2020 Deloitte Global Human Capital Trends
The social enterprise at work: Paradox as a path forward
Energy, Resources & Industrials (ER&I)
## A decade of Human Capital Trends

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Revolution/evolution</strong></td>
<td><strong>Leap ahead</strong></td>
<td><strong>Resetting horizons</strong></td>
<td><strong>Engaging the 21st-century workforce</strong></td>
<td><strong>Leading in the new world of work</strong></td>
<td><strong>The new organization: Different by design</strong></td>
<td><strong>Rewriting the rules for the digital age</strong></td>
<td><strong>The rise of the social enterprise</strong></td>
<td><strong>Leading the social enterprise: Reinvent with a human focus</strong></td>
<td><strong>The social enterprise at work: Paradox as a path forward</strong></td>
</tr>
<tr>
<td>Diversity and inclusion: Driving business performance</td>
<td>Global diversity dividend</td>
<td>From diversity to inclusion</td>
<td>Diversity and inclusion: The real gap</td>
<td>Diversity and inclusion: The real gap</td>
<td>Diversity and inclusion: The real gap</td>
<td>Diversity and inclusion: The real gap</td>
<td>Diversity and inclusion: The real gap</td>
<td>Diversity and inclusion: The real gap</td>
<td>Diversity and inclusion: The real gap</td>
</tr>
<tr>
<td>Culture, engagement, experience</td>
<td>Branding the workplace/ Organization acceleration</td>
<td>The overwhelmed employee</td>
<td>Culture: The naked organization</td>
<td>The employee experience</td>
<td>Well-being: A strategy and a responsibility/Impact connected workplace</td>
<td>Employee experience to human experience</td>
<td>Employee experience to human experience</td>
<td>Employee experience to human experience</td>
<td>Employee experience to human experience</td>
</tr>
<tr>
<td>Talent</td>
<td>Talent in the upturn</td>
<td>Aging workforce/ Leading talent from B2B</td>
<td>Talent acquisition revisited/ Beyond retention</td>
<td>Workforce on demand</td>
<td>Talent acquisition: Cognitive recruiter</td>
<td>The longevity dividend</td>
<td>Accessing talent/ Talent modality</td>
<td>The post-generational workforce: From millennials to peripherals</td>
<td>The post-generational workforce: From millennials to peripherals</td>
</tr>
<tr>
<td>Future of work</td>
<td>Contingent workforce</td>
<td>#Social #Mobile @Work</td>
<td>Open talent economy/Workplaces of the future</td>
<td>Simplification of Work/Machines as talent</td>
<td>The gig economy/ Org. Design: Racial teams</td>
<td>Future of Work/ Org. of the Future</td>
<td>Workforce automation/ AI robotics, automation</td>
<td>From jobs to opportunities/ Alternative workforce/ Org performance</td>
<td>Superteams: Putting AI in the group</td>
</tr>
<tr>
<td>Learning/ careers</td>
<td>Ladder to lattice</td>
<td>War to develop talent</td>
<td>Corporate learning redefined/ Quest for workforce capability</td>
<td>Learning and development into the spotlight</td>
<td>Learning: Employees take charge</td>
<td>Careers and learning: Real time, at the time</td>
<td>From careers to experiences</td>
<td>Learning in the flow of life</td>
<td>Knowledge management: Creating context for a connected world</td>
</tr>
<tr>
<td>People analytics</td>
<td>Workforce analytics</td>
<td>Seeing around corners/ People risk</td>
<td>Thinking like an economist</td>
<td>Talent analytics in practice</td>
<td>HR and people analytics/ People-data everywhere</td>
<td>People analytics: Gearing speed</td>
<td>People analytics: Recalculating the rules</td>
<td>People data: How far is too far?</td>
<td>Measuring workforce strategies: New questions for better returns</td>
</tr>
<tr>
<td>Leadership</td>
<td>Next-generation leadership/ Leading the way</td>
<td>Fast track to the top/ Growth is job #1 / Operation globalization</td>
<td>Leadership next</td>
<td>Leaders at all levels</td>
<td>Leadership: A personalisate</td>
<td>Leadership awakened</td>
<td>Leadership disrupted</td>
<td>The symphonic C-suite</td>
<td>Ethics and the future of work: From &quot;What is it good for?&quot; to &quot;How should it be?&quot;</td>
</tr>
<tr>
<td>Evolving HR</td>
<td>HR in the cloud/ COOs for HR/ Employer health care reform/ Emerging markets</td>
<td>Clouds in the forecast</td>
<td>Transforming HR/Boards changing the HR game</td>
<td>Redskilled HR team/ Global and locally/ Basic to cloud</td>
<td>Reinventing HR</td>
<td>HR: New mandate/ Digital HR revolution</td>
<td>DigitalHR</td>
<td>HR cloud/ A launchpad</td>
<td>A memo to HR: Expanded scope and extended influence</td>
</tr>
</tbody>
</table>

### Purpose: Belonging amid individuality
- **Potential:** Security through reinvention
- **Perspective:** Boldness into uncertainty

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This year, we focus on answering a paradoxical question: *Can organizations remain distinctly human in a technology-driven world?*
These attributes represent the DNA of the social enterprise at work

**Purpose**
An organization that doesn’t just talk about purpose, but embeds meaning into every aspect of work every day

**Potential**
An organization that is designed and organized to maximize what humans are capable of thinking, creating and doing in a world of machines

**Perspective**
An organization that encourages and embraces a future orientation, asking not just how to optimize for today, but how to create value tomorrow
Energy, Resources & Industrials (ER&I) Report Demographics

