

The background of the slide is a deep space scene. On the left, the curved horizon of the Earth is visible, showing a blue atmosphere and white clouds, with a bright sun or star behind it creating a lens flare effect. The rest of the background is a dark, star-filled field with numerous small, distant stars of varying colors and sizes.

HOW FAR CAN WE GO?
GLOBAL INDUSTRY TRENDS




OUTSOURCING SERVICES

presented by:

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COO



Key Points to Cover

- Outsourcing Services.....a view over 20 years
- 3 Key emerging and future trends:
 -  *The supply and management of talent*
 -  *Globalisation – The world's getting smaller*
 -  *The rise of the machine*

Outsourcing Services.... A View

- We've come a long way over the past 20 years
- We've continued to move up the value chain
- We've shown ability to adapt, survive and prosper

Outsourcing Services TRENDS

The Supply & Management of Talent



Globalization: The World's Getting Smaller



The Rise of the Machine





Supply & Management of Talent

The continuous supply of talent cannot be taken for granted

2 Key Points

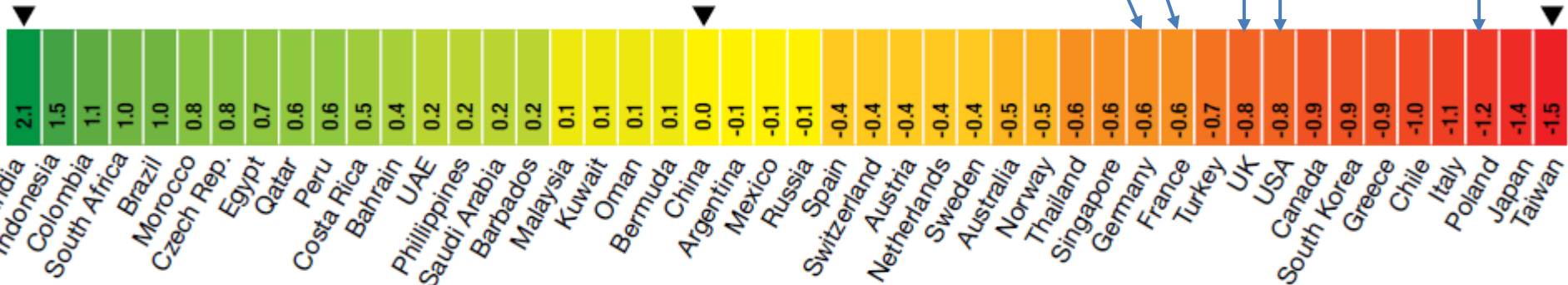
Need to think differently how we attract, manage and retain talent



