done work in the areas of learning culture, high-impact learning organization maturity, and learning technology. She holds a BA in communications from the State University of New York at Oswego, a master's degree in instructional design for online learning from Capella University, and has completed coursework toward a doctorate from Syracuse University in instructional design, development, and evaluation.

Andrea Derler, research manager, leadership research, Bersin by Deloitte, Deloitte Consulting LLP

Andrea Derler, PhD, leads the leadership and succession management research practice for Bersin by Deloitte. She holds a doctoral degree in economics (leadership and organization) and a master's degree in philosophy. Prior to joining Bersin by Deloitte, she collaborated closely with organizations in the United States as well as Europe to conduct practice-oriented leadership research.

Denise Moulton, research manager, middle-market HR research, Bersin by Deloitte, Deloitte Consulting LLP

Denise Moulton is a research manager in mid-market research at Bersin by Deloitte. She has several years of practitioner experience, focusing on talent acquisition, talent management, and human resources operations. Previously, Moulton was a talent acquisition leader at Hasbro, Inc., where she provided recruitment management for global and commercial business units. She holds a bachelor of arts degree from the University of Rhode Island and is a certified Internet recruiter.
Acknowledgements

Global Human Capital Trends 2016 is the result of the efforts of a global team working over the past 12 months, including hundreds of contributors from across the global Deloitte network as well as the counsel and input of our clients.

Special thanks

Julie May for overall direction of the Global Human Capital Trends program throughout the year. You guided us in handling the hundreds of details and decisions, including managing dozens of country champions and an editorial team with a myriad of authors and contributors, that go into delivering a global survey and report. We appreciate your focus on the many activities needed to produce a global report of this scope and complexity. Your insights and editorial pen are evident in every chapter of the report.

The core Global Human Capital Trends team: Josh Bersin, Ben Dollar, Nicky Wakefield, David Mallon, Luke Monck, Jen Stempel, and Shrawini Vijay. Your dedication throughout the year, involving many early mornings and late nights, made this project possible. Your probing analysis and curiosity guided our thinking on this year’s trends, survey development and analysis, and report writing.

Ina Gantcheva, Elizabeth Chodaczek, Rebecca Griffiths, Lana Koretsky, Sarthak Mittal, and Antonio Romo Fragoso for leading the Global Human Capital Trends program management office.

Junko Kaji, Matthew Lennert, Sonya Vasilieff, Kevin Weier, and the remarkable Deloitte University Press team, led by Jon Warshawskey, for their editorial and design skills. You continued to push us to sharpen our thinking and writing to produce (we hope) insightful and actionable messages.

Katrina Drake Hudson and Andrea Sacasa for leading our integrated marketing program, developing a series of initiatives to share the global report and survey through a growing web of digital, traditional marketing, and social media channels. Thanks as well to Melissa Doyle for managing the public relations programs.

And last but not least, a special thank you to Brett Walsh and Jason Geller, the global and US leaders of our Human Capital practices. We are grateful for your support and encouragement every step of the way in producing this report.

Global survey and research team

Research leaders
Shrawini Vijay, Ankita Jain, Rahul Kolhe, Mankiran Kaur, and Ekta Khandelwal

Research team
Vasvi Aren, Alka Choudhury, Srishti Dayal, Rahat Dhir, Garima Tyagi Dubey, Mukta Goyal, Shivank Gupta, Bhumi Jain, Ankita Khaneja, Archit Khare, Sukhmani Lamba, Maansi Pandey, Gauri Paranjpe, Divya Patnaik, Deepika Sharma, Goral Shroff, Aparajita Sihg, Abhishek Tiwari
Global Human Capital leaders

Brett Walsh  
Global Human Capital leader  
Deloitte MCS Limited  
bcwalsh@deloitte.co.uk

Dimple Agarwal  
Global Organization Transformation & Talent leader  
Deloitte MCS Limited  
dagarwal@deloitte.co.uk

Michael Stephan  
Global HR Transformation leader  
Deloitte Consulting LLP  
mstephan@deloitte.com

David Foley  
Global Actuarial, Rewards, and Analytics leader  
Deloitte Consulting LLP  
dfoley@deloitte.com

Nichola Holt  
Global Employment Services leader  
Deloitte Tax LLP  
nicholt@deloitte.com

Jeff Schwartz  
Global Human Capital leader, Marketing, Eminence, and Brand  
Deloitte Consulting LLP  
jeffschwartz@deloitte.com

Human Capital country leaders

Americas

Americas & Chile
Jaime Valenzuela  
Deloitte Audit y Consult.  
jvalenzuela@deloitte.com

United States
Jason Geller  
Deloitte Consulting LLP  
jgeller@deloitte.com

Canada
Heather Stockton  
Deloitte Canada  
hstockton@deloitte.ca

Mexico
Tomas Fernandez  
Deloitte Consulting Mexico  
tofernandez@deloittemx.com

Uruguay, LATCO
Verónica Melián  
Deloitte SC  
vmelian@deloitte.com

Argentina
Leonardo Pena  
Deloitte & Co. S.A.  
lepena@deloitte.com
The new organization: Different by design