• A total of 946 ER&I respondents participated from:
  • 35% or 332 from Industrial Products & Construction
  • 32% or 300 from Oil, Gas & Chemicals
  • 20% or 185 from Power, Utilities, and Renewables
  • 14% or 129 from Mining & Metals

• Over half of the respondents are from EMEA (57%)

• While 42% of ER&I respondents are from a small business (>1000 employees), 32% from medium (between 1000 to 10,000) and 26% from large (10,000+)

• This is a business focused survey, not HR only with 2/5 of respondents coming from the business

2020 Global Human Capital Trends

With ER&I organizations adapting to the Future of Work, many key trends have risen to the top of the 2020 Global Human Capital Trends Report (highlighted in red box):

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Potential</th>
<th>Perspective</th>
</tr>
</thead>
<tbody>
<tr>
<td>Belonging: From comfort to connection to contribution</td>
<td>Superteams: Putting AI in the group</td>
<td>The compensation conundrum: Principles for a more human approach</td>
</tr>
<tr>
<td>Designing work for well-being: Living and performing at your best</td>
<td>Knowledge management: Creating context for a connected world</td>
<td>Governing workforce strategies: New questions for better results</td>
</tr>
<tr>
<td>The postgenerational workforce: From millennials to perennials</td>
<td>Beyond reskilling: Investing in resilience for uncertain futures</td>
<td>Ethics and the Future of Work: From “could we” to “how should we”</td>
</tr>
</tbody>
</table>

Final Chapter – A memo to HR: Expand focus and extend influence
### ER&I Overall Highlights

<table>
<thead>
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</tr>
</thead>
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<td>Designing work for well-being: Living and performing at your best</td>
<td>For an industry that must heavily focus on employee safety, it might be surprising to hear that the ER&amp;I industry doesn’t always have a great focus on employee well-being. This comes with the acknowledgement that worker well-being is in fact very important - and has been brought further to the forefront by COVID-19. The ER&amp;I industry seems to be slow to make the mindset shift that safety is not nearly the only factor that makes up a worker’s well-being. Another clear mindset shift is that HR is not the only responsible party to address a worker’s wellbeing – this also sits on the shoulders of the C-Suite, Leaders and Managers. Respondents agree that top ways the ER&amp;I industry can support well being include more autonomy to employees and using technology to support collaboration.</td>
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<td>ER&amp;I industry faces a major challenge ahead as it is tasked to reskill workers to keep up with the Future of Work. With the fast-paced movement toward working in the digital era, especially in light of the virtual demands of COVID-19, this capability becomes even more pressing as organizations begin to transition from the traditional workforce into a digital environment. In terms of readiness, some sectors still need to explore and assess the skills of their workers today, while other sectors can already predict that upskilling and capability building to their workforce will be a necessity.</td>
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<td>Ethics and the Future of Work: From “could we” to “how should we”</td>
<td>As the ER&amp;I industry is forced to accelerate into the Future of Work and face a digital transformation, it’s clear that many sectors are not well prepared to manage the expected ethical dilemmas facing their people and other threats in this new way of working. This is especially apparent after experiencing the demand of digital from COVID-19. Ethical concerns vary from having leaders and policies in place to manage ethical concerns, to providing work that account for climate and sustainability to maintenance of privacy and control of user data.</td>
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How do you approach employee well-being that is focused on more than just employee safety?

- 80% of respondents identified worker well-being and its importance to business as an important or very important priority for their organization’s success over the next 12 to 18 months, but only 12% say they are very ready to address this trend.

- While 96% of respondents consider well-being an organizational responsibility, 34% respondents cited HR as primarily responsible for having the greatest ability to influence the designing of work for driving well-being, closely followed by front-line managers (21%) and Functional or Department Leaders (19%).

- COVID-19 has brought forward more comprehensive consideration for well-being now more than ever. Besides physical well-being, organizations must take actions to improve employees' mental health and reinstate the feeling of job security to enable long-term sustainability.
BEYOND RESKILLING

Can you anticipate the skills and capabilities that will be needed over the next 3 years?

- 75% of organizations say reskilling the workforce is important or very important for their success over the next 12–18 months, but only 9% say they are very ready to address this trend.

- 55% respondents say they are able to anticipate the skills & capabilities needed in the next 3 years to some extent, while 17% are able to anticipate to a great extent.

- More than 36% respondents say that 50% of their workforce will need to change their skills & capabilities in the next 3 years, closely followed by 35% saying 25% of workforce will need reskilling. Only 6% say 75% of workforce will need to reskill.

- 77% respondents ranked training current employees to enhance skillsets in existing positions/jobs as the way to source skills and capabilities for the organization’s needs while almost 80% believed outsourcing the skills and the capabilities to be the lowest priority.
76% of organizations say Ethics and Future of Work is important or very important for their success over the next 12–18 months, but only 15% say they are very ready to address this trend.

85% believe that the Future of Work raises ethical challenges and only 36% have clear policies and leaders in place to manage them.

COVID-19 Work-from-Home consideration - Do organizational safety rules at workplaces apply to employees when they are working from home? The level of intrusiveness from the employer into the employee’s personal workspace is significantly raised. How employees manage their time, what their home life is like, etc. will bring up a lot of privacy and comfortability issues for both the employees and employers.
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Purpose

DESIGNING WORK FOR WELL-BEING
Living and performing at your best.

For an industry that must heavily focus on employee safety, it might be surprising to hear that the ER&I industry doesn’t always have a great focus on employee well-being. This comes with the acknowledgement that worker well-being is in fact very important - and has been brought further to the forefront by COVID-19.

