



THE FUTURE OF WORK IS HERE

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The Future of Work is here

1. Executive Summary

By stripping away bureaucracy, flattening hierarchies and streamlining processes, the response to COVID-19 has given us a glimpse of how work could and should change for the better. In fact, the pandemic is accelerating ongoing changes in the nature of work, who does it and where. 61% of executives asked in a recent Deloitte survey indicated to focus on re-imagining work in the next three years (from 29% prior to the pandemic)¹. The profound shifts we are seeing are proving to be productive for many and painful for others, potentially exacerbating existing inequalities. That is one of the high-level conclusions from this discussion paper which draws on interviews with 26 business leaders, policy-makers and researchers, based on Deloitte's expertise on the Future of Work.

Here are our key findings:

Call for greater trust and faster decision-making

To enable organizations to prosper in a fast-moving and unpredictable environment, some of the interviewees called for a new kind of leadership based on mutual trust and a shared sense of purpose across employers and employees. Rather than simply dictating changes to employees, leaders need to become more

transparent and consultative, to sustain the flatter hierarchies and faster decision-making that have been hallmarks of organizations' immediate response to the COVID-19 crisis. Such a shift would need to be underpinned by a change in the way organizations define and measure 'good performance', placing greater emphasis on outcomes, rather than inputs, and employee well-being. Organizations should identify the optimal workforce for a specific task (be it workers on payroll or flexible

talent) and then design a bold, engaging and inclusive employee experience.

Businesses now compete on how quickly they can exchange information and make meaningful decisions. If they attempt to return to the old work regimes, they will risk losing good young people and market share to more forward-looking competitors. If they don't adapt to the future of work, businesses will lose the talent war and ultimately die.

Individuals will need to invest in their futures

For their part, individuals will need to invest in their own development and be prepared to move from employer to employer as greater automation closes down some roles and opens up others. A university degree will no longer be enough to guarantee continued employment – people will need to develop their innately human skills, while keeping their digital acumen up-to-date. For white-collar workers, a well-equipped home office with reliable, fast connectivity is now an absolute must.

The response to the pandemic has demonstrated that a distributed workforce can use digital tools and connectivity to function effectively, opening opportunities for employers to recruit from a broader and more diverse and dispersed talent pool. Even so, businesses should work with governments to enable more people to develop the adaptability and soft skills they will need to be employable and productive in a world in which machines and computers take on more and more responsibilities. As technology takes over many traditional work tasks, organizations will have to rethink what they pay employees to do.

A new purpose for offices and office workers

Yet, the shift to distributed working will also require organizations to double down on their efforts to create a shared sense of purpose among employees. Without that, there is

a danger that people will lose their sense of belonging and cohesion will suffer. To prevent that from happening, businesses should overhaul their office and technological capacity to support the optimum mix of distributed working and in-person collaboration in physical workspaces. Although many interviewees noted how productive people have been during the pandemic, some also flagged signs of fatigue and frustration with remote working.

To help people find a better balance between digital and in-person interaction, offices should be revamped to become collaborative spaces where staff mingle to exchange ideas and brainstorm, fueling innovation that will give the business a competitive edge. It is important to allow for the serendipity of interaction, while harnessing the broader benefits of distributed working, such as reduced commuting time, less congestion and a better work-life balance for staff.

Governments need to step in and step up

Although the progression of technology is impacting almost all kinds of work, some groups of people are better able to cope than others. As a result, society is segmenting. Some interviewees pointed to growing political, social and economic inequality, as people get disconnected from work and become increasingly unemployable. Given the fundamental importance of connectivity and digital tools in the new world of work, governments need to move now to narrow gaps between the technological

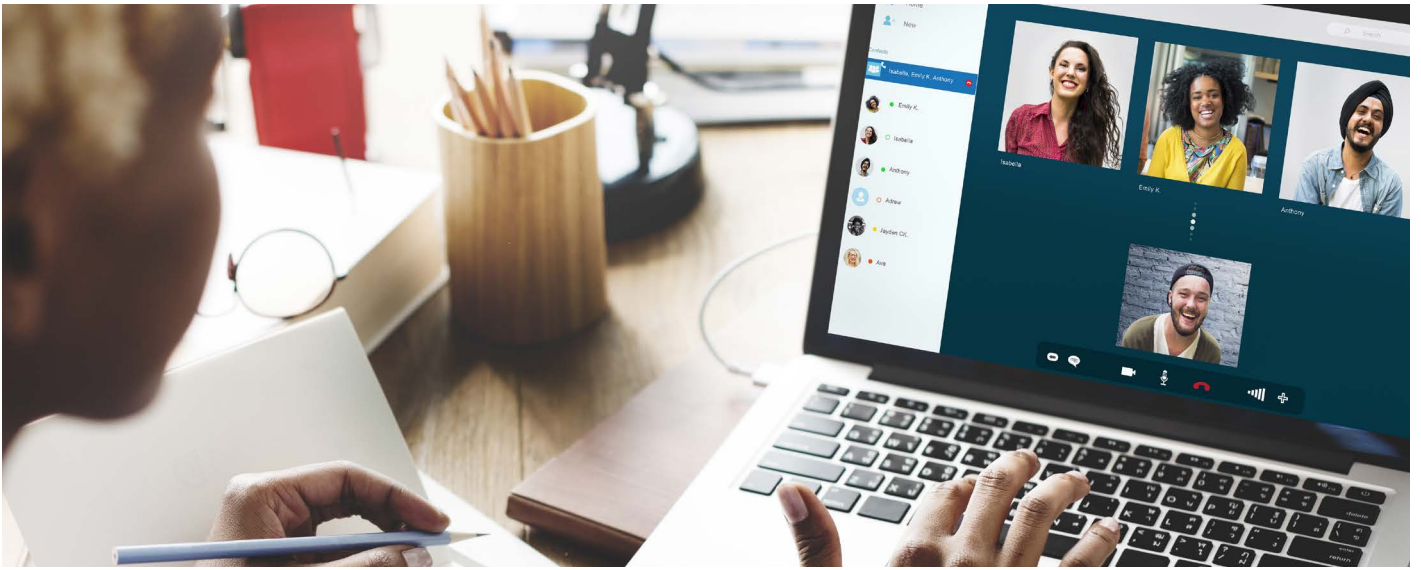
haves and have-nots. Meaningfully closing the digital skills divide will be impossible without greater government investment.

Setting a direction of travel

As well as capturing many of the ways in which work is clearly changing, this discussion paper identifies multiple topics where there are divergence of views. The impact that we will all face in the change is not yet well defined and set in stone. The leaders of the businesses and institutions that were interviewed do recognize that actions have to be taken to catch on to the current reality. Aligning the work, workforce and workplace in a completely new setting with different rules and cultural aspects is a huge task. In this respect, the paper will help frame the ongoing debate among private and public sector stakeholders about how we should organize work going forward. The outcome of that debate will have enormous ramifications for individuals and society as a whole.