**Americas (cont.)**

**Brazil**
Roberta Yoshida
Deloitte Consultores
royoshida@deloitte.com

**Colombia**
Beatriz Dager
Deloitte Ases. y Consulto
bdager@deloitte.com

**Costa Rica**
Arturo Velasco
Deloitte & Touche S.A.
arvelasco@deloitte.com

**Dutch Caribbean**
Maghalie van der Bunt
Deloitte Dutch Caribbean
mvanderbunt@deloitte.com

**Ecuador**
Roberto Estrada
Andeanecuador Consultores
restrada@deloitte.com

**Panama**
Jessika Malek
Deloitte Consultores
jmalek@deloitte.com

**Peru**
Alejandra D’Agostino
Deloitte & Touche SRL
aldagostino@deloitte.com

**Venezuela**
Maira Freites
Lara Marambio & Asociados
mfreites@deloitte.com

**Asia Pacific**

**Asia Pacific & China**
Jungle Wong
Deloitte Consulting (Shanghai) Co. Ltd,
Beijing Branch
junglewong@deloitte.com.cn

**Australia**
David Brown
Deloitte Touche Tohmatsu
davidbrown@deloitte.com.au

**India**
Sanjay Behl
Deloitte India
sxbehl@deloitte.com

**Japan**
Akio Tsuchida
Deloitte Tohmatsu Consulting Co. Ltd
akitsuchida@tohmatsu.co.jp

**Korea**
Kihoon (Alex) Jo
Deloitte Consulting
kijo@deloitte.com

**New Zealand**
Hamish Wilson
Deloitte
hawilson@deloitte.co.nz

**Southeast Asia**
Nicky Wakefield
Deloitte Consulting Pte Ltd
nwakefield@deloitte.com
Europe, Middle East, and Africa

EMEA
Ardie Van Berkel
Deloitte Consulting BV
avanberkel@deloitte.nl

United Kingdom
Anne-Marie Malley
Deloitte MCS Limited
amalley@deloitte.co.uk

Africa
Werner Nieuwoudt
Deloitte Consulting Pty
wnieuwoudt@deloitte.co.za

Austria
Christian Havranek
Deloitte Austria
chavranek@deloitte.at

Belgium
Yves Van Durme
Deloitte Consulting
yvandurme@deloitte.com

Central Europe
Evzen Kordenko
Deloitte Advisory s.r.o.
ekordenko@deloittece.com

CIS
Christopher Armitage
CJSC Deloitte & Touche CIS
carmitage@deloitte.ru

Cyprus
George Pantelides
Deloitte Ltd
gpantelides@deloitte.com

Denmark
Ylva Ingeborg Brand Beckett
Deloitte Denmark
ybeckett@deloitte.dk

Finland
Kirsi Kemi
Deloitte Oy
kirsi.kemi@deloitte.fi

France
Philippe Burger
Deloitte Conseil
phburger@deloitte.fr

Guy Aguera
Deloitte Conseil
gaguera@deloitte.fr

Germany
Udo Bohdal-Spiegelhoff
Deloitte Consulting GmbH
ubohdal@deloitte.de

Greece
Petros Mihos
Deloitte Business Solutions S.A.
pmihos@deloitte.gr

Ireland
Cormac Hughes
Deloitte & Touche
cohughes@deloitte.ie

Israel
Zohar Yami
Brightman Almagor Zohar & Co.
zyami@deloitte.co.il

Italy
Lorenzo Manganini
Deloitte Consulting SRL
lmanganini@deloitte.it

Kenya
Kimani Njoroge
Deloitte Consulting Ltd
knjoroge@deloitte.co.ke
Europe, Middle East, and Africa (cont.)

Luxembourg  
Basil Sommerfeld  
Deloitte Tax & Consulting  
bsommerfeld@deloitte.lu

Middle East  
Ghassan Turqieh  
Deloitte & Touche (M.E.)  
gturqieh@deloitte.com

Netherlands  
Petra Tito  
Deloitte Consulting BV  
ptito@deloitte.nl

Nordics  
Eva Tuominen  
Deloitte Oy  
eva.tuominen@deloitte.fi

Norway  
Eva Gjovikli  
Deloitte AS  
egjovikli@deloitte.no

Poland  
Magdalena Jonczak  
Deloitte Business Consulting S.A.  
mjonczak@deloittece.com

Portugal  
Nuno Portela Belo  
Deloitte Consultores, S.A.  
nbelo@deloitte.pt

Spain  
Enrique de la Villa  
Deloitte Advisory, S.L.  
edelavilla@deloitte.es

Sweden  
Jonas Malmlund  
Deloitte Sweden  
jmalmlund@deloitte.se

Switzerland  
Sarah Kane  
Deloitte Consulting Switzerland  
sakane@deloitte.ch

Turkey  
Tolga Yaveroglu  
Deloitte Turkey  
tyaveroglu@deloitte.com