Potential

BEYOND RESKILLING
Investing in resilience for uncertain futures.

ER&I industry faces a major challenge ahead as it is tasked to reskill workers to keep up with the Future of Work. With the fast paced movement toward working in the digital era, especially in light of the virtual demands of COVID 19, this capability becomes even more pressing as organizations begin to transition a traditional workforce into a digital environment.

Perspective

ETHICS AND THE FUTURE OF WORK
From “could we” to “how should we.”

As the ER&I industry is forced to accelerate into the Future of Work and face a digital transformation, it’s clear that many sectors are not well prepared to manage the expected ethical dilemmas facing their people and other threats of work in this new way of working. This is especially apparent after experiencing the demand of digital from COVID 19.

ER&I Industry Survey Demographics

- A total of 946 ER&I respondents participated from
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2020 Deloitte Global Human Capital Trends
The social enterprise at work: Paradox as a path forward
Oil, Gas & Chemicals
2020 HC Trends Report: Oil, Gas & Chemicals

This year’s trends leverage findings from our Global Human Capital Trends survey with nearly 9,000 respondents from the Energy, Resources & Industrial industry in 119 countries.

This year, we focus on answering a paradoxical question: Can organizations remain distinctly human in a technology-driven world? Our Trends are grouped into the three attributes of the social enterprise: **purpose, potential, and perspective**

### Regions

- **Western Europe**: 21%
- **Latin & South America**: 18%
- **North America**: 14%
- **Asia**: 13%
- **Nordic Countries**: 11%
- **Africa**: 10%
- **Central & Eastern Europe**: 10%
- **Middle East**: 2%
- **Oceania**: 0.33%

### Company Size

- **Large (10,001+)**: 32%
- **Medium (1,001 to 10,000)**: 28%
- **Small (1 to 1,000)**: 40%
- **Non-HR**: 35%
- **HR**: 65%

### C-Suite

- **C-Suite**: 10%
- **Vice President**: 25%
- **Individual Contributor**: 18%
- **Mid-level**: 47%


• A total of 300 OG&C respondents participated
• Over half of the respondents are from EMEA (54%). 32% of the respondents are from the Americas
• 47% of OG&C respondents are from privately owned companies and 43% are from publicly owned companies
• 65% of respondents work in HR
• Only 10% of respondents are part of the C-Suite. 47% work in Mid-level positions
ER&I Overall Highlights: Oil, Gas & Chemicals

**Purpose**

**Designing work for wellbeing:** Living and performing at your best

**Potential**

**Beyond reskilling:** Investing in resilience for uncertain futures

**Perspective**

**Ethics and the Future of Work:** From “could we” to “how should we”

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### General Key Takeaways

The OG&C sector continues to focus on safety, but can the sector adapt when employees desire to see a focus on holistic wellbeing - including mental health, family stability, and financial wellbeing? Doing so may present great opportunities to strengthen the link between worker well-being and organizational performance.

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The OG&C sector faces two major challenges affecting the reskilling of their employees: Understanding which skills will stand the test of time, and the ability to prioritize workforce investments brought on by the current economic landscape. Organizations who work through these restraints may increase their own resilience in the face of constant change.

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With COVID-19 forcing ER&I to accelerate into the Future of Work (FoW), the OG&C sector is acutely aware of ethical dilemmas facing their organizations. For example, as executives look to enhance their footprint into AI as more employees working remote, the data and details around AI investments, particularly around who monitors the AI or who makes directional decisions, must be considered to not only comply with regulations, but to also build trust with their workforce.
How do you approach employee well-being that is focused on more than just employee safety?

• OG&C organizations traditionally associate well-being with physical safety. Frequent changes in environmental policies and oil prices make health and well-being a hard target for businesses and a difficult conversation for HR in this industry. However, COVID-19 introduces an opportunity for organizations to talk about well-being holistically in terms of mental health, feeling engaged and staying connected.

• OG&C organizations think about productivity through efficiency and cost savings. There is an opportunity to design programs that employees are interested in, while avoiding spending on initiatives that aren’t useful or needed. In this way workforce experience and organizational performance is improved while cost savings are achieved.

• 81% of respondents identified well-being as an important or very important priority for their organization’s success over the next 12 to 18 months, but only 12% say they are very ready to address this trend.

• 40% of respondents cited HR as primarily responsible for having the greatest ability to influence the design of work for driving well-being.
Can you anticipate the skills and capabilities that will be needed over the next 3 years?

- OG&C organizations have experienced a volatile downturn due to the lack of demand for resources in the COVID-19 environment. This lack of demand has decreased revenue along with the available monetary resources for organization’s to invest in their own people.

- Concerns surrounding the quickness in which skills change and are automated are currently preventing organizations from investing in training employees on skills that could become obsolete in the next 12 – 18 months.

- Opportunities for reskilling HR organizations, use of eLearning, performance management, and success factors exist to adjust to new ways of working.

- 71% of respondents stated they need additional information to understand the readiness state of their workforce to meet new and changing demands.

- 74% of organizations say reskilling the workforce is important or very important for their success over the next 12 – 18 months, but only 9% say they are very ready to address this trend.
What metrics can you collect now that will help you to understand how prepared we are for the Future of Work?

• Generating deeper insights about the state of the workforce, especially as it relates to workforce readiness, ability to meet shifting demands, and managing external impacts is critical to informing and shaping 21st century workforce strategies.

• The pressure to generate deeper insights is amplified by COVID-19. Amidst layoffs and furloughs, companies may face a shortage of skilled labor when the market rebounds. Organizations should use this opportunity to rethink how work is done, align their strategies to the future reality, and prepare for a new environment.

