

7-5-2019 | Han Mesters | Sector Advisory | 3e OV IJmond Kenniscarrousel

Goed personeel: vinden & binden



Agenda

1. Macro & (HR) trends
2. Arbeidsmarkt: op naar structurele schaarste?
3. Het pijnlijke stuk
4. Fit for the future?



The image features a group of business professionals in silhouette, standing in a modern office with large windows. The background is a bright, warm sunset or sunrise, creating a high-contrast scene. The silhouettes of the people are reflected on the floor. A green and teal gradient banner is overlaid across the middle of the image, containing the text "Macro en (HR) trends".

Macro en (HR) trends



Waar gaan we heen?

2 opties



.....of.....(Large companies are dying, even Apple)

Ricardo Semler: "Grote bedrijven liggen op sterven, zelfs Apple"

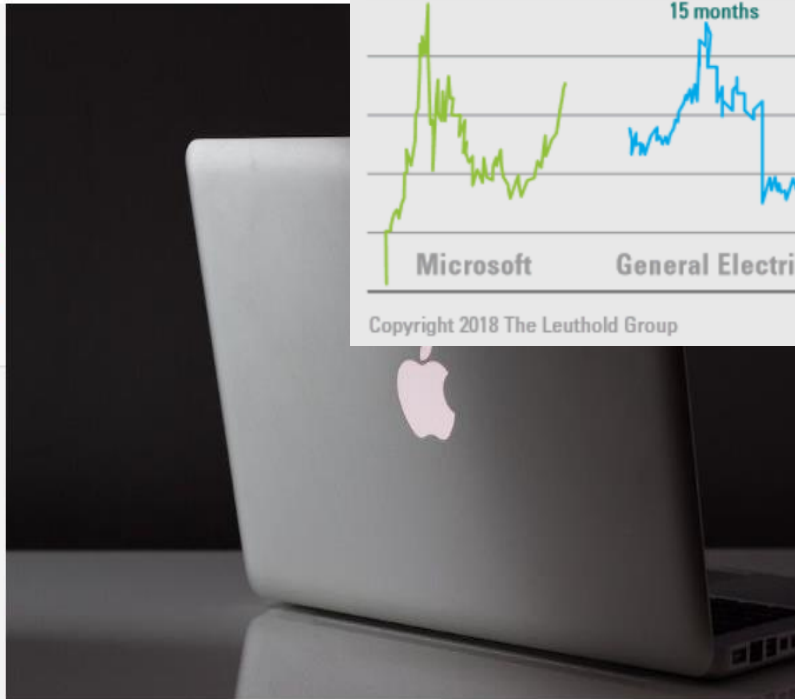


Door [Magali De Reu](#) – maandag 4 januari 2016 – [Ondernemen](#)

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Companies to have reached a four percent weight in the S&P 500, 1990 to date (... and how long they were able to stay there)



De Braziliaanse business expert, investeerder en ondernemer Ricardo Semler vindt er geen doeljes om: de tijd van grote, militair georganiseerde bedrijven ligt achter ons. Innovatie komt niet van grote organisaties die duizenden werknemers willen controleren. En ja, ook bedrijven als Microsoft en Apple zijn ten dode opgeschreven..

Ook voor 2020 redelijk bescheiden economische groei

Kerncijfers Nederlandse economie

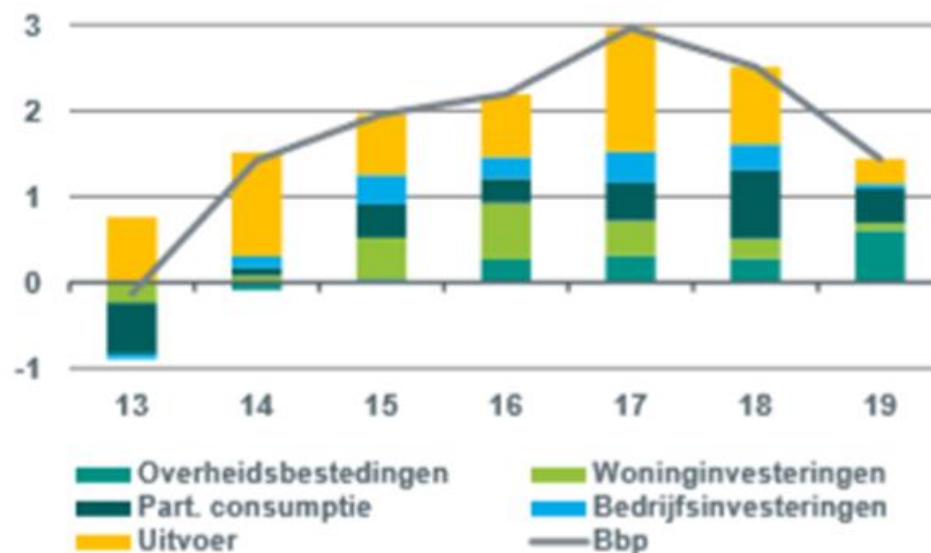
	2017	2018	2019	2020
	% mutaties			
Bbp	3,0	2,5	1,4	1,6
Particuliere consumptie	1,9	2,4	1,5	1,7
Overheidsconsumptie	1,1	1,1	2,5	2,3
Investeringen	6,2	4,7	1,9	1,9
Uitvoer	5,6	2,6	0,9	2,6
Invoer	5,2	2,5	1,1	3,1
Consumentenprijzen (CPI)	1,4	1,7	2,5	1,7
Consumentenprijzen (HICP)	1,3	1,6	2,3	1,6
Lonen particuliere sector	1,6	2,0	2,6	2,6
	Niveaus			
Werkloosheid (% beroepsbevolking; gem.)	4,9	3,8	3,6	3,7
Lopende rekening (% bbp)	10,5	10,0	9,7	9,5
Saldo overheid (% bbp)	1,2	1,5	0,8	0,3

Herziene cijfers (t.o.v. vorige 'Nederlandse economie in zicht') zijn gecursiveerd.

Ramingen: ABN AMRO Economisch Bureau

Groei komt dit jaar vooral uit het binnenland

Bijdrage bestedingscomponenten aan bbp-groei in %-punten



Bron: CPB en ABN AMRO

Automatisering en werk: wie het weet mag het zeggen.....

Bron: <https://ig.ft.com/can-a-robot-do-your-job/>

For lawyers, judges, and related workers,

5

of 23 activities
could be done by a robot.

This group includes jobs such as **lawyers, judges and arbitrators.**

[Read the methodology](#)

For legal support workers,

3

of 10 activities
could be done by a robot.