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3. Introduction

About this paper

Drawing on interviews with 26 business leaders, policymakers and researchers conducted in the final two months of 2020 and Deloitte's expertise and experience, this paper explores the future of work – a hot topic for governments and organizations across the world. Synthesizing insights from the interviews with a theoretical backbone, the paper considers how the nature of work is changing and the implications for the workforce and the workplace. It then explores the critical role of connectivity and technology, before drawing conclusions for businesses, individuals and governments.

This discussion paper is designed to trigger debate about the organizational changes that everyone is working through today. The interviews tested hypotheses around a major shift in the way we work, driven by a changing society and greater worldwide connectivity, data and automation. Such a shift would go well beyond the recent rise of the global gig economy and rapid growth in the number of self-employed. In line with this theme, we have sought to answer some thought-provoking questions, such as:

- Will office workers continue to work from home, even after the pandemic?
- Will a hybrid working environment lead to a more international workforce and create more diversity?
- Will the shift in the patterns of work open up new opportunities in the value chain and allow for new business models?
- Are we about to see a great leap forward in the digitization of work? If so, how should governments and businesses ensure the workforce have the right skills?
- Is there a risk that remote workers become alienated from their organisations, losing their sense of belonging?
- Will companies' headquarters completely disappear changing the face of city centres?
- Are we in danger of creating a two-tier society in which people with the right mix of skills are in great demand, while many others are almost unemployed?

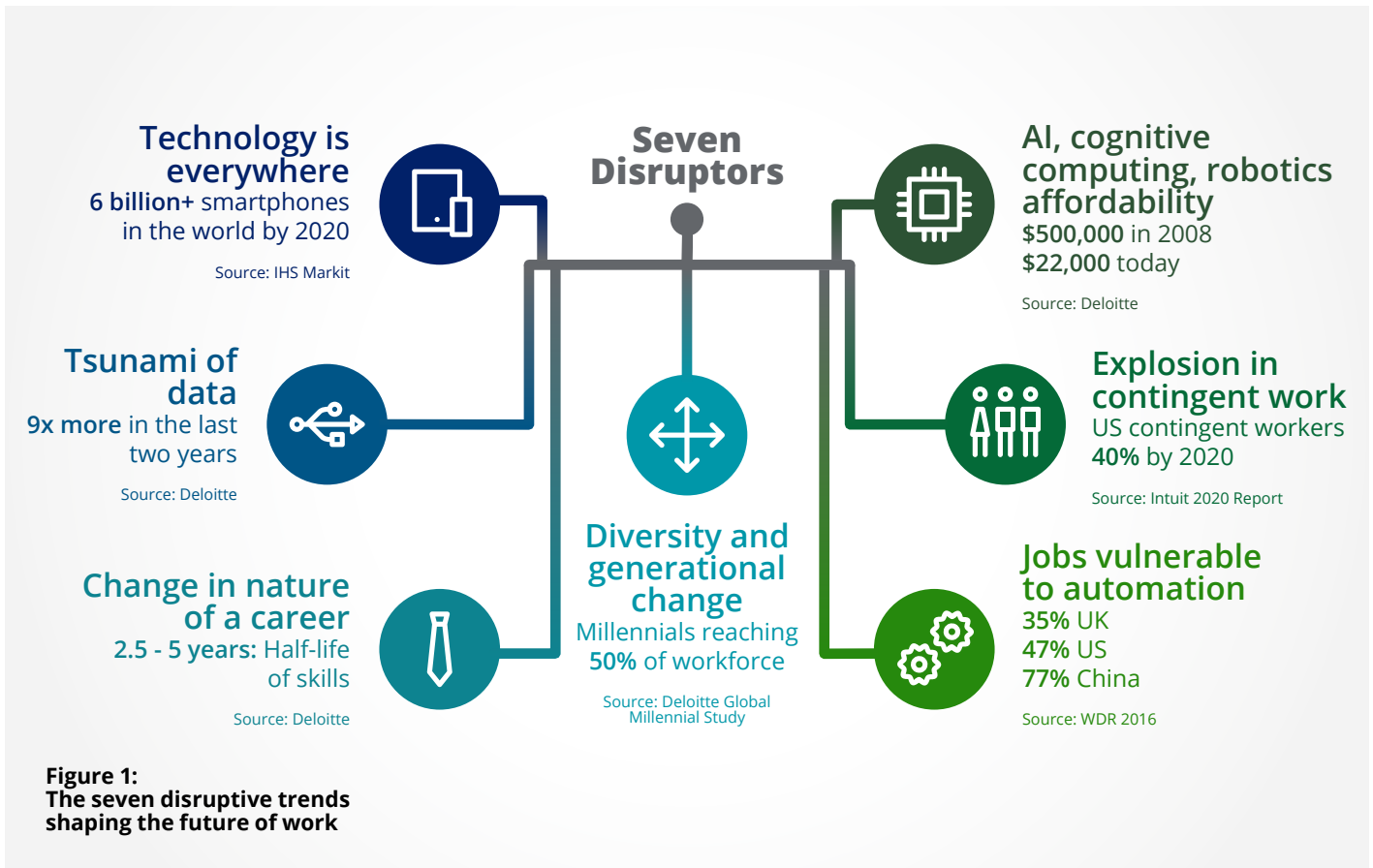


Figure 1:
The seven disruptive trends shaping the future of work

The past is a foreign country

These questions may not be keeping us awake at night just yet, but the forces shaping the future are already at play and we cannot afford to be caught off-guard. Although there are many uncertainties to be resolved, it is clear that work is changing fundamentally – we won't go back to a traditional hierarchy-orientated office life, partly because younger employees would resist such a move. Yet most employers are not ready for a wholesale democratization of work.

We believe trends should not be considered in isolation. Technology and demographics are connected: if technology takes over tasks now performed by people, what uniquely human skills will become more valuable? If the global workforce will become more diverse, how will leaders need to adapt? More flexible work arrangements could have profound

effects, not just on how we work, but where we work, how we communicate and even on how cities are designed.

The COVID-19 pandemic has, perhaps, given us a kaleidoscopic glimpse of the future of work – such as in the case of the industrial equipment maker ASML pioneering new uses of augmented reality technology². But the crisis has also prompted a change in direction for others, such as retailer Walmart pulling back from replacing human workers with robots³.

Although this paper does consider the role of COVID-19 as a contributing/accelerating factor towards some of the changes, it is primarily concerned with the emerging societal, technology and connectivity trends that are yet to radically disrupt our work. As such, our aim is to take a holistic approach and build a directional view on decade-long trends.

Trends shaping the future of work

Earlier Deloitte research identified seven disruptive trends that are shaping the future of work (see Figure 1). These trends can be grouped into two categories: socio-demographic trends and enabling technology trends. For example, the diversity of the workforce is increasing as we live longer and hence work longer⁴.

At the same time, the concept of a career is changing: employees increasingly find climbing the corporate ladder less appealing⁵, preferring project work and cross-functional moves, as well as self-employment and freelance work. These shifts are compounded by the expansion in connectivity, which is generating heaps of data and boosting the development of artificial intelligence (AI), cognitive computing and robotics.

Naturally, we cannot ignore the effects of the COVID-19 pandemic on these trends. It has clearly accelerated digitization of organizations and has had a significant impact on contingent workers, especially where employment laws don't provide sufficient support. The global lockdowns in response to the pandemic appear to have delivered the future of work to many of our doorsteps. While the longer-term effects are still uncertain, our research and interviews with experts point to profound change ahead.