The Supply & Demand Challenge

India
2.1

Strongest trend talent surplus



Fr & Ger
-0.6

UK & US
-0.8

Poland
-1.2

Strongest trend talent deficit

Source Oxford Economics

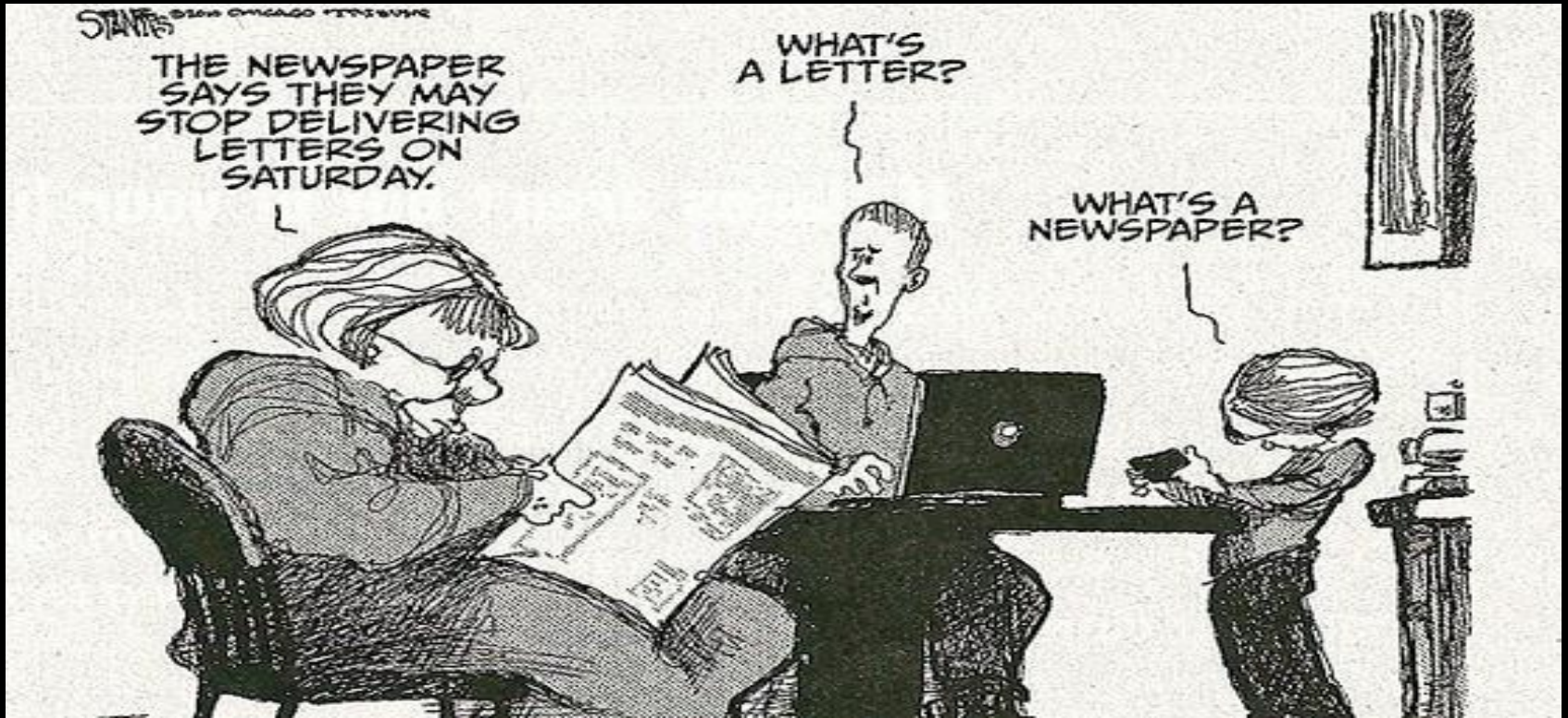
What are you doing on SWP, late in careers and new flex working solutions?



The Management of Talent

Clash Point	Traditionalists	Boomers	Xers	Millennials
Work/career goal	To build a legacy	To build a stellar career	To build a portable career	To build parallel careers
Reward system	Satisfaction of a job well done	Money, title, recognition	Freedom is the ultimate reward	Meaningful work
Feedback	No news is good news	Once a year is enough	"How am I doing?"	Comes at the push of a button
Changing jobs ...	Carries a stigma	Puts your career behind	Is necessary	Is part of my daily routine
Retirement is ...	A reward	Time to retool	Time off to renew	Recycling
Training	"I learned it the hard way; you can too."	"Train 'em too much and they'll take the new skills and leave."	"The more they learn, the more they stay."	Continuous learning is a way of life.

60% of all new jobs in the 21st century will require skills possessed by only 20% of the current workforce US DoE



Attraction, development and retention plans must respect the needs of each generation



Globalization: World getting smaller?

85% of the world's population can be found in emerging markets and they contribute almost three quarters of global GDP growth *Source World Bank*

By 2030, the global middle class will more than double in size, from 2 billion today to 4.9 billion most in emerging economies. The European and American middle classes will shrink from 50% of the total to just 22% *Source Brookings Institute & Reuters*



Anywhere Data – Anywhere Work

Gone are the days when employees wielded a simple set of tools to get work done. In today's world of anytime, anywhere work, employees use whatever device is most convenient – desktop, laptop, tablet, smartphone ...