This group includes jobs such as **paralegals, court reporters and title examiners.**

Predicted Jobs Automation Will Create and Destroy

When	Where	Jobs Destroyed	Jobs Created	Predictor
2016	worldwide		900,000 to 1,500,000	Metra Martech
2018	US jobs	13,852,530*	3,078,340*	Forrester
2020	worldwide		1,000,000-2,000,000	Metra Martech
2020	worldwide	1,800,000	2,300,000	Gartner
2020	sampling of 15 countries	7,100,000	2,000,000	World Economic Forum (WEF)
2021	worldwide		1,900,000-3,500,000	The International Federation of Robotics
2021	US jobs	9,108,900*		Forrester
2022	worldwide	1,000,000,000		Thomas Frey
2025	US jobs	24,186,240*	13,604,760*	Forrester
2025	US jobs	3,400,000		ScienceAlert
2027	US jobs	24,700,000	14,900,000	Forrester
2030	worldwide	2,000,000,000		Thomas Frey
2030	worldwide	400,000,000-800,000,000	555,000,000-890,000,000	McKinsey
2030	US jobs	58,164,320*		PWC
2035	US jobs	80,000,000		Bank of England
2035	UK jobs	15,000,000		Bank of England
No Date	US jobs	13,594,320*		OECD
No Date	UK jobs	13,700,000		IPPR

Robots in workplace 'could create double the jobs they destroy'

Rise of machines could lead to 133m jobs globally in next decade - WEF report



▲ The World Economic Forum report suggests new technologies have the capacity to both disrupt and create new ways of working. Photograph: Alamy Stock Photo

The **rise of machines, robots and algorithms** in the workplace stands to create almost double the number of jobs for the global economy by the middle of the next decade than it puts at risk of being replaced.

According to the World Economic Forum (WEF), about 133m jobs globally could be created with the help of rapid technological advances in the workplace over the next decade, compared with 75m that could be displaced.

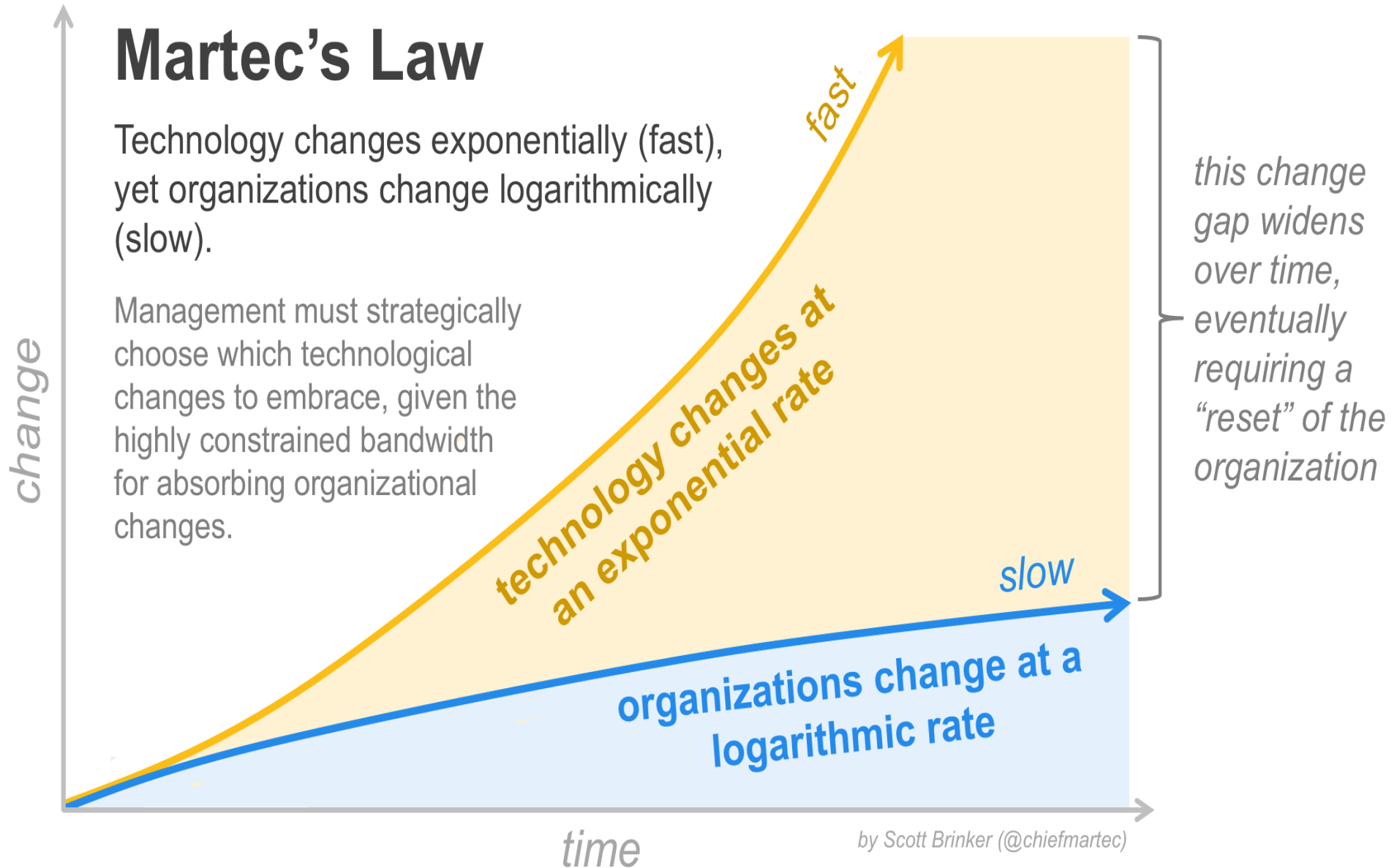
The findings will go some way towards **assuaging fears that the rise of the robot economy** could cost millions of workers their jobs, with widespread ramifications for pay, living standards and inequality across developed nations.