The three key dimensions: Work, Workforce and Workplace

This paper considers three dimensions: *Work, Workforce and Workplace*.

Work looks at the changes in the nature of work itself – a worker's day-to-day tasks. What work will be done in the future and how will it be done. Automation and advanced technologies are changing day-to-day tasks and, therefore, the required skillsets.

The *workforce* dimension considers *who will be doing that future work*, both in terms of the nature of

workers and their requirements. The changing nature of work will change the composition and expectations of the workforce. Technology and connectivity will be a double-edged sword: on the one hand, they have the potential to break down barriers across geographies, languages and backgrounds, while on the other they can also sharpen and widen the social divide between the digital haves and have-nots.

The COVID-19 pandemic has thrown a spotlight on the *workplace and its future*. With factory workers faced with the risk of contagion, office staff working from home and storefront businesses struggling with ever-evolving pandemic regulations, organizations are rethinking the purpose of the physical workplace.

The following chapters will zoom in on each of the dimensions. [Chapter 7](#) then provides an overview of the role of technology and connectivity, before [chapter 8](#) draws conclusions for each stakeholder group.

The three key dimensions



Demand for **technical knowledge**, such as **AI skills**



Need for **reskilling** and **upskilling**



Combining **human** and **technological** capabilities in the optimal way

4. Work



Prepare for a dramatic change in day-to-day tasks

What will work look like in the future? This chapter explores how the tasks performed by workers are changing and the ramifications for skillsets and for society: Will more digital tech mean more inequality, as more and more tasks are automated?

Although the changes described in this chapter predate the pandemic, COVID-19 is accelerating a shift in the nature of work, by forcing the digitization of tasks that had been performed in-person⁶.

How technology is upping the pace

Technological advances are enabling the automation of repetitive tasks and processes, allowing workers to focus more on creativity, human

experience and innovation. At the same time, technology is changing the way we execute our work, generally augmenting our human capabilities and enabling us to complete tasks faster.

It isn't a bed of roses however: technology can also inhibit productivity, for example if it has been poorly designed or because people don't know how to use it (or both).

- Many skillsets are becoming less relevant or even obsolete
- Organisations will look to employ people with capabilities that can't easily be replicated by technology



“The human factor shows it takes behavioral change and, therefore, time for people to catch up to where technology is today. This prevents optimal translation of bleeding edge technology deployments into raw productivity.”

Martijn Roordink
Founder of Spaces

Andrew Bartels, Vice President and Principal Analyst at Forrester⁷, pointed to data that shows that rising technology investments have ceased to result in a proportional increase in productivity, while other interviewees also highlighted the time it takes for people to adjust to new technologies.

The unpredictable pattern of the pandemic has also prompted changes in organizational structures and collaboration, according to some interviewees, who flagged the need for faster decision-making and innovation. As a result, there is an apparent move towards flatter hierarchies. Jennifer Vink, Head of Enterprise Sales at Google Netherlands, noted how one “would be surprised how many good ideas come from juniors and not from seniors.”

Yet, the increased pace may be unsustainable. One interviewee

described it as “exhausting”, adding: “Productivity is up, but so is fatigue. Mental health, work-life balance and the home office are true concerns that have to be dealt with. Communication has become more formal with shorter meetings and extreme information density.” While enabling interactions to be more efficient and transactional, technology is giving people less time to relax and reflect. For white-collar workers who pack their days with Zoom calls, there is less scope for the small talk and personal conversations that oil the wheels of in-person meetings and build relationships between colleagues.

As meetings move online, they can accommodate more people than physical rooms. That can have both positive and negative impacts. While facilitating employee engagement, there is a risk that staff attend virtual meetings they don’t need to join. In the meetings themselves, the

weight of numbers may mean more presentations, less discussion and fewer decisions.

The search for innately human skills

As the nature of work changes, the skillsets required by the workforce are changing. Many skillsets are becoming less relevant or even obsolete at an accelerating rate⁸. As you would expect, demand for technical skills is changing rapidly, leading to skill shortages in some disciplines, such as artificial intelligence: 23% of AI-adopting organizations report a major gap between supply and demand of AI skillsets⁹. Organizational leaders now need sufficient digital knowhow to anticipate and mitigate such challenges.

As the half-life of technical knowledge is continuously falling, it is hard to predict exactly which technical skills will be required going forward. Organizations are increasingly prioritizing ‘soft skills’, such as adaptability, resilience and an appetite for life-long learning¹⁰. Toby Peyton Jones, who has a portfolio of roles including Non-Executive Director for the Institute for Apprenticeships & Technical Education and Ambassador for Siemens UK, noted that these soft skills are very unlikely to become obsolete. If anything, they are becoming essential for navigating in a fast-changing world.



of AI-adopting organizations report a major gap between supply and demand of AI skillsets

“Serendipity interactions, which are crucial for innovation, are missed in virtual ways of working. Even though new technologies are created to replace these kind of interactions I question if this will be a solution as they fail to engage the emotions in a way that is so integral to face-to-face encounters.”

Toby Peyton-Jones

Non-Executive Director in the Tech and Education Sector



As organizations become increasingly automated, they will look to employ people with innately human capabilities that can't easily be replicated by technology¹¹, supplemented by digital literacy. As a consequence, a move towards multidisciplinary skillsets could become the norm, fueling out-of-the-box and cross-discipline thinking, creating agility and supporting interchangeability of skills and roles, according to Toby Peyton-Jones.

As leaders and teams collaborate in new ways (more virtual, more dispersed) and as organizations pursue agility, they will define and measure 'good performance' differently, placing greater emphasis on outcomes¹². Jennifer Vink of Google noted that transparency and a flat hierarchy can stimulate a culture of innovation.

Beyond reskilling towards lifelong learning and resilience

Our research and interviewees suggest a need for significant upskilling and reskilling of segments of the workforce. Secondly, an increased focus on lifelong learning: helping workers to re-invent themselves and thereby become resilient to changing context. Soft skills, especially people skills and the ability to effectively acquire new knowledge, can act as a fix point in the midst of a fast-changing environment, as reported by Deloitte in the Human

Capital Trends Report 2020¹³. As jobs disappear and new ones appear, internal mobility for outplaced workers will also be crucial.

Upskilling and reskilling are likely to be a shared responsibility between the employee, the company and, to some extent, governments¹⁴.

Technology will be part of the solution. As technology and connectivity become increasingly embedded in our daily lives, they can make lifelong learning and skilling available to more and more workers. Connectivity enables collaboration, knowledge sharing, and learning to be embedded in the flow of work and in the work technologies. However, some interviewees cautioned that technology and connectivity cannot provide a full substitute for face-to-face co-creation, collaboration and innovation.

The deliberate redesign of 'work' and new forms of leadership

Society, organizations and workers themselves are not generally equipped to deal with continuous change. Workers and organizations may find themselves in an intricate web of technologies and point solutions that don't save time but may in fact lead to frustrations, workarounds, and detrimental behaviors.