Forrester

The workplace of the future is about a connected, enabled, empowered knowledge worker ... less bound by physical location or conventional work hours ... performance is judged more by quality of output than number of hours worked'



The Rise of the AI

‘Robots to replace third of UK workforce by 2025’
Deloitte / Oxford Martin School

‘Jobs paying under £30,000 a year are nearly five times as likely to be replaced as £100,000 roles’

‘47% of today’s jobs could be automated in the next two decades. How susceptible are jobs to computerization?’

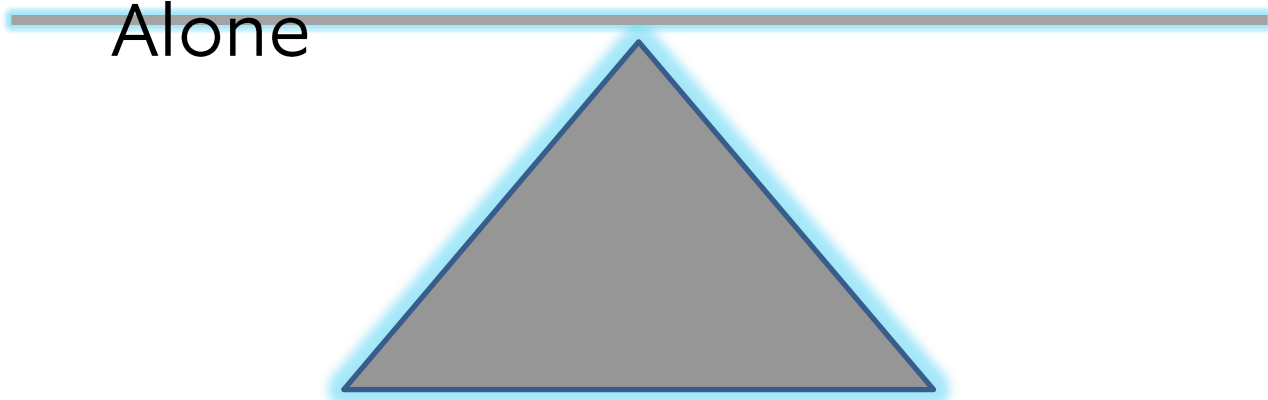


Rise of the Machine: Threat / Opportunity

Threat

Opportunity

Automation and Robotics
Alone