The WEF report suggests new technologies have the capacity to both disrupt

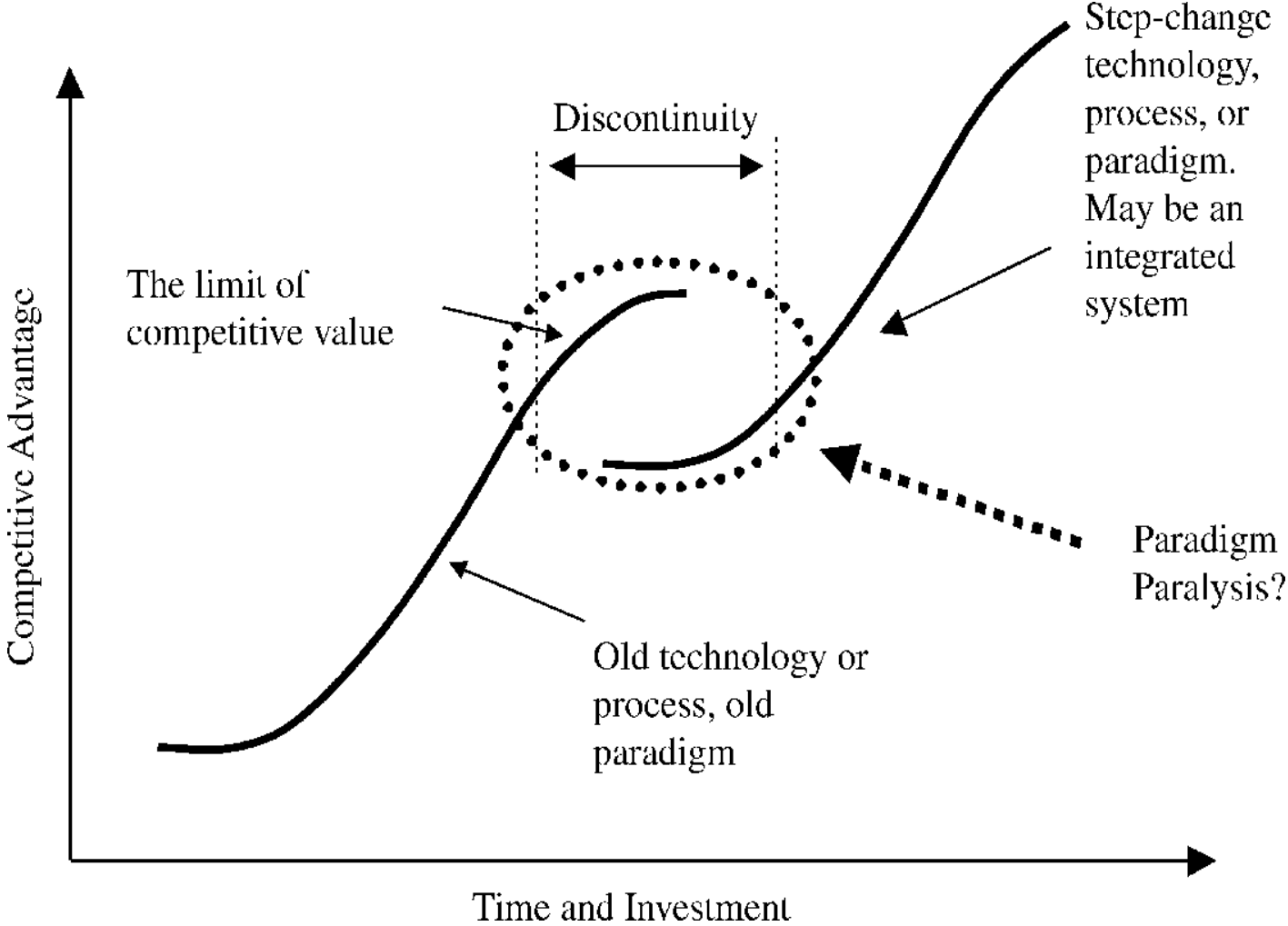
Martec's Law

Technology changes exponentially (fast), yet organizations change logarithmically (slow).

Management must strategically choose which technological changes to embrace, given the highly constrained bandwidth for absorbing organizational changes.



De kern van het probleem.....nog steeds...



Weg omzetgroei....

JoJ omzetgroei (10 jaar voortschrijdend gemiddelde), markt ex financials



Source: Worldscope, Datastream, Goldman Sachs Global Investment Research

1

..... Realiteit: innovatiekracht van instituten blijft laag.....



Te veel 'exploitation' competenties....

Te veel smurfen....



EXPLOITATION

EXPLORATION

Short-term
Efficiency
Discipline
Clarity of direction
Internal focus
Productivity focus

Long-term
Innovation
Flexible adaptation
Empowerment
External focus
Growth focus

~2% of firms

The image features a group of business professionals in a modern office environment. They are silhouetted against a large window that looks out onto a sunset or sunrise, with the sky transitioning from blue to orange and yellow. The office floor is highly reflective, mirroring the silhouettes of the people. A prominent green and teal banner is overlaid across the middle of the image, containing the text.

Arbeidsmarkt: op naar structurele schaarste?

Werkgelegenheid per sector 1807-2016

% van totaal



Landbouw



Industrie



Handel, horeca



Bouw



Zakelijke dienstverlening



Logistiek en ICT



Verhuur en handel O.G.