While the ultimate impact of technology on workers is unclear, one thing is certain: leadership itself will have to undergo a profound change. Leading by example, senior managers will need to embody the change desired for their workforce. As discussed in the next chapter, new habits and a transformation of leadership will be required to enable true organizational agility.

The challenge is to combine human and technological capabilities in the optimal way. As they re-architect work itself and measure employee performance in terms of outcomes, rather than inputs, organizations will find they have more freedom. As technology helps to strip away restrictions, they can focus on what they really want human beings to do with the time they spend working.



Leadership has to change and **trust** will be crucial



Ensuring employees' sense of **belonging** and **engagement**



Need for **adaptation** and consistently **learning** new skillsets

5. Workforce



Tapping a diverse and broad talent pool

Who will do the work of the future? As work changes, skills need to change. Building on the analysis of how work is changing in [chapter 4](#), this chapter explores how the relationship between organizations and their employees is evolving, what that means for staff motivation and loyalty, and what organizations can do to build a fully engaged and effective workforce.

When we embarked on this research, one of our hypotheses was that the workforce will become significantly more international and diverse: technology is enabling people to work where and whenever they want (within some organizational limitations). As a result, individuals could have access to jobs that may have seemed impossible before. Accurate speech recognition software could help some disabled people, for example, to take on new

tasks. For employers, there is the potential to dip into a much broader and more diverse pool of talent both at home and abroad. Tomasz Rudolf of The Heart (center for corporate start-up collaboration) notes that as remote work becomes mainstream, it opens up opportunities “to leverage an uberized workforce from local markets.”

- **Increasing pressure on organizations to become a 'social enterprise'**
- **Organizations need to pay extra attention to workers' mental and physical well-being**



“The Future of Work debate has accelerated the shifts already underway: balancing how, when and where we work most productively with the demands of our home lives. At Liberty Global, we are listening and learning. If one thing is clear, it’s that this moment is of equal importance to employers, employees and new talent considering how and where they want to work. Clearer still is the need for open dialogue, a thoughtful approach and the shared will to build on everything we learned during COVID-19 about the way we work.”

Amy Blair
Chief People Officer, Liberty Global

In theory, at least, organizations will be able to recruit workers from all over the world. However, in practice, there will be major cultural and linguistic obstacles. Further, the uneven distribution of technology and connectivity could undermine governments’ and businesses’ efforts to boost diversity and inclusion.

From performance to purpose

Even today’s workforce is far more diverse than its predecessors: both in terms of age and background, as well as type of employment contract. That has given rise to a more diverse set of expectations towards employers. Young people, in particular, expect to spend their careers with multiple organizations, shifting from company to company to create a set of ‘employment experiences’.

Employees are increasingly looking for purpose and not just a brand to work for. The increased worldwide connectivity and transparency provided by digital services, such as LinkedIn and Glassdoor, are putting pressure on organizations to become a ‘social enterprise’. That means a greater emphasis on culture, employee well-being and diversity & inclusion¹⁵.

Workers increasingly expect organizations to respond to society’s biggest issues, such as climate change, inequality, diversity and health care. Some interviewees argued that a workforce imbued with a shared purpose will eventually deliver a better business performance. “Employees need to feel connected to the organization, they need to feel a common purpose,” stressed Jeroen Lokerse, Head of Cushman & Wakefield Netherlands¹⁶.

Indeed, some businesses are hoping that a shared sense of purpose will build staff loyalty, as opposed to the idea that the next generation of workers will hop from company to company. “At VodafoneZiggo we try to reduce the contingent workforce - we want people committed to the purpose of the organization and have a cultural fit, as that enables them to collaborate well together,” said Thomas Mulder, Executive Director HR, VodafoneZiggo.

However, individual workers will have different views on what purpose means for them. Recognizing the complexity of this topic, organizations will need to build a deep understanding of workers’ drivers and needs.



“The problem is the expanding inequality on all levels: politically, economically and socially. People get disconnected from society. Groups are forming which are dissatisfied on many levels. It’s we against us. There is no bigger ‘us’ anymore.”

Peter van der Maas
Program Lead for the OECD Institutions for Open Societies and Future of Work

From monitoring to trust

As discussed in the previous chapter, organizations are moving to a more flexible performance evaluation model that is outcome driven¹⁷. Accelerated by COVID-19, this trend reflects the growing flexibility in work schedules and locations (see next chapter on workplaces), as the workforce moves away from the 9-5 routine and looks to design the workday around other responsibilities¹⁸. For these new models to work, leadership skills will need to change to manage a highly distributed workforce – learning when to trust will be crucial.

Indeed, the changing role of leadership was a theme that ran through many of our interviews. Building and infusing trust in the organizational culture is key in a world where managers don't always see work physically being performed in front of their eyes. The net result could be a flatter, less hierarchical, organizational structure. As workers are given more independence and leeway, interactions between leaders and their teams could become less formal. If the organizational culture allows, junior staff could become a source of valuable new ideas. To that end, leaders

need to rethink how they measure performance and embed trust in the organizational culture – for that, new habits will be needed.

Flatter hierarchies, faster decisions

Reflecting on the early weeks of the pandemic, some interviewees noted a surge in innovation due to better collaboration and corporate flexibility, with COVID-19 bringing a new sense of what is possible when stripping away red tape, bureaucracy and long processes. There was a greater effort to collaborate within the organization, as well as in the ecosystems and value chain to simply get things done, coining the term 'speed over elegance'. At the same time, there was a shift to more independent working for many workers during the pandemic¹⁹. Ensuring that these new habits continue post-pandemic will be important, as rapid innovation will be required to remain competitive.

Indeed, organizations need to grasp that C-suite leaders can no longer simply dictate changes that their employees don't support. Instead, they will need to earn their employees' trust and,

conversely, they will need to trust their staff. In the absence of two-way trust, businesses will end up back with the outmoded workplace of old and losing ground to rivals that are reaping the benefits of more innovative, dynamic and distributed processes.

Ensuring workforce well-being and belonging

A more flexible work model will surely impact employees' sense of belonging, engagement, and overall well-being, according to several interviewees. In the longer term, employees' sense of engagement and belonging may weaken as they miss connection and social cohesion²⁰. Even though work can be done from anywhere and the majority of the work does not need to be executed in proximity to co-workers or the office, our research suggests that face-to-face interactions will remain critical (see next chapter for more on this).

Social bonds can help people feel like they belong. Building such bonds will require organizations to enable interaction and social behavior that fits with flexible working patterns. To attract and retain the talent they need, organizations will need to become adept at bringing together employees from various backgrounds, becoming a community or aggregation of communities. As they try to build an inclusive culture, organizations may need to pay extra attention to workers' mental and physical well-being. To attract the best talent, organizations will also need to listen to employees' views - bringing the voice of the workforce to the fore.

Societal shifts threaten to widen the economic divide

Our research for this paper tested the following hypothesis: although the majority of the workforce in developed



72% of executives believe that re-skilling is important to overcome future disruptions



17% of executives say their workers are ready to adapt, reskill and assume new roles



“How about the people who don't have the skills (data, network management etc.), what happens to those? The people who work 8-5 on commodity jobs and those who can't handle ambiguity, we will lose them or their career path ends early. Continuously re-skilling is very important now and more so in the future.”