• 73% of organizations say governing changing workforce strategies is important or very important for their success over the next 12 to 18 months, but only 10% say they are very ready to address this trend.

• 49% of respondents report that the level of interest from leaders on the state of the workforce has increased, and 46% of C-Suite respondents identified governing a changing workforce strategy as an important trend.

• 67% of C-Suite respondents selected readiness of existing workforce to meet new demands as important to understanding the state of the workforce moving forward.

• 50% of C-Suite respondents selected awareness of external social or political movements affecting the workforce as important to understanding the state of the workforce moving forward.
Outside of the ethical concerns due to legal and regulatory demands, what other ethical considerations do you have as it relates to the Future of Work?

- It is important, now more than ever, for organizations to manage ethics in the context of the Future of Work, as the pressures to redefine the way they work are amplified by COVID-19 and its implications.

- During this time an organization’s business resiliency depends greatly on its ability to equip its workforce with the tools and methods required for a virtual way of working as well as ensuring the safe return of its essential workers to the physical workplace.

- 76% of organizations say ethics related to the Future of Work is important or very important for their success over the next 12 to 18 months, but only 21% say they are very ready to address this trend.

- 84% of respondents think there are ethical concerns related to the Future of Work, but only 38% of respondents state that they have clear policies and leaders in place to manage ethics in the context of Future of Work.

- 50% of respondents state managing ethical issues related to the Future of Work is among its top issues.

- 30% of respondents are not ready to manage the ethical concern of the use of algorithms to influence decisions.

- 38% of respondents are not ready to manage the ethical concern of the use of AI and data to monitor individuals and the workplace.
Mental well-being is top of mind right now. Most OG&C clients typically talk about well-being from the lens of safety. COVID-19 has introduced the mental health element as well as the push to stay connected and feel engaged.

OG&C clients are asking: “What will the new world look like?” If you have to work completely virtually from your house, what is the setup you need to monitor the operations in the field? How will that work?
Purpose

DESIGNING WORK FOR WELL-BEING

Living and performing at your best.

The OG&C sector continues to focus on safety, but can the sector adapt when employees desire to see a focus on holistic wellbeing - including mental health, family stability, and financial wellbeing? Doing so may present great opportunities to strengthen the link between worker well-being and organizational performance.

Potential

BEYOND RESKILLING

Investing in resilience for uncertain futures.

The OG&C sector faces two major challenges affecting the reskilling of their employees: Understanding which skills will stand the test of time, and the ability to prioritize workforce investments brought on by the current economic landscape. Organizations who work through these restraints may increase their own resilience in the face of constant change.

Perspective

ETHICS AND THE FUTURE OF WORK

From “could we” to “how should we.”

With COVID-19 forcing ER&I to accelerate into the Future of Work (FoW), the OG&C sector is acutely aware of ethical dilemmas facing their organizations. For example, as executives look to enhance their footprint into AI as more employees are working remotely, the data and details around AI investments, particularly around who monitors the AI or who makes directional decisions, must be considered to not only comply with regulations, but to also build trust with their workforce.

Oil, Gas & Chemicals Survey Demographics

- A total of 300 OG&C respondents participated
- Over half of the respondents are from EMEA (54%). 32% of the respondents are from the Americas
- 47% of OG&C respondents are from privately owned companies and 43% are from publicly owned companies
- 65% of respondents work in HR
- Only 10% of respondents are part of the C-Suite. 47% work in Mid-level positions

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This year, we focus on answering a paradoxical question: Can organizations remain distinctly human in a technology-driven world? Our Trends are grouped into the three attributes of the social enterprise: purpose, potential, and perspective

- A total of 332 IP&C respondents participated
- Over half of the respondents are from EMEA (59%)
- 63% of IP&C respondents are from privately owned companies and 33% are from publicly owned companies
- 61% of respondents work in HR
- Only 15% of respondents are part of the C-Suite. 41% work in Mid-level positions

## ER&I Overall Highlights: Industrial Products & Construction

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<thead>
<tr>
<th>Purpose</th>
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<tbody>
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<td>Designing work for well-being: Living and performing at your best</td>
<td>Even with respondents rating this human capital trend as important or very important, the IP&amp;C sector is still <strong>slow to address or adopt well-being activities</strong>. Executives may be keen to explore the role of organizations in driving well-being, and the benefits it might have to optimizing business performance.</td>
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<td>Beyond reskilling: Investing in resilience for uncertain futures</td>
<td>Perhaps the most significant human capital trend for the IP&amp;C industry is how to <strong>address reskilling the workforce with the constant change in business needs</strong>. If organizations can address barriers on how to identify and prioritize development needs, they may also address the organization’s ability to be resilient for uncertain futures.</td>
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<td>With the shift in work, careers and AI technology, the IP&amp;C sector may <strong>not be prepared for ethical issues posed by the Future of Work</strong>. One unique question challenges the status quo – should organizational safety rules apply to employees when they are working from home? What should or should not change?</td>
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How do you approach employee well-being that is focused on more than just employee safety?