Financiële dienstverlening



Delfstoffenwinning



Energie, water, afval



Openbaar bestuur



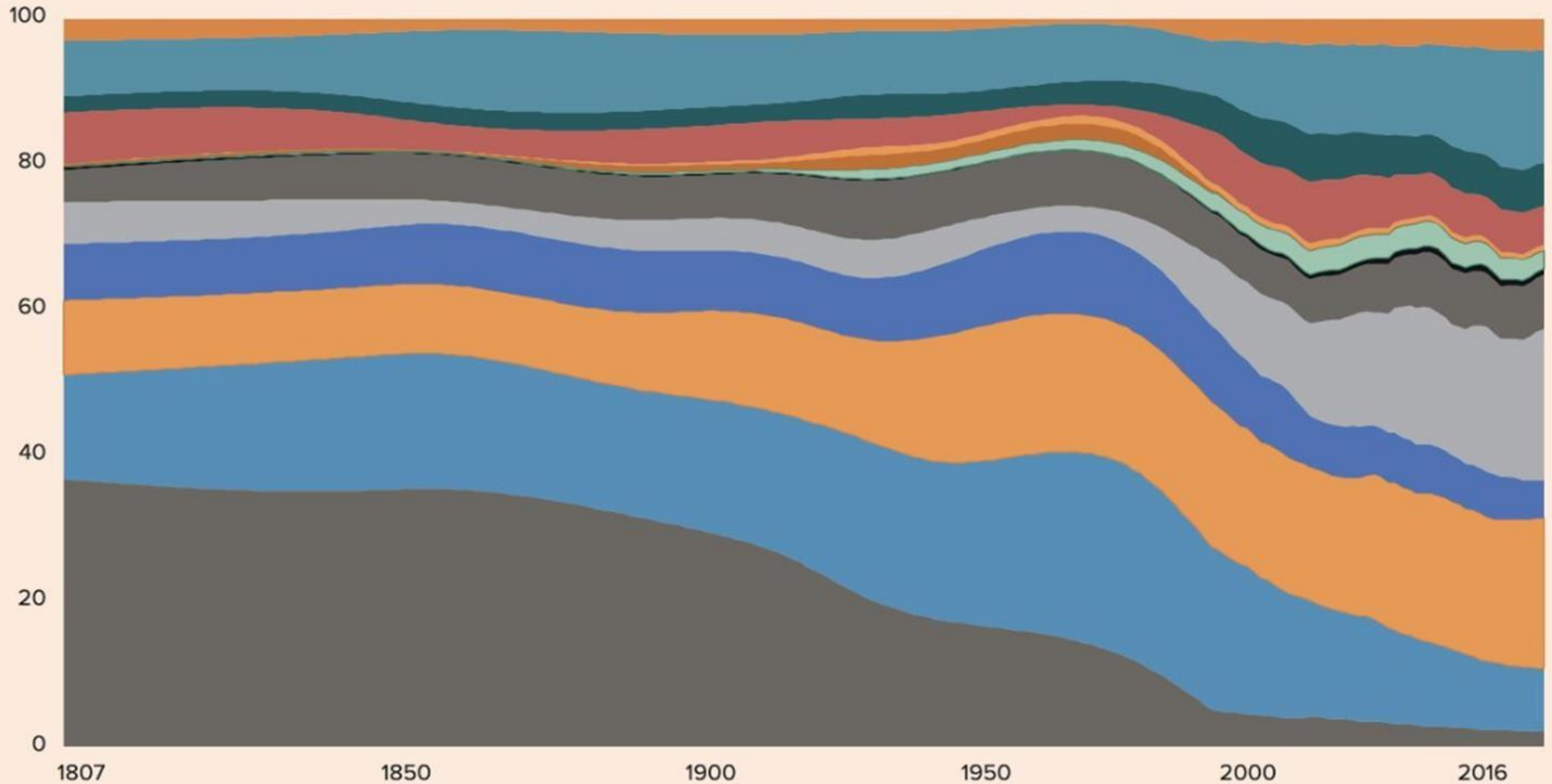
Onderwijs



Zorg



Cultuur, recreatie



Intangible assets (human resources, technology, knowhow, brands, etc.) are gradually replacing tangible assets (plants, facilities, etc.) as sources of corporate value.

✓ **In the United States, the share of intangible asset investment in added value created by companies is higher than that of tangible asset investment.**

✓ **The share of intangible assets in the market value of S&P500 issues (500 major issues listed in the United States) has been growing annually.**

Investment in tangible and intangible assets by U.S. companies

US private sector investment in tangible and intangible capital (relative to gross value added), 1977–2014

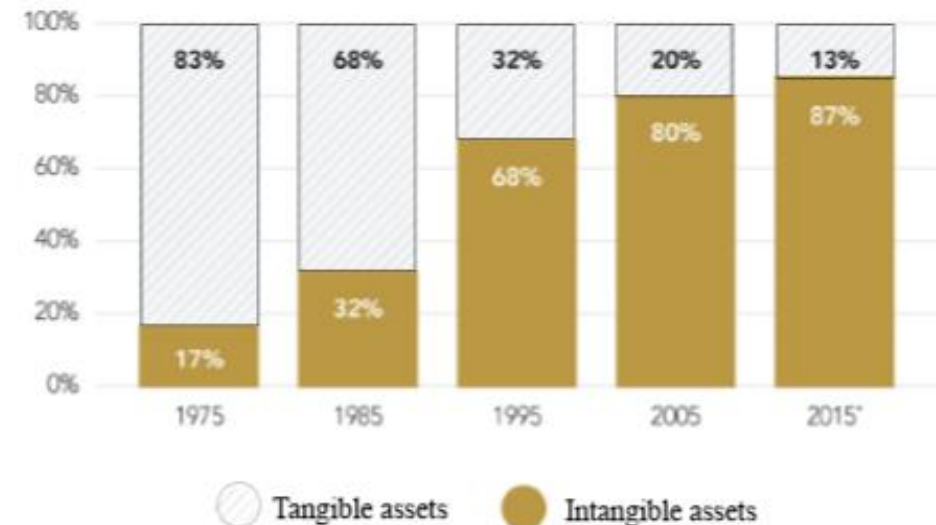


Figure 8.1 The Intangibles Revolution

Source: The End of Accounting and the Path Forward for Investors and Managers (Baruch Lev, Feng Gu), Willy Financial Series, Page 82

Components of S&P500 market value

COMPONENTS of S&P 500 MARKET VALUE



SOURCE: OCEAN TOMO, LLC

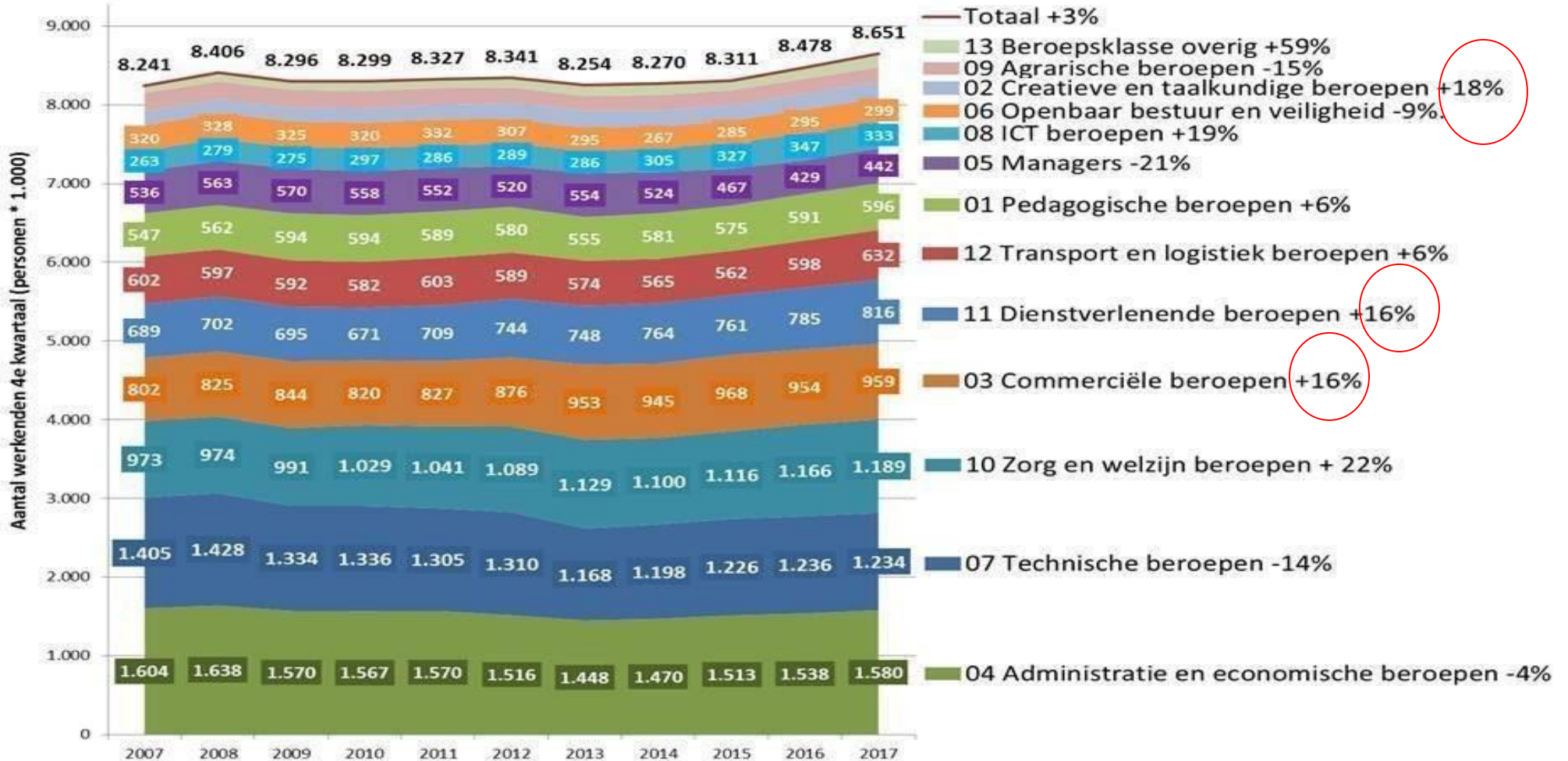
Verwachtingen arbeidsmarkt voor 2019.... (eind 2018)