Sven Semet

Business Development Director and Thought Leader, IBM Watson

countries will be able to adapt, a minority will struggle to remain employable, resulting in significant social and economical upheaval. This contention resonated with some of our interviewees, who flagged the real danger of a two-tier society.

Although the progression of technology is impacting almost all kinds of work, some groups are better able to cope²¹. As a result, society is segmenting. People involved in physical labor (the traditional 'blue-collar' category) often experience the most upheaval²². Physical work is essentially 'moving upstream', involving technology that oversees and orchestrates machines. For many blue-collar workers, the strict delineation between personal and professional time may blur, as machines work around the clock. Indeed, 72% of executive respondents in the survey for the recent Deloitte's Human Capital 2021 trend report believe that re-skilling is important to overcome future disruptions, while only 17% of workers are ready to adapt²³. In fact, there will be a growing number of job vacancies, as employers struggle to find people with the right skillsets to enable organizations to apply technology effectively. Far more than an inconvenience, a wedge between supply and demand could increase

the social and economic divide, widening the gap between the 'haves' and 'have nots'.

Even if 60% of workers themselves recognize the imperative to change²⁴, the challenge for society will be to keep individuals on board who may not be intrinsically motivated to consistently learn new skillsets or who are simply not given opportunities to do so.

Policymakers will need to intervene

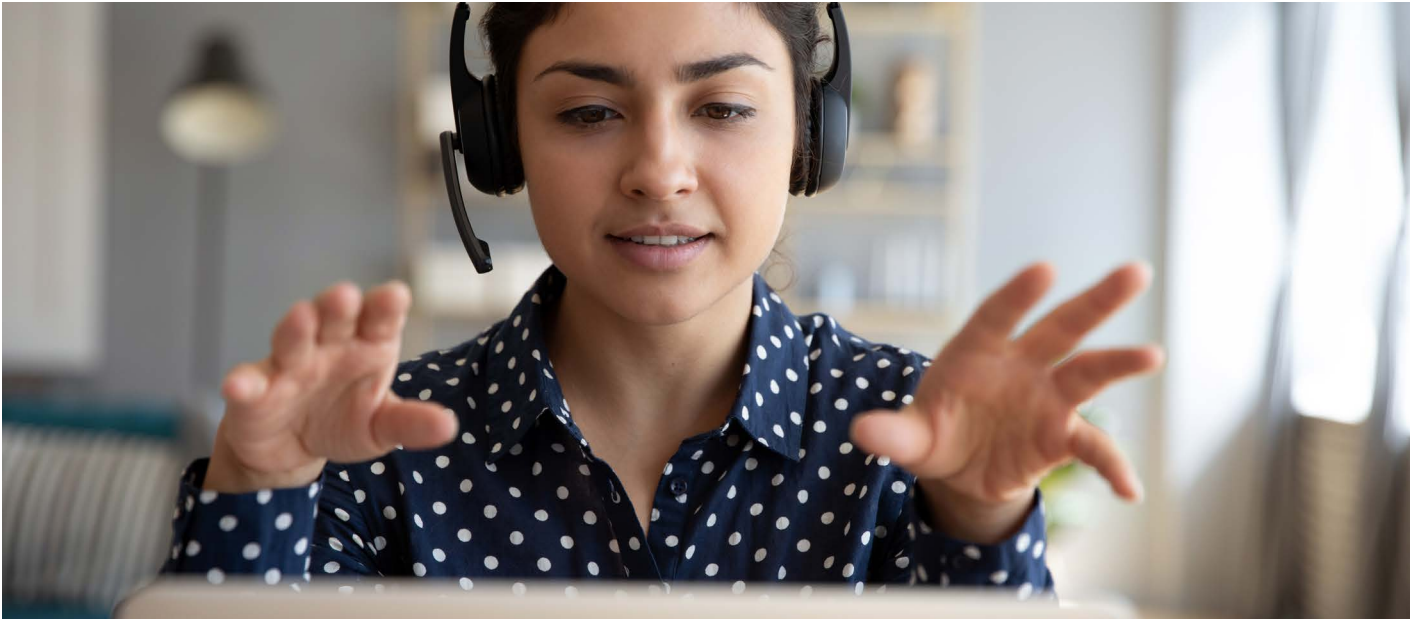
Governments and businesses will have to work together to narrow this divide. Governments need to start thinking about how legislation and taxation should evolve, above and beyond the immediate reaction to current (pandemic) trends. Peter van der Maas called for greater awareness of this issue among policymakers and business owners, while Stefan Olsson, Director Employment at the European Commission, warned that the accelerated speed of change means it is very unlikely that the newly unemployed will be able to get the necessary skills fast enough to take up new jobs. “If this happens over generations/decades - it's fine, but if the adjustment is over a span of a year it becomes more difficult,” he added. Alert to this issue, the Commission and EU Member States are beginning to intervene ([see chapter 8](#)).



“We all miss the social interaction, the group meetings, the creativity, free-flowing information exchange. For senior executives, it's easier to work remotely. For juniors, it's difficult to see what's going on in the rest of the company and explore other opportunities.”

Manuel Kohnstamm

Chief Corporate Affairs Officer, Liberty Global



More **remote working** significantly decreasing the **daily commute**



Employees' need for **physical presence** and **togetherness** will persist



Change in purpose of **the office** as **hybrid work models** become popular

6. Workplace



Redefining the role of physical space

Where will we work in future? This chapter explores how the changing nature of work will impact the physical workplace. It considers the role of the office and how it could be revamped to better meet the requirements of both organizations and employees, while examining the implications for where people live and for cities and suburban areas.

To really harness and develop the people and collaboration skills discussed in the previous chapter, organizations are likely to need a new kind of workplace. In our interviews, we tested the hypothesis that businesses will reduce their real estate portfolio and make greater use of multipurpose/flexible locations, such as high-tech collaboration services and community-building facilities

Calling time on the commute

The response to the COVID-19 pandemic has revealed that a remotely connected, digital workplace is a viable solution for companies to keep operating, and a feasible alternative to the traditional office space, at least in the short-term. Indeed, the pandemic triggered remote working at scale, dramatically accelerating an existing shift (38% of the Dutch workforce, for example, was working from home in

- Office space is an important location for creativity, innovation and social cohesion
- Organizations have a diverse set of options for reshaping work and living locations



“The biggest shift with hybrid working is that it becomes about you as a member of your team(s). This means you work together when, where and how is most effective for you as a team. To make the new policy a success we need to ensure a level playing field to make people feel included. Also, clear guidelines need to be in place about office attendance.”

Thomas Mulder
Executive Director HR, VodafoneZiggo

June 2020²⁵). Some interviewees noted that more distributed working is yielding benefits for society, in terms of reduced congestion.

The crisis now looks set to have a lasting impact on businesses and employees around the world. A US census study found that 34% of surveyed workers expect to never return to daily commute²⁶, while a Deloitte study of the financial sector shows that 77% of people surveyed expect to work from home office regularly after the pandemic²⁷.