- 79% of respondents identified **well-being as an important or very important** priority for their organization’s success over the next 12 to 18 months, but only 13% say they are very ready to address this trend.
- While 33% of respondents cited **HR as primarily responsible for having the greatest ability to influence the design of work for driving well-being**, respondents believe frontline managers (25%), functional or department leaders (19%), and C-suite (13%) are also responsible for driving well-being.
- IP&C organizations face challenges around **virtual work due to physical manufacturing**. This may cause reduced flexibility for organizations to redesign the work/workplace during the COVID-19 response. These organizations may **accelerate the adoption of digital tools and technologies** to scale up remote collaboration at the production stages, hence promoting flexible work schedules for employees.
- COVID-19 has necessitated **more comprehensive discussions around well-being** now more than ever. Besides physical well-being, organizations must take actions to improve employees’ mental health and reinstate the feeling of job security, hence enabling long-term sustainability.
• 78% say fostering a sense of belonging is critical to success in the next 12-18 months, but only 46% say they are ready.
• 91% believe a sense of belonging greatly supports org performance, and 69% believe it does so by enhancing alignment and org objectives.
• Many organizations have a very traditional workplace culture which can both hurt and hinder a feeling of organizational belonging.
• IP&C organizations going through M&A have stronger needs of organizational belonging.
• 36% believe no clear accountability within the org is the top barrier to creating a sense of belonging, followed by 33% believing that it is not a leadership priority.
• Organizations have trouble cascading communications and sometimes it may be beneficial to get an objective third party to redesign the flow of communication after analysis.
• Leaders must be able to create and foster an environment of productivity and allow every employee a sense of being valued.
• The stress placed on and decisions made from IP&C organizations due to COVID-19 will have profound impact on how people perceive belonging to their workplace.

How much do you spend on showing appreciation and recognition to your workforce? How much do you get back?
Can you anticipate the skills and capabilities that will be needed over the next 3 years?

- 75% of organizations say reskilling the workforce is important or very important for their success over the next 12–18 months, but only 10% say they are very ready to address this trend.

- 53% respondents say they are able to anticipate the skills & capabilities that will be needed in the next 3 years to some extent while 14% can anticipate them to a great extent.

- This correlates with more than 50% of the workforce needing to change their skills & capabilities in the next 3 years.

- However, 42% respondents say they will have difficulty in identifying development needs and priorities and that this is the greatest barrier to workforce development.

- 52% respondents say they are not rewarded for developing their own skills and capabilities.

- As digitalization is revolutionizing the Future of Work, IP&C organizations need to adapt themselves and invest in developing employees' capabilities to constantly refresh skills, thereby helping organizations continue to develop the workforce they need.

- To successfully close the skill gap in the IP&C sector, organizations must identify particular skills that are needed to drive future operations and embrace digitized and virtual learning approaches to train employees. This is both a cost-effective and efficient way to reinvent the workforce and build long-term resilience in the post-pandemic era.
More respondents say their organizations define "knowledge management" as sharing knowledge (43%) and preserving knowledge (42%) versus deriving value (38%) or creating knowledge (29%).

Organizational silos (58%), lack of incentives (46%), and frequent shifting of roles at different time (39%) are the top 3 barriers identified to effective knowledge management.

55% say their alternative workforce does not have knowledge sharing tools and platforms.

70% respondents say AI is being incorporated into their knowledge management strategies beyond a small extent (to a small extent at 41%, to somewhat extent at 22.5%, and to a great extent at 6%)

There is only a small emphasis and resource dedication to knowledge management due to COVID-19 which may be missing out on an opportunity to create more value.

With layoffs and forced retirements, organizations have lost significant internal knowledge from this separated workforce. Organizations may learn through the COVID-19 response that a knowledge management database is more necessary than previously thought.

Employees will not share knowledge unless incentivized to do so. Sharing knowledge can be perceived as undermining own expertise.
87% of respondents believe that the Future of Work raises ethical challenges but only 13% think it is the single most important issue to manage in their organization.

35% of respondents say that their organization has clear policies to manage ethics in the context of Future of Work, while 23% of respondents say that they do not have any policies and processes for managing ethics.

75% of organizations believe that the radical shift in work, career, and jobs due to AI and new employment models is important or very important, yet only 49% are prepared (ready or somewhat ready) for this shift.

COVID-19 Work-from-Home Implications:

- Do organizational safety rules at workplaces apply to employees when they are working from home? The level of intrusiveness from the employer into the employee’s personal workspace is significantly raised. How employees manage their time, what home life is like will bring up a lot of privacy issues for both the employees and employers.

- For those physically going into work, do organizations make taking temperature or providing your tracking data mandatory?

Understanding the role of Unions in ethics discussions is also important to IP&C organizations.

The cyber component of ethical discussion is particularly relevant today.
What is better: Compensate for skills, compensate for tenure, or reallocate spend to hire gig workers?

- 67% of organizations say that the **changing nature of compensation expectation and strategies are important or very important** to their success, while only 40% of organizations say that they are ready to address this trend and only 15% of organizations say that they are not at all ready to address this trend.
- 71% of organizations are planning to address the issue of **growing percentage of contract and gig workers** in their compensation strategy.
- 68% of respondents believe that **consideration of market factors (availability of skilled labor at desired prices)** will become more important in designing the compensation strategy in the next 3 years; 56% of organizations consider the compensation strategy will continue to be impacted by the need for individuals to continuously invest in new skills and capabilities.
- Owing to the huge skill shortage present in the IP&C sector, organizations may **strategize to hire more gig workers going forward**.
- Organizations may consider a skill vs. tenure approach, thereby considering to pay a **higher compensation to skilled workers** than tenured workers.
- While designing compensation strategies, IP&C organizations must not only consider compensation as a number, but also **consider how employees value the organization**.
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Notes From the Field: Industrial Products & Construction

With nearly 9,000 ER&I industry respondents in 119 countries, we have clients at every stage in answering a paradoxical question: Can organizations remain distinctly human in a technology-driven world? Do any of these stories resonate with you?

Our industry tends to think about well-being in a specific way – *strictly health*. The environment brought on by COVID 19 forces leaders to focus on employees more than ever. There are both workforce and operational benefits to expand well-being to include mental health, family health, financial health and other forms of personal care.

Some employees **miss the old days** where managers knew people by name, brought people to their homes, and walked around the floor. How could companies **recreate this feeling of belonging**? Is it worth it?

**Skill gaps and shortages** are discussed very often, but where do you start?

COVID 19 has certainly amplified the need for creative learning solutions.
ER&I 2020 Human Capital Trends: Industrial Products & Construction

This year’s trends leverage findings from our Global Human Capital Trends survey with nearly 9,000 respondents in 119 countries. Our Trends are grouped into the three attributes of the social enterprise: purpose, potential, and perspective. Leading ER&I trends for each attribute are:

**Purpose**

**DESIGNING WORK FOR WELL-BEING**

Living and performing at your best.

Even with respondents rating this human capital trend as important or very important, the IP&C sector is still slow to address or adopt well-being activities. Executives may be keen to explore the role of organizations in driving well-being, and the benefits it might have to optimizing business performance.

**Potential**

**BEYOND RESKILLING**

Investing in resilience for uncertain futures.

Perhaps the most significant human capital trend for the IP&C industry is how to address reskilling the workforce with the constant change in business needs. If organizations can address barriers on how to identify and prioritize development needs, they may also address the organization’s ability to be resilient for uncertain futures.

**Perspective**

**ETHICS AND THE FUTURE OF WORK**

From “could we” to “how should we.”

With the shift in work, careers and AI technology, the IP&C sector may not be prepared for ethical issues posed by the Future of Work. One unique question challenges the status quo – should organizational safety rules apply to employees when they are working from home? What should or should not change?

**Industrial Products & Construction Survey Demographics**

- A total of 332 IP&C respondents participated
- Over half of the respondents are from EMEA (59%)
- 63% of IP&C respondents are from privately owned companies and 33% are from publicly owned companies
- 61% of respondents work in HR
- Only 15% of respondents are part of the C-Suite. 40% work in Mid-level positions

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Energy, Resources & Industrials: Power, Utilities & Renewables

This year’s trends leverage findings from our Global Human Capital Trends survey with nearly 9,000 respondents from the Energy, Resources & Industrial industry in 119 countries.

This year, we focus on answering a paradoxical question: Can organizations remain distinctly human in a technology-driven world? Our Trends are grouped into the three attributes of the social enterprise: purpose, potential, and perspective.

- **185** total PU&R respondents
- Europe represents **62%** of the respondents, the largest representation, by continent
- Our respondent organizations employ talent from several sources, with **55%** using contractors, **29%** using freelancers or independents, and **14%** employing gig workers
- Nearly half of respondents, **47%**, identify as Mid-level
- Ownership is divided between privately owned companies, **49%**, publicly traded, **39%**, and other **11%**


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## ER&I Overall Highlights: Power, Utilities & Renewables

<table>
<thead>
<tr>
<th>Top Trends</th>
<th>General Key Takeaways</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Purpose</strong></td>
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</tr>
<tr>
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<td><strong>Beyond reskilling:</strong> Investing in resilience for uncertain futures</td>
</tr>
<tr>
<td><strong>Perspective</strong></td>
<td><strong>Ethics and the Future of Work:</strong> From “could we” to “how should we”</td>
</tr>
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<td><strong>General Key Takeaways</strong></td>
<td>With COVID 19 in the forefront of current events, promoting well-being has been emerging within this sector in small employee-focused programs. Even so, union standards of well-being, which are safety-focused, are still often the norm. If the industry can continue their focus on broadening well-being activities, workers may not only feel their best but perform at their best.</td>
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<td>In order to capitalize on advancements in technology, the PU&amp;R industry must make the equivalent investment in developing their workforce. Focusing on this effort is a step towards development and growth for employees and resilience for the organization.</td>
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<td>Ethical matters related to Future of Work in Power &amp; Utilities will be defined by organizational responses to individual worker rights, and the rapidly approaching impact AI and Automation's convergence with people will have on ethical issues. Respondents overwhelmingly believe organizations are responsible for managing these concerns, which calls for a more agile HR department to intervene.</td>
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To optimize workers across a changing landscape, well-being initiatives must now take into account vulnerable populations and areas of well-being within their workforce and be considerate of physical and mental health, as well as members of the alternative workforce. To lead this charge, leadership must engage those with intimate knowledge of team practices and incorporate well-being in new and innovative ways, as multiple shifts threatens distance individuals from the organization at large.

- 44% respondents claim that their organization says the well-being strategy focuses on the physical, mental, and financial health of our employees, thus promoting employee safety.
- According to 82% of respondents, well-being is very important or important.
- Organizations consider well-being a driver of organizational performance for 48% of respondents.
- The belief that HR is responsible for driving well-being within an organization is true for 37% of those surveyed.
- 56% respondents say well-being drives improvements in workforce experience more than any other factor.
- A strong majority of respondents, 98%, believe that well-being is an organizational responsibility.
Integrating Artificial Intelligence into the workforce is critical, as the dependency upon people should not inhibit the success of an organization, rather this integration should propel it towards the Future of Work. Implementing AI and automation more thoughtfully into teams, and reskilling where necessary, will demand more focused organizational involvement from HR to address an accelerated need to tailor solutions.