Uit prognoses van UWV en enquête onder ruim 2000 werkgevers ontstaat volgende beeld:

- In 2019 ontstaan naar schatting 1,2 miljoen vacatures, waarvan **de meeste in de sectoren detailhandel en zorg en welzijn.**
- Het aantal banen groeit naar verwachting naar 10,6 miljoen.
- Ruim de helft van de werkgevers zegt dat door de krapte op de arbeidsmarkt vacatures minder snel vervuld worden. Bijna de helft geeft aan dat de werkdruk hoger wordt **en 41% zegt dat de loonkosten zullen stijgen als gevolg van de krapte.**
- Drie van de tien werkgevers verwachten dat het voor hen in 2019 (veel) moeilijker wordt om vacatures te vervullen in vergelijking tot 2018. Van de bedrijven die nu al moeilijk vervulbare vacatures hebben verwacht 41% dat het in 2019 moeilijker wordt.
- Twee van de tien bedrijven verwachten dat het (veel) moeilijker wordt om personeel te behouden. Ruim zeven op de tien denken dat het niet moeilijker of makkelijker wordt

Iemand wordt wakker: toename creatieve beroepen..

Sinds 2007 het aantal werkenden met 3 % gestegen, maar grote verschillen per beroepsgroep



Het verhaal achter de schaarste (najaar 2018)

Tabel 1 Aandeel bedrijven met vacatures, % moeilijk vervulbare vacatures o.b.v. een enquête onder werkgevers najaar 2018

Sector	Aandeel bedrijven met ontstane vacatures	% moeilijk vervulbare vacatures t.o.v. aantal ontstane vacatures
Landbouw	48%	44%
Industrie	75%	50%
Bouw	68%	58%
Groothandel	59%	42%
Detailhandel en autohandel	61%	49%
Vervoer en opslag	71%	51%
Horeca	58%	44%
Communicatie en informatie	58%	43%
Financiële instellingen	48%	37%
Verhuur, uitzendbureaus, facility management	55%	50%
Advisering en onderzoek	58%	50%
Openbaar bestuur	82%	31%
Onderwijs	69%	42%
Gezondheid en welzijn	62%	35%
Cultuur, sport en recreatie	64%	48%
Overige dienstverlening	49%	47%
Totaal	59%	46%

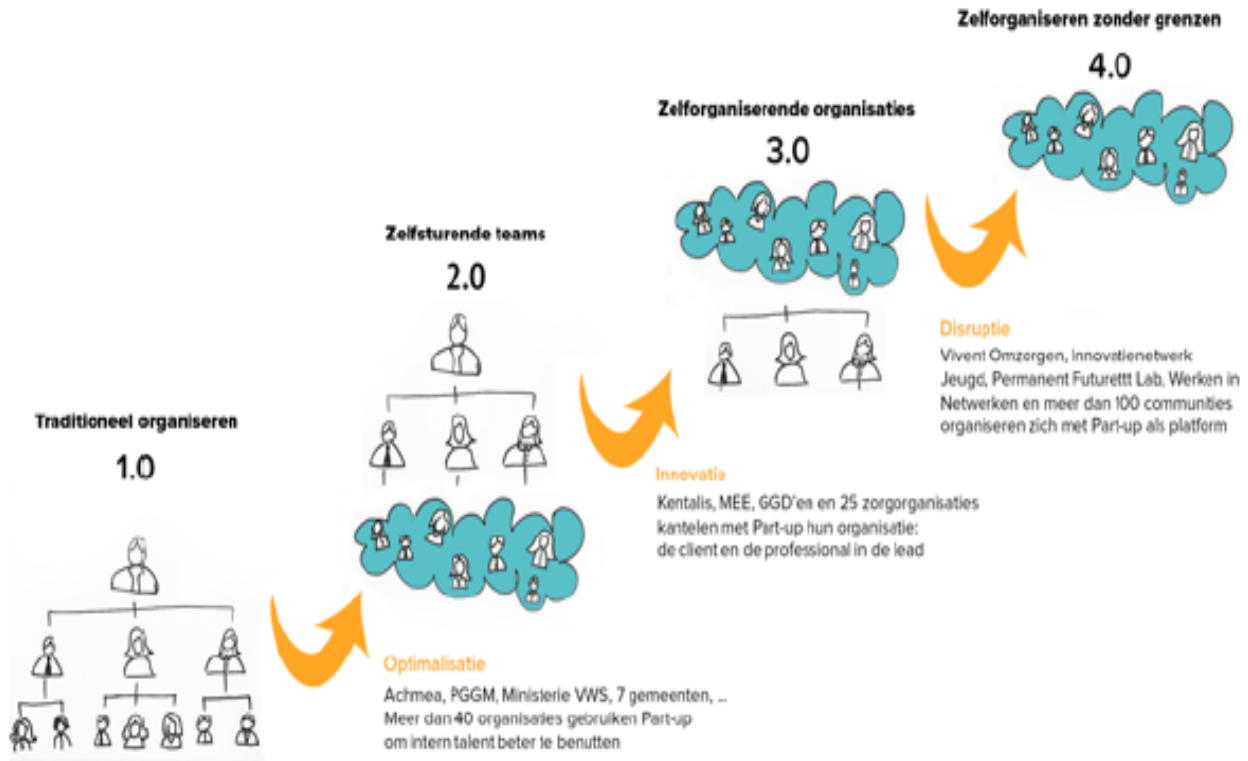
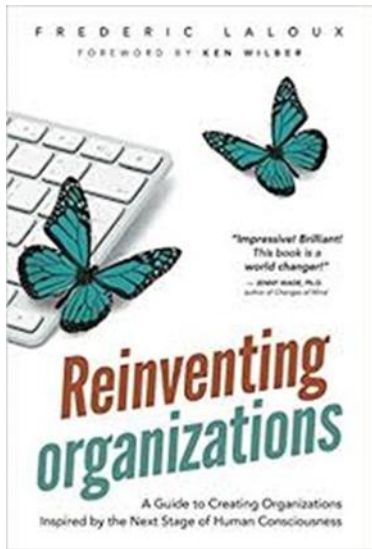
Evolutie van bedrijven