This shift isn't inevitable. In a Deloitte survey of almost 4,000

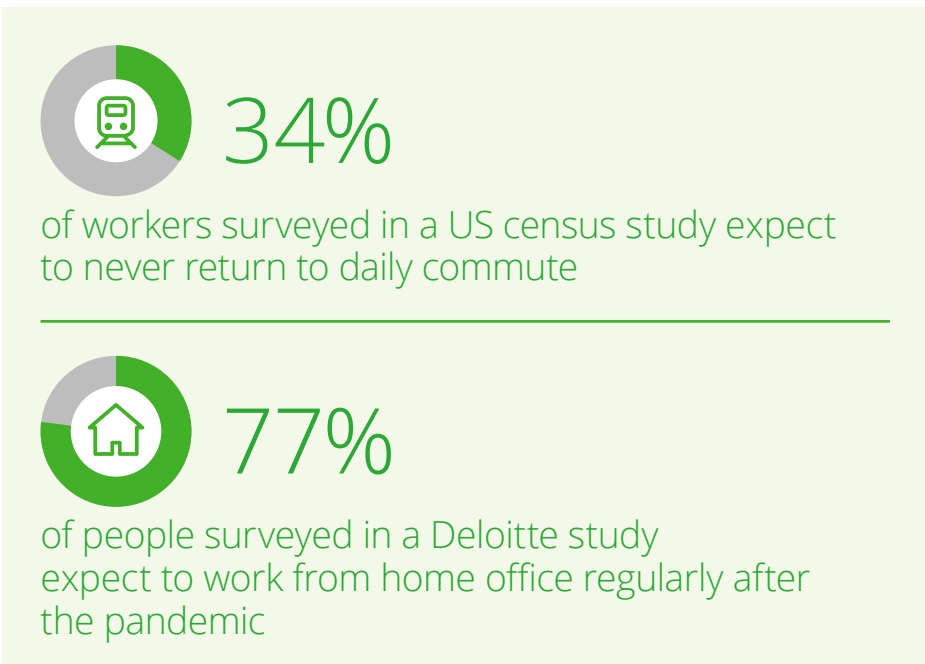
European consumers in May and June 2020, opinion was divided on whether working from home is a good thing – 33% of respondents said it is easier to work from home, while 34% said it is harder. Whether workers do want to return to the office en-masse may be governed by a herd mentality.

Further, it is becoming clear that some manual work can be done digitally and even remotely. For example, fully automated production lines within the automotive industry are now being monitored and calibrated by human workers via tablets and computers with no need for a physical presence.



“At an industry conference - everybody goes because everybody goes. There's a similar ethos in the office. If I make the investment to go travel for two hours, I want to see people. If I don't see half the people I want, next time I'm not going to bother. You eventually hit a negative spiral.”

Paul Lee
Global TMT Research
and Insights Expert, Deloitte



“We are entirely reshaping the working floors. 60% of space will be collaboration space. We have hot desks for the rest. Clearly one of the challenges is retail, where we don't have the flexibility to work remotely.”

Robert Redeleanu

CEO UPC Central & Eastern Europe



To be sure, many forms of manual work, such as construction, cleaning and waste collection, can't yet be detached from the physical workplace.

A recent McKinsey study highlighted that about 50% of the workforce has little or no opportunity for remote work. You can argue about the number, but not the fact that remote or hybrid working will remain unattainable for a large portion of the workforce. In the long term, technological advances might address some of the obstacles, but there is unlikely to be significant change in the next five years. Given this constraint, this chapter focuses primarily on where office work will be conducted in future.

There is a time and a place for remote working

As the pandemic forced most office workers to relocate their working space to home, both the benefits and limitations of this remote working experience quickly became visible.

Although many employees now recognize the benefits of remote working, such as a reduced commute and improved work/life balance, our research found that some staff find working from home challenging.

Our interviews suggest that, even for office workers, the need for a physical presence and togetherness will persist – people have a deep-seated

need to connect with their colleagues. Advances in telecom networks and IT infrastructures now enable distributed workforces to interact with each other productively (see [chapter 7](#)), but some home workers have struggled with many aspects of virtual working. Social interactions, building (new) relationships and co-creating in this mostly formalized world, with its seemingly endless Zoom calls, can be very difficult. A virtual working environment may not be conducive to creating a sense of belonging and some employees may fear being marginalized.

A recent global Deloitte survey²⁸ found that 36% of European respondents find it difficult not being able to talk to clients and colleagues face-to-face. In particular, the age group of 55+ is struggling with remote work during the COVID-19 pandemic²⁹. Some of our interviewees echoed these sentiments. “Building people engagement is a much bigger challenge in WebEx sessions, you don't get the vibes you would in a physical meeting,” said Robert Redeleanu, CEO UPC Central & Eastern Europe. In a similar vein, John Porter, CEO of Telenet, added: “It is very hard to curate a culture remotely. I also miss the face-to-face connections. People get energy from talking to people.”



of European respondents in a global Deloitte survey find it difficult not being able to talk to clients and colleagues face-to-face



of the workforce has little or no opportunity for remote work



“The office becomes more relevant than ever. The more we are connected via mobile, the more we want to see each other face to face. The office has to compete with home offices, so the office has to become better.”

Jeroen Lokerse

Head of Netherlands, Cushman & Wakefield

Indeed, over half of the interviewees noted that the office space is an important location – for creativity, innovation, social cohesion, while physical togetherness is key to innovation and competitive advantage. Although further technological advances - with higher resolution screens, cameras, lighting and overall better set-up – will make it easier for remote workers to interact each other, a video call can't yet provide a full substitute for physical meetings.

Changing definition of the workplace and purpose of the office

Still, the changes in the nature of work and the workforce (described in the previous two chapters) are set to lead to major changes in how a physical workplace is configured.

In a world where many tasks and processes can be automated,

collaboration and co-creation in multidisciplinary teams is becoming a key differentiator. This requires physical togetherness and interaction, suggesting the office now needs to be a space that encourages people to talk to each other.

The first step could be to take a critical look at the type of work performed by workers, and arrange a workplace (digital or physical) based on these requirements. Indeed, a much more rigorous use of workspace would reduce risk, save on capital expense and improve productivity³⁰. There are essentially two guiding principles to consider – the actual location (real estate footprint) and the use of space (in terms of design, capacity and commercial model).

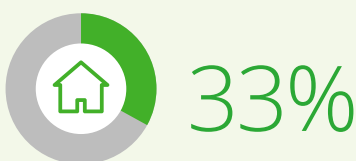
Although some office capacity will have to be allocated to workers who need access to specialized equipment or

are unable to work remotely due to personal situations, offices are likely to be at their best when used as a place of innovation, co-creation, social engagement, teaming and celebration. Indeed, some interviewees contended that offices need to be redesigned to explicitly support collaboration, connection and the sharing of ideas in a way that the home office cannot.

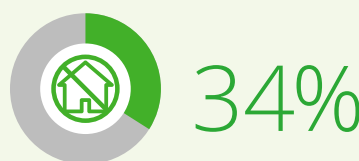
The role of a physical workspace in sustaining company culture

Although some experts forecast a major shift to distributed working, others predict that offices will remain the go-to workplace for most organizations. Indeed, views vary across our interviewees on whether traditional office space will shrink dramatically. Some of our experts foresee a marginal change, up to 5%, as companies maintain offices as connection hubs. Others see a shift to satellite offices and co-working spaces, bringing office space nearer to workers' living locations. One approach is for employees and their immediate managers to decide where they will be most productive on any given day.