- According to 59% of respondents, the redesign of jobs to integrate AI technology is important or very important, however only 28% are ready or very ready to address the trend.
- When asked about the primary reason for AI use, 61% say it is meant to assist workers and will not replace them, while 53% say they are exploring or piloting ways of using AI, and 65% believe that number of jobs will remain same but the nature of jobs will change.
- Organizations report using AI to assist workers is limited and the focus is more on increasing consistency and productivity rather than on increasing value. Almost half (47%) of the organizations in our survey are ranked their top use of AI is to help improve consistency and quality, while 38% ranked their top use of AI is to boost productivity. Only 15% of respondents ranked that their organizations are using AI primarily to assist in developing workers.
- Only 15% are investing to support reskilling to boost organization's investment in L&D to support AI strategy.
Reskilling is becoming a necessity, and technological enhancement requires reskilling. Organizations unilaterally understand the growing presence of technology, and are realizing the need to engineer structures that can be engaged to utilize innovation that has not yet arrived. Organizations are admittedly presently unprepared to do this and will require an attentive and flexible HR to address unique concerns of individual departments and workstreams.

• Reskilling is important or very important according to 80% of respondents, but only 39% say they are ready or very ready to address the trend.
• When asked about changing roles, 36% percent of respondents said that half of their workforce will need to change their skills and capabilities in the next three years.
• The majority of employees, 80%, believe organizations as an entity are primarily responsible for Workforce development, alongside 60% who say workers and leaders in the organizations are not rewarded for developing their own skills and capabilities.
• Nearly half of respondents, 45%, say the difficulty in identifying development needs and priorities is seen as the organization’s greatest barriers to workforce development.
• 13% have been successful to a great extent in anticipating skills and capabilities needed to date, and 15% are able to anticipate the skills and capabilities they will need in the next three years.
Outside ethical concerns due to legal and regulatory demands, what other ethics considerations do you have as it relates to the Future of Work?

Ethical matters related to Future of Work in Power and Utilities will be defined by organizational responses to individual worker rights, and the rapidly approaching impact AI and Automation’s convergence with people will have on ethical issues. Respondents overwhelmingly believe organizations are responsible for managing these concerns, which calls for a more agile HR department to intervene.

- When asked if there are ethical concerns related to the Future of Work, 82% of all respondents said “Yes”.
- Workers are nervous about encroachment on the individual, and organizations are the least ready to approach challenges where humans and technology intersect.
- The most frequently selected ethical concern (58%) was maintenance of privacy and control of user data, followed by the use of AI and data to monitor individuals at the workplace (44%).
- Organizations are the least ready to manage concerns where control may be ceded to AI or automation.
- The use of algorithms to influence decision making is a pain point, where 40% of organizations are not ready to address this concern, despite it being of middling concern to respondents overall.
Notes From the Field: Power, Utilities & Renewables

With nearly 9,000 ER&I industry respondents in 119 countries, we have clients at every stage in answering a paradoxical question: Can organizations remain distinctly human in a technology-driven world? Do any of these stories resonate with you?

COVID-19 has accelerated the assessment of whether jobs are automatable, introducing ethical challenges while shifting into the Future of Work. Will leaders know how to upskill their workforce in this digital age?

COVID-19 has moved the attention given to employee well-being to forefront of organizational priorities and responsibilities.

Trends have shown that large organizations with flexibility are dealing with well-being changes more proactively whereas regional and smaller clients are not dedicating the same level of focus.

Organizations are more incentivized to invest in regulatory-supported technical training, but this may not be enough in this digital era.

COVID 19 has opened new possibilities, though. Remote work is leading to a larger geographical area of recruitment, targeting candidates who may contain the right skills needed to future-proof PU&R organizations.
Purpose

DESIGNING WORK FOR WELL-BEING

Living and performing at your best.

With COVID 19 in the forefront of current events, promoting well-being has been emerging within this sector in small employee-focused programs. Even so, union standards of well-being, which are safety-focused, are still often the norm. If the industry can continue their focus on broadening well-being activities, workers may not only feel their best, but perform at their best.

Potential

BEYOND RESKILLING

Investing in resilience for uncertain futures.

In order to capitalize on advancements in technology, the PU&R industry must make the equivalent investment in developing their workforce. Focusing on this effort is a step towards development and growth for employees and resilience for the organization.

Perspective

ETHICS AND THE FUTURE OF WORK

From “could we” to “how should we.”

Ethical matters related to the Future of Work in Power & Utilities will be defined by organizational responses to individual worker rights, and the rapidly approaching impact that AI and automation’s convergence with people will have on ethical issues. Respondents overwhelmingly believe organizations are responsible for managing these concerns, which calls for a more agile HR department to intervene.

PU&R Survey Demographics

- A total of 185 PU&R respondents participated
- 62% of the respondents are from EMEA
- 36% of PU&R respondents are from a medium business
- 62% of respondents work in HR
- 47% of respondents identify as Mid-level

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Energy, Resources & Industrials: Mining & Metals

This year’s trends leverage findings from our Global Human Capital Trends survey with nearly 9,000 respondents from the Energy, Resources & Industrial industry in 119 countries.

This year, we focus on answering a paradoxical question: *Can organizations remain distinctly human in a technology-driven world?*

Our Trends are grouped into the three attributes of the social enterprise: **purpose, potential, and perspective**

- A total of **129** Mining & Metals respondents participated from
- Over **half** of the respondents are from EMEA (**53%**)
- While **40%** of Mining & Metals respondents are from a medium business, the split is fairly even between the other size businesses
- **54%** of respondents work in HR
- Over **half** of respondents, **51%** identify as Mid-level

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## ER&I Overall Highlights: Mining & Metals

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The majority of respondents suggest that an environment where workers are treated fairly is very important to the success of an organization. The concept of belonging within these organizations is less dependent on community and interconnectedness and is more focused on an individual’s respect, fairness and autonomy within an organization.

Employees may feel more aligned with their organizations’ purpose and mission when they feel that they are being treated fairly. This may help drive overall organization performance. Creating and fostering a culture of fairness, however, is also a top down approach that respondents do not feel is prioritized by leadership.

83% of organizations say belonging is important or very important for their success, but only 11% say they are very ready to address this trend.

Respondent selected ‘Workers feel aligned with the organization’s purpose and mission and values’ as being the biggest driver of belonging (at 30%).

61% believe a sense of belonging greatly supports in driving organizational performance.
Is your well-being program holistic or only focused on occupational safety?

- For Mining & Metals organizations, people are working in mines across the world in less than ideal environments that are most often not intrinsically safe. It should come as no surprise that safety is the primary focal point when considering “well-being”. With a strong focus on physical safety, holistic well being, including mental well being, for example is not fully explored.

- Respondents believe that enforcing a well-being culture is at the hands of their leaders. However, only 26% of organizations are noting that their leaders are practicing and promoting their well-being strategy consistently.

- 80% of respondents identified well-being as an important or very important priority for their organization’s success, but only 13% say they are very ready to address this trend.

- While 35% of respondents stated that their organization’s well-being strategy focused on physical, mental and financial health, roughly 31% stated that the well-being strategy was only focused on managing occupation safety. 19% stated that they do not have a well being strategy in place.

- 47% of respondents have redesigned work to promote well-being at work by introducing specific “wellness behaviors” in day-to-day work.
Can you anticipate the skills and capabilities that will be needed over the next 3 years?

- Within the mining industry, there is a high need for adaptable skills for future roles. However, respondents believe that they have a limited ability to adapt to new roles requiring new skills.
- Beyond acknowledging the existing skill gap, the collective concern is how to mitigate this skill gap in order to keep up with ever-changing business needs.
- In addition to needing very technical skills for current roles, employees haven’t been able to meet their training needs to prepare for future roles.
- With the emergence of AI within the industry, 67% indicated that jobs that demand new combinations of technical and soft skills would increase. Yet 71% noted that their organization would primarily hire for new skills for jobs requiring these capabilities. For jobs that demand new, deep technical capabilities, organizations indicated that they are either outsourcing or hiring for new skills. None suggesting reskilling. This indicates an opportunity for organizations to increase investment in professional development training and reskilling.
- 79% of respondents identified reskilling as an important or very important priority for their organization, yet only 10% state they are very ready to address this trend.
- 23% of respondents are successful in anticipating their organizations’ skill needs to a great extent.
- Over 80% expect to either train current employees, hire new employees or move current employees to new positions rather than outsource the skills and capabilities for their organization’s needs.
How will you handle ethical concerns related to the Future of Work? Do you know what they are for your business?

- There is a large discrepancy worth investigating further, between overall importance versus readiness when it comes to ethics and Future of Work for mining organizations.
- Organizations are acknowledging the importance of ethics but have very limited knowledge on how to mitigate or approach such topics, particularly how it relates to employee data.
- 80% of organizations say ethics related to the Future of Work is important or very important for their success, but only 14% say they are very ready to address this trend.
- 89% think there are ethical concerns related to the Future of Work.
- 22% believe that their organization is not ready to manage concern around privacy and control of workers’ data, yet 76% think that the organization is responsible for managing this concern (instead of government or individuals).
- 89% think there are ethical concerns related to the Future of Work.
Notes From the Field: Mining and Metals

With nearly 9,000 ER&I industry respondents in 119 countries, we have clients at every stage in answering a paradoxical question: Can organizations remain distinctly human in a technology-driven world? Do any of these stories resonate with you?

Miners tend to form close-knit communities with each other yet feel a disconnect with their corporate colleagues. How can organizations bridge this gap in belonging? Is it worth the effort?

Well-being for Mining and Metal organizations has traditionally consisted of a focus on physical well-being and incident reporting; a priority that has existed for years.

With COVID-19 shining a light on mental health, Mining and Metals organizations are seeing more and more benefits to investing in a holistic well-being approach.

Training and retraining is an overall challenge for this sector. While there have been improvements on technology and related use, reskilling for the digital age in areas such as analytics, statistical modeling, interpreting data and translating data into solutions, do require more attention.
ER&I 2020 Human Capital Trends: Mining and Metals

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**Purpose**

**DESIGNING WORK FOR WELL-BEING**
Living and performing at your best.

It should come as no surprise that safety is the primary focal point in this sector’s scope of well-being. While there are opportunities for organizations to introduce and showcase mental health initiatives and discussions, this sector may also explore the incentive structure on reporting incidents.

**Potential**

**BEYOND RESKILLING**
Investing in resilience for uncertain futures.

It’s clear that the Mining & Metals sector feels challenged to reskill the workforce with adaptable skills required to keep up with the ever-changing, digital-focused future. With a greater investment and focus on the reskilling of workforce instead of outsourcing for skills, organizations may realize benefits to stay resilient.

**Perspective**

**ETHICS AND THE FUTURE OF WORK**
From “could we” to “how should we.”

Organizations are acknowledging the importance of ethics but have very limited knowledge on how to mitigate or approach such topics, particularly how it relates to employee data. As the threat of work, tasks, and information becomes more automated and digitized, executives might turn their focus on managing these challenges and mitigating ethical risks.

**Mining & Metals Survey Demographics**

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- While **40%** of Mining & Metals respondents are from a medium business, the split is fairly even between the other size businesses
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