1.0 Traditioneel organiseren

2.0 Zelfsturende teams

3.0 Zelforganiserende organisaties

4.0 Zelforganiseren zonder grenzen



Slagkracht			
Top-down, (macht via hiërarchie)	Top-down met feedback (team aanspreekbaar)	Bottom-up met feedback (Individu aanspreekbaar)	Peer-to-peer tussen individuen
Wendbaarheid van de organisatie			
Stabiel / log	Lage dynamiek	Hoge dynamiek	Exponentieel aanpassingsvermogen
Talenten binden en verbinden			
Talent in vaste functies	Intrapreneurship binnen de kaders	Interne en externe talent gerichtheid	Onbeperkt samenwerken zonder organisatiegrenzen

Werknemers evolueren ook...Millennials en de nieuwe Maslov piramide..





Het pijnlijke stuk....

Exhibit 1: Students require 16 skills for the 21st century

21st-Century Skills

Foundational Literacies

How students apply core skills to everyday tasks



1. Literacy



2. Numeracy



3. Scientific literacy



4. ICT literacy



5. Financial literacy



6. Cultural and civic literacy

Competencies

How students approach complex challenges



7. Critical thinking/
problem-solving



8. Creativity



9. Communication



10. Collaboration

Character Qualities

How students approach their changing environment



11. Curiosity



12. Initiative



13. Persistence/
grit



14. Adaptability



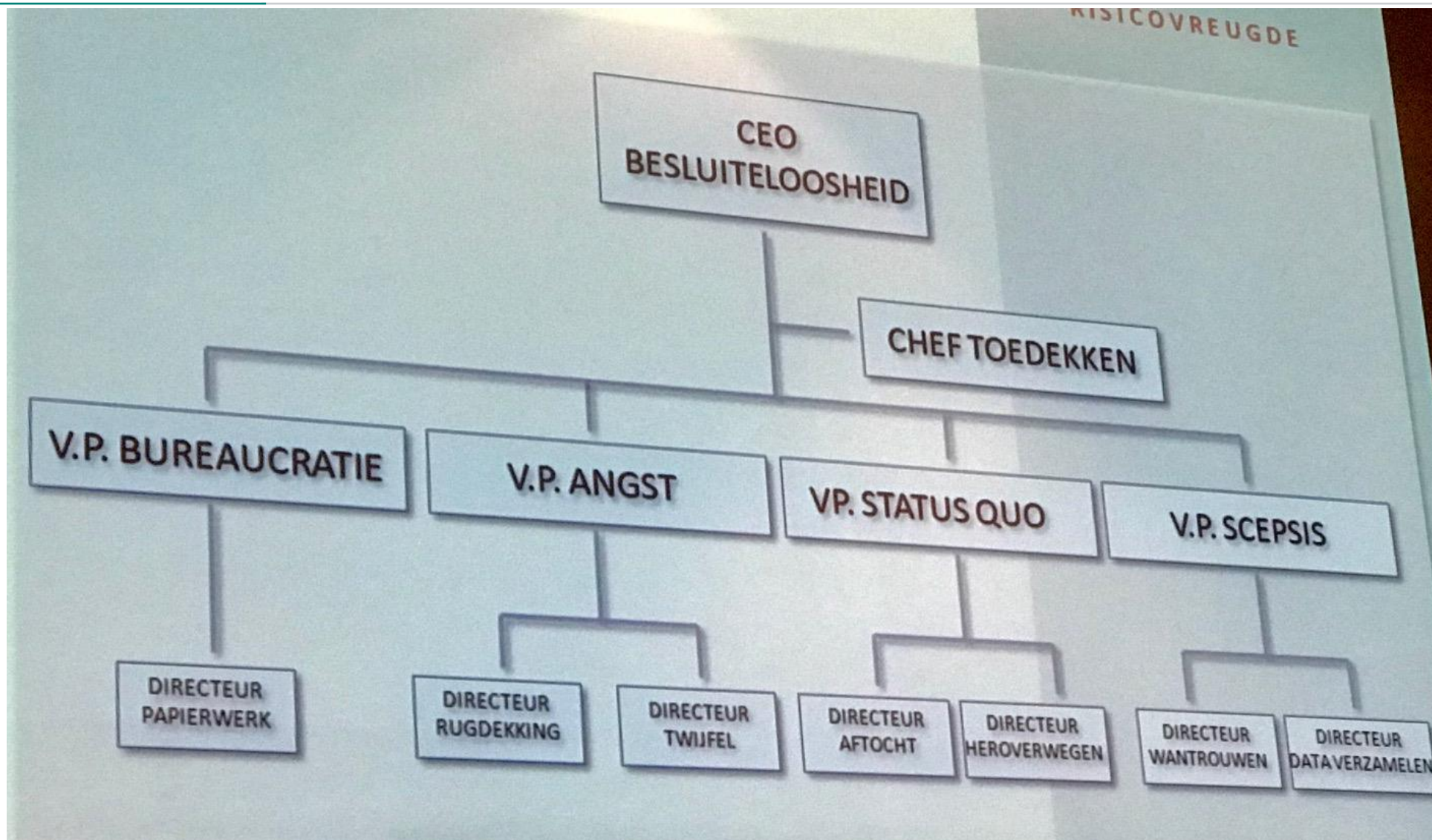
15. Leadership



16. Social and cultural awareness

Lifelong Learning

De status van de harkjesorganisatie....



De rapen zijn gaar: Larry Fink's brief aan CEO's

Dear CEO,

The board's engagement in developing your long-term strategy is essential because an engaged board and a long-term approach are valuable indicators of a company's ability to create long-term value for shareholders.