Organizational and national cultures will help determine the extent and speed of these changes, with different approaches in different parts of Europe. Living space will also be an important factor. “Some regions will



of respondents of a Deloitte study in Europe believe it is easier to work from home



say it is harder

want to be in the office as much as possible,” noted Brandi Galvin Morandi, CHRO of Equinix. “In Hong Kong, for example, we have some team members with multiple generations of people living in a tight space, so they can’t wait to return to the office to enhance their productivity and overall well-being.”

Some interviewees stressed that a company’s physical buildings are generally a reflection of its corporate culture: the office needs to be a place that solidifies the significance of being a part of something bigger than yourself. “When you walk through a door with a logo on it, that means something,” noted Thomas Mulder of VodafoneZiggo, which is based in a futuristic landmark building in Utrecht.

Indeed, some interviewees believe building and sustaining an organizational culture and employer brand is becoming more challenging in a world where the office may no longer act as a melting pot. If employees are dispersed across regions (maybe countries) and only meet at occasion, organizations will need to create a virtual/physical workplace that can support the desired organizational culture.

However, other experts argue that a clear purpose can effectively create a sense of belonging and loyalty across a distributed workforce. Location and loyalty don’t always go hand-in-hand – some people are fiercely loyal to sports teams on the other side of the country, for example.

Reshaping work and living locations

The need to be present in centralized office locations has dictated the way we live. This requirement has determined people’s choice of living space, driven hour-long commutes and the dedication of specific cubicles to individual employees. But now organizations have a much more diverse set of options, from employer-sponsored home offices to distributed co-working locations. The “push” model, wherein employees would relocate and adjust their lives around an office location, may give way to a “pull” approach, in which the location of employees’ homes governs where work is done.

Now, the main attraction becomes the location ecosystem: other businesses, such as shops and cafes, connectivity infrastructure, such as high-speed internet, or environmental factors, such as reduced noise and air pollution, or social cohesion elements, such as living close to family and friends. Rather than working alongside colleagues, people may simply want to be surrounded by like-minded and driven people, notes Martijn Roordink, Founder of Spaces.

Indeed, flexible co-working spaces allow remote workers to share an office space with people from other organizations. As more workers capitalize on the benefits of hybrid work models, the purpose of cities will change, maintaining their social and cultural importance, but potentially less attractive as a business destination.



“The workplace will always be important. Especially for employees with more tenure, they need the workplace as a grounding place for where the organizational culture comes from. It’s about sharing moments and collaborating.”

Monica Santana

Lecturer Strategic Human Resource Management, University of Pablo de Olavide



Connectivity is vital for **competitiveness** and **advanced technologies**



Upskilling and more **equal distribution** of technology will be crucial



High importance of **digital security** and reliable **internet access**

7. Connectivity



The unsung hero of the future of work

Society now runs on connectivity as the combustion engine runs on petrol fuel. The pandemic has accelerated an existing trend in which most office workers must be online to get their jobs done. For many people today, no connectivity means a major drop in productivity. This chapter considers the fundamental importance of reliable connectivity to the future of work.

The digital revolution is in full swing

The amount of data flowing through businesses is increasing at an exponential pace³¹. Employees now have an Internet connection in the palm of their hand: there are about six billion smartphones in use worldwide³². Our interviewees flagged both companies' growing dependence on digital technologies³³ and their disruptive power³⁴. Investment in cloud infrastructure and services,

for example, continues to rise³⁵, despite the tendency of businesses to cut costs during the pandemic.

In the connectivity market, Giga networks and 5G networks are significantly enhancing throughput speeds and reducing latency, while allowing organizations to build their own private networks. These advances in connectivity are paving the way for advanced technologies, such as Blockchain, cloud, AI, and

- **Giga networks and 5G networks are significantly enhancing throughput speeds and reducing latency**
- **Advances in connectivity are paving the way for technology**



“Most organizations have traditionally focused on planning for physical and operational resilience only. COVID has shown companies that planning for organization and people resilience can be equally, if not more important.”

Adam Spearing
EMEA Field CTO & SVP
Solution Consulting
UKI Salesforce

digital reality technologies, that circumvent the limitations of the digital workspace³⁶. They are both disrupting how business is done, and attracting major investments³⁷.

Connectivity, and the digital services it enables, has become a vital source of competitiveness. Deloitte research³⁸ has found that more and more organizations are using digital technologies to design highly customized experiences around the behaviors, preferences, and emotions of individual users. For example, AI capabilities, such as voice stress analysis and micro-expression detection tools, are enabling companies to inject emotional intelligence into their systems to help intuit a user’s mood and engage in a more human manner.

The future is here, but unevenly distributed

The mass shift to distributed working in the wake of the pandemic has proven the agility of existing networks and IT infrastructures to deal with increased demand. But the digital platforms that people use to connect and collaborate still need to improve, and many employees still lack the digital skills to work effectively remotely. A joint Deloitte and MIT survey³⁹ found 90% of companies believe yearly upskilling is required to enable employees to keep up with technological advances.

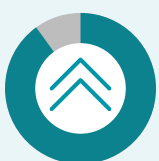
Moreover, access to technology is unequally distributed across geographies, economic classes and education levels. As research firm Gartner notes: “The impact of the digital divide on society has been fully exposed as a result of the pandemic.” The high-speed low-latency connectivity required to support a hybrid work environment simply isn’t available to many communities in Europe.

As described in the previous chapters, excessive remote working can have negative impacts on people’s well-being. In some cases, there is a mismatch between the technology and the needs of its users. Another concern is that some new technologies may be flawed or raise ethical issues. “Every algorithm is a manifestation of a human - AIs have biases, too,” noted Paul Lee of Deloitte.

Align technology with the future of work

Creating an effective digital workplace that provides employees with a seamless experience across situations, locations and devices will require employers, telecoms operators and equipment vendors to work together. They need to fully integrate the hardware and software that we use to connect and collaborate with remote colleagues, while also bolstering cyber and information security.

Several of our interviewees highlighted the need for immediate action to improve security. IDC, for example, stressed the importance of securing worldwide peer-to-peer connections encompassing distributed employees, supply chain partners and even clients/end-users. Meanwhile, Gartner has called



90%

of companies believe yearly up-skilling is required to enable employees to keep up with technological advances

for executive leaders to increase customer trust by building “a holistic and adaptive privacy program across the organization, and be proactive instead of responding to each jurisdictional challenge.”

Organizational action could also address some of the downsides of distributed working. Targeted data and AI tools could help drive engagement across a workforce that is becoming more dispersed and diverse, but controls will be important to prevent misuse.

Putting digital tools in the hands of more people

The pandemic has highlighted how technology can open up opportunities to an extended labor pool and help to reduce the inequalities in society. Therefore, reliable broadband Internet access has to be a high priority for employees, employers and governments. Indeed, the business community will need the help of

policymakers to overcome the digital divide and broaden the workforce. In many cases, government intervention and investment, supplemented by public-private partnerships, will be required to drive wider broadband coverage. As digital platforms and infrastructure scale, the private sector could reciprocate by supporting governments’ efforts to bring digital technologies and educational tools to people at risk of being excluded from the digital revolution.