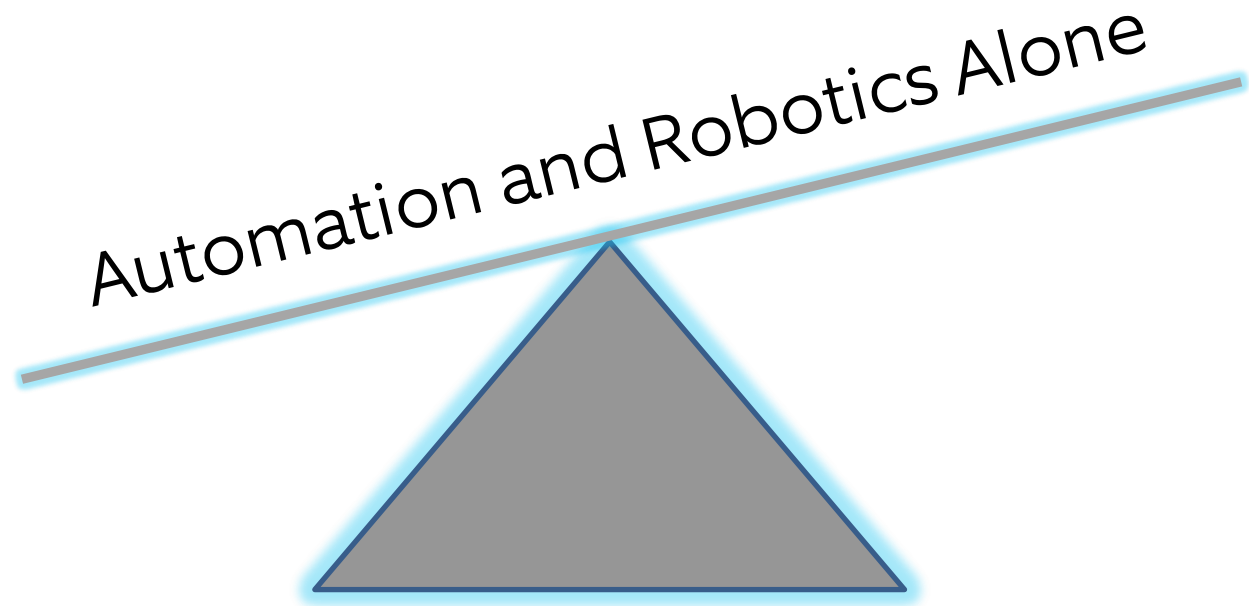




Rise of the Machine: Threat / Opportunity

Threat

Opportunity



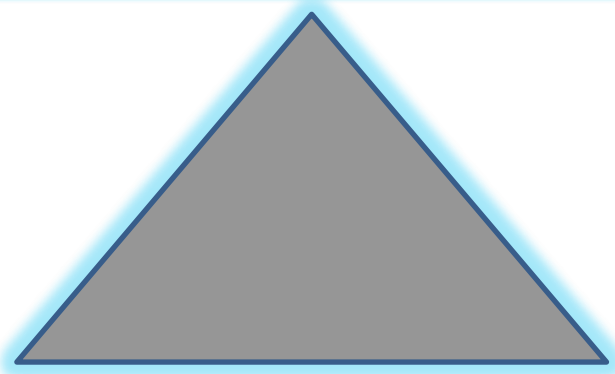


Rise of the Machine: Threat / Opportunity

Threat

Opportunity

Automation & Robotics + Projected Talent Supply
+ Globalisation Challenges



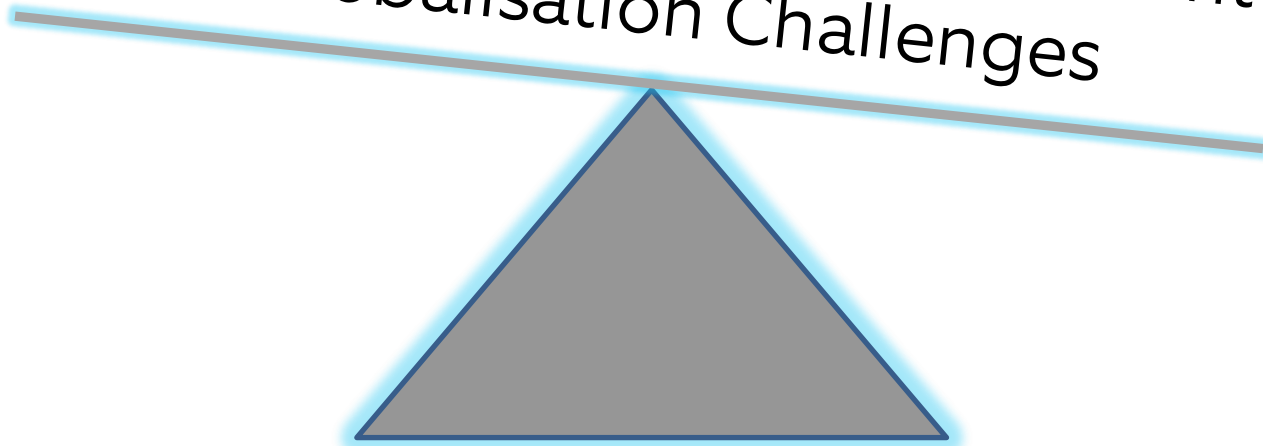


Rise of the Machine: Threat / Opportunity

Threat

Automation & Robotics + Projected Talent Supply
+ Globalisation Challenges

Opportunity





With Strategic Workforce Planning, Employee Engagement Programmes and Talent Acquisition & Management in place and operating.....

.....We can go further, if we embrace these trends as opportunities.....not threats.

THANK YOU