(...) And they are right to: a company's ability to manage environmental, social, and governance matters demonstrates the leadership and good governance that is so essential to sustainable growth, which is why we are increasingly integrating these issues into our investment process.

Companies must ask themselves: **What role do we play in the community? How are we managing our impact on the environment? Are we working to create a diverse workforce? Are we adapting to technological change? Are we providing the retraining and opportunities that our employees and our business will need to adjust to an increasingly automated world? Are we using behavioral finance and other tools to prepare workers for retirement, so that they invest in a way that will help them achieve their goals?**

Sincerely,

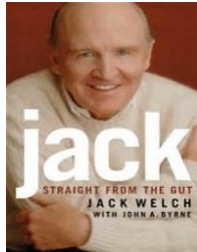


Randvoorwaarden om het beste uit mensen te halen

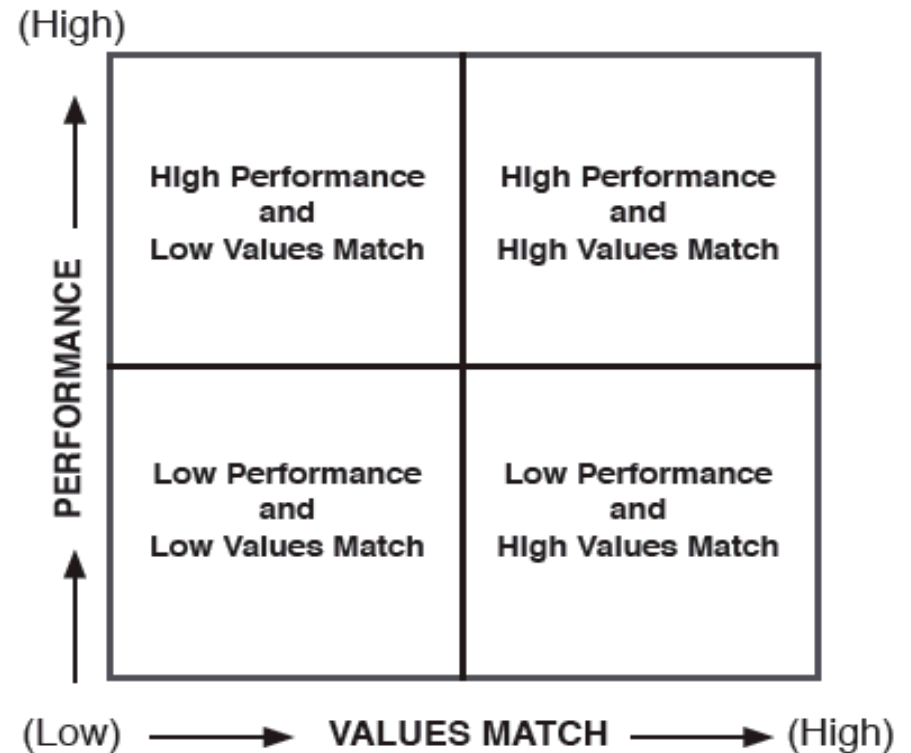
1. Daniel Pink heeft gelijk.....



2....MAAR Jack Welch ook...



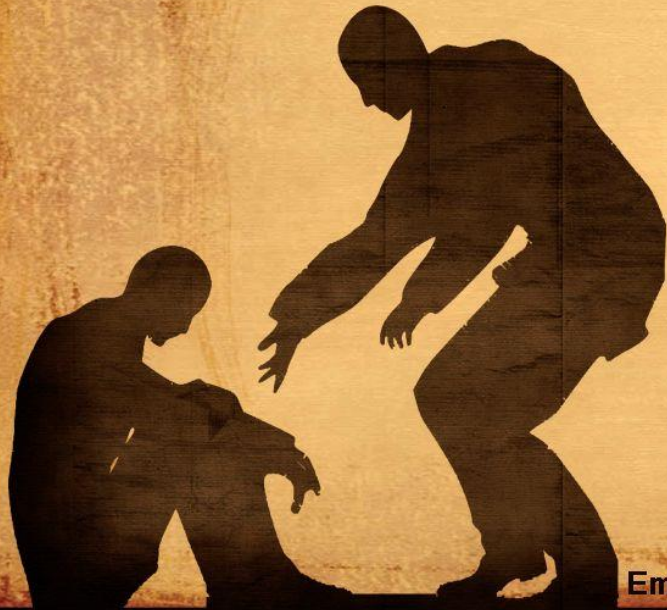
The Performance-Values Matrix



Rules of engagement.....anno nu

No matter how educated,
talented, rich, or cool you believe
you are, how you treat people
ultimately tells all.

Integrity is
Everything.



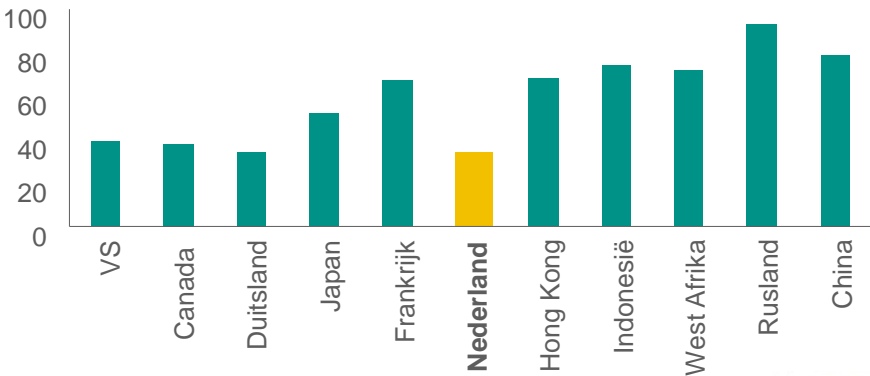
Fit for the future.....?



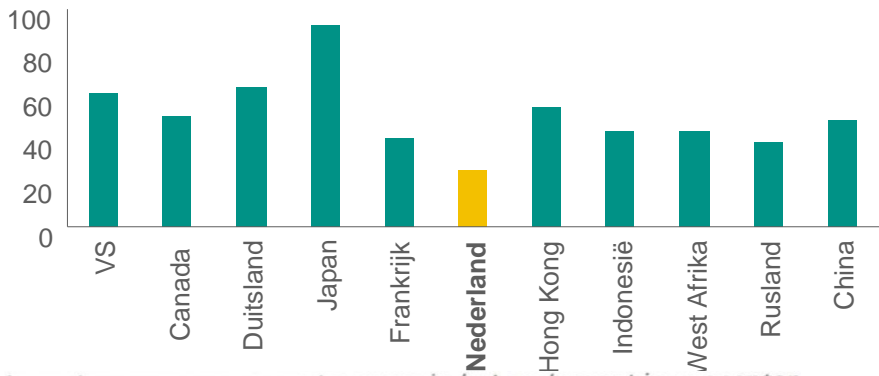
Scandinavians rule.....: Future DNA?

Low power distance, feminine culture....en 'trust'

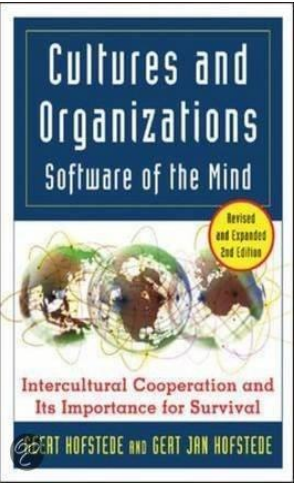
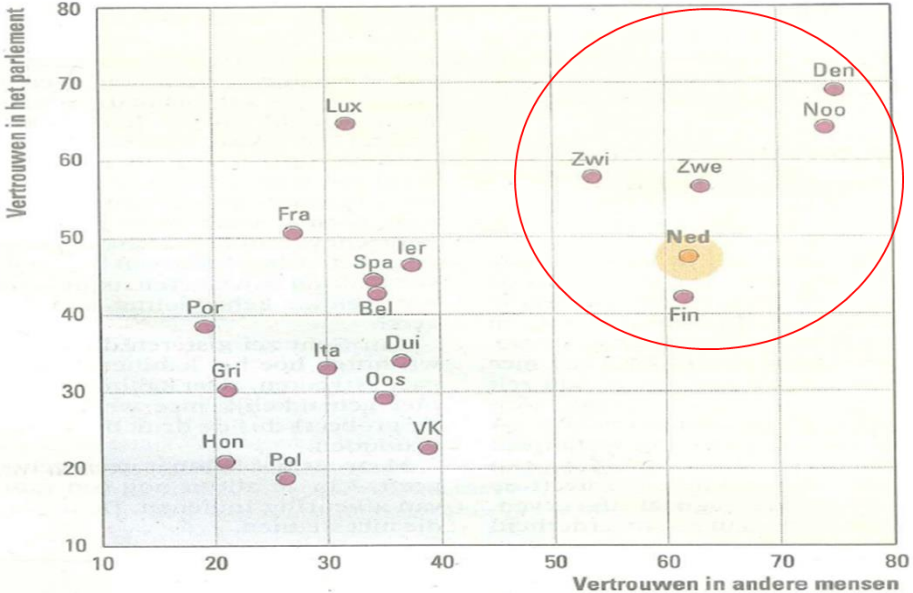
Power distance (hierarchy)



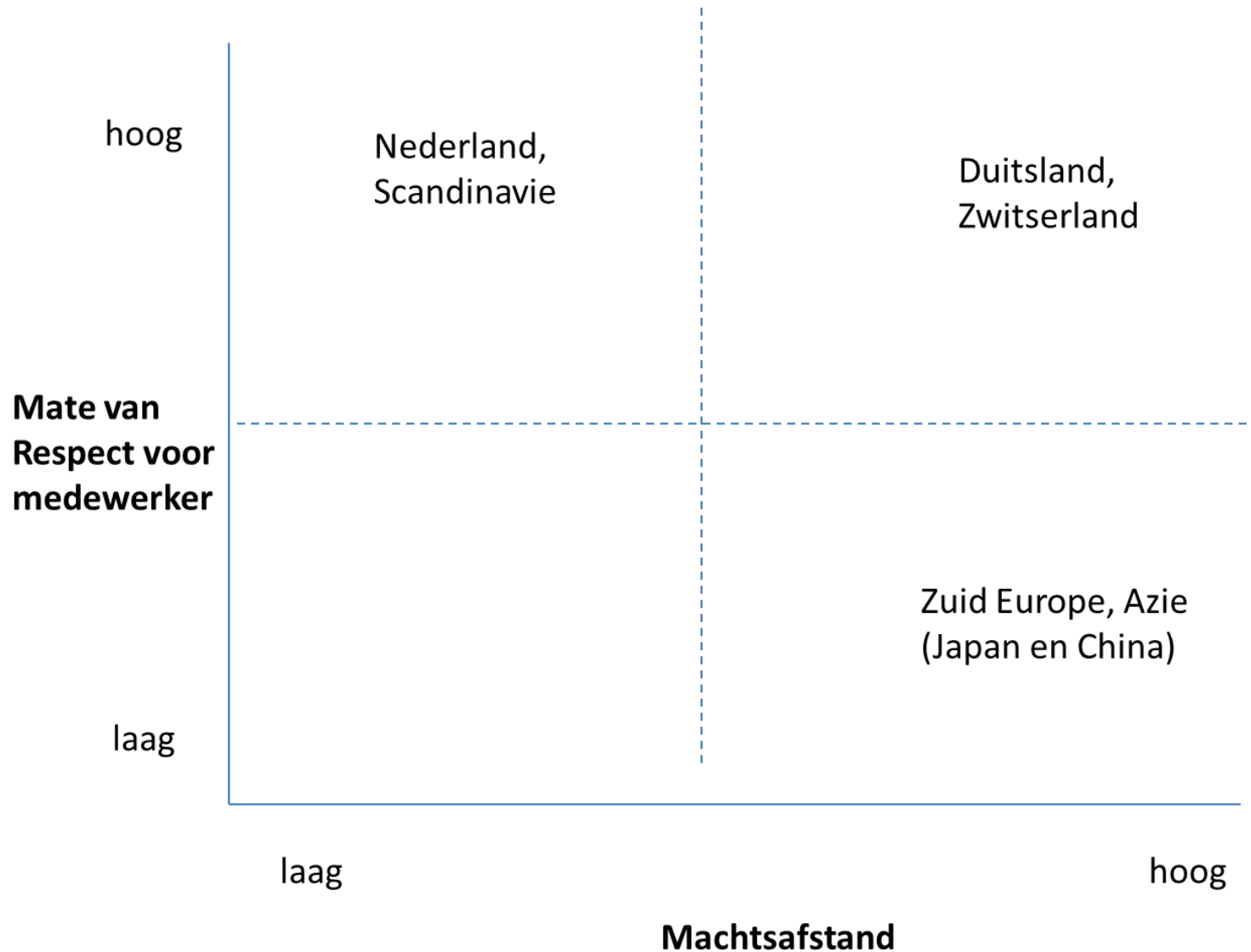
Masculinity



Vertrouwen in andere mensen en vertrouwen in het parlement in procenten onder de bevolking van