If key stakeholders work together, they can put powerful digital tools in the hands of more people. Having identified the COVID-19 pandemic as a significant driver of societal digital divide, Telenet in Belgium, for example, is working with various social organizations to “help shape digital inclusion.” Telenet is now offering a subsidized connectivity product (“Telenet Essential Internet”) to bring basic Internet to vulnerable groups at a fixed monthly rate of €5.



8. Conclusion

The changes in work, the workforce and the workplace, described in the preceding chapters, are happening across the economy and across the world. Although there are cultural differences between different countries, a lot of businesses, individuals and governments will be impacted: They need to prepare for both transformation and disruption. This chapter outlines the key implications and considerations for these three sets of stakeholders.



Businesses

Businesses – take a step back and reimagine work

Digital capabilities (encompassing secure infrastructure) and organizational agility (built on delegated decision-making) are more important than ever. After all, the digital transition is an arms race: organizations compete on the basis of their ability to exchange information and make meaningful decisions – their digital infrastructure needs to be both easy-to-use and failure proof.



Individuals

Indeed, businesses recognize the importance of reskilling. In the 2021 Deloitte Global Human Capital Trends survey⁴⁰, almost three quarters of executives identified “the ability of their people to adapt, reskill, and assume new roles” as one of the two most important factors to navigate future disruptions. Yet only 17% say their workers are very ready to adapt, reskill, and assume new roles. Both employers and employees need to be aware that many soft-skills will need to be developed through in-person interactions, rather than from behind a computer screen. To holistically rethink what work needs to be done and how, we advise organizations to take a step back and reimagine the way work will be done going forward.



Governments

At the same time, organizations clearly need to develop robust skilling capabilities to keep up with technological advances, while also designing a blend of physical and digital workplace that balances the need for collaboration and the need for flexibility.

They should ask fundamental questions about each task or process, such as:

- Does that task need to be done?
- Does it need to be done by people? If so, where can it be done?
- Can people and machines work together in an augmented way?

Technology has the potential to transform the roles of workers, beyond task level, to assume strategic significance. This is about much more than automation and process efficiency – our research implies that organizations must focus on how to remain human in a technology-driven world: humanity and technology don't need to be in conflict.

The next step is to define the optimal workforce to do the work (be it workers on payroll or flexible talent) and then design a bold, engaging and inclusive employee experience. Why? Because that is what people want: they expect organizations to take an active role in creating lasting value for themselves, their workforce, and society at large. As discussed in the previous chapters: employees now consider well-being, flexibility and purpose, in addition to traditional rewards and benefits packages, when choosing who to work for. In fact, 80% of executive respondents in the Deloitte Human Capital survey regard well-being as a very important topic ⁴¹. Employers need to take note and

think carefully about the experience they provide for both existing and new staff.

At the same time, businesses should overhaul their office and technological capacity to support the optimum mix of distributed working and in-person collaboration in physical workspaces. Rather than being the default place of work for everyone, offices need to be specifically designed as places of innovation, co-creation, social engagement, teaming and celebration. Clearly, remote workers also need to be equipped with the connectivity and digital tools they need to fulfill their roles effectively, wherever they choose to work.

Finally, and perhaps, most importantly, business leaders should look to build trust across their organizations. Without it, an organization will be flat-footed. The shift to more independent working and faster decision-making in the wake of the pandemic needs to be sustained and underpinned by new performance measures – any organization that relies on top-down dictates will lose talented staff and quickly fall behind in fast-moving environment.

Individuals - new mindset and softer skills

Although preparing for the future of work is a shared responsibility for businesses, governments and individuals, each worker needs to

take the opportunities provided and ensure their skills remain relevant. With the widespread adoption of flexible employment contracts, the relationship between employer and employee will weaken. That makes it risky for employees to depend on a single employer to provide them with the upskilling needed to ensure their ongoing employability.

Just as employees may expect their employers to support them in the journey, employers will expect their workforce to actively take part in the journey.

As the future of work is likely to have a large remote component, employees need to consider investing (via employers or independently) in a robust home office set-up underpinned by stable, high-speed connectivity. Individuals will have to ensure they have access to ubiquitous connectivity to participate socially, as well as professionally. Being disconnected is fast becoming akin to being off the electricity grid: an enormous hindrance to getting anything done.

More broadly, the changes in the nature of work, and the way it is executed, call for a different mindset from employees. They need to be willing to tap the ever-expanding array of offerings to develop new skillsets, which are becoming available digitally to more and more people across the globe. In particular, individuals must develop soft skills - as AI and robotics are increasingly able to perform "hard-skill" intensive work. In some cases, these soft skills will need to be honed in face-to-face interactions in a physical workspace.



of executive respondents in the Deloitte Human Capital survey regard well-being as a very important topic

So-called “enduring human capabilities” will become key to ensuring employability. For professionals, the “three Bachelor plus two Master years” higher educational model will no longer be sufficient. Instead, an open mind will be a necessity, as will a willingness to acquire new skills, as demanded by the labor market.

Governments – support reskilling and better infrastructure

While the role of the government is not the core of this study, it was discussed in multiple interviews. Several interviewees noted how legislation generally fails to keep up with technological advances and data security challenges ⁴³. Moreover, Paul Lee of Deloitte contended that achieving universal connectivity will be impossible without government contribution. Indeed, governments will need to continuously assist private operators in nourishing the infrastructure ecosystem to maintain a high standard of connectivity and national competitiveness.

At the same time, our research suggests policymakers need to do more to mitigate the risk of a growing divide between the ‘haves’ and ‘have-nots’. We have hypothesized that national governments will have to increasingly define policies to safeguard employees and their employability, for example, by providing training, upskilling and financial aid.

In recent years, some governments have introduced policies and large programs to support workers in building the skills for the future. These kind of government-supported reskilling programs are important to maintaining national competitiveness, according to Stefan Olsson, Director Employment at the European Commission. “We’re on the tipping point of reskilling acceptance,” he added, noting that employers, governments and trade unions are now working together to address this challenge in some EU Member States.

But reskilling tens of millions of people in a timely fashion won’t be easy. Perhaps the biggest challenge for policymakers will be ensuring that large numbers of citizens are not left behind. “The problem isn’t just that jobs will disappear and new jobs will appear,” noted Monica Santana Hernandez of the University of Pablo de Olavide. But “there’s a huge debate if everyone can be trained for the new jobs.”

Ensuring a viable and dynamic future for cities presents another challenge for national and local governments. If many white-collar staff do continue to work from home or in small satellite offices, major cities could see their daytime economies suffer and business investment fall away. To mitigate this impact and ensure cities remain attractive places to work and live, governments may need to employ financial incentives and invest in new parks and other public spaces.

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John Porter	<i>Chief Executive Officer, Telenet</i>	Julie Fionda	<i>Deputy Head of Unit, Skills and Qualifications, DG EMPL, European Commission</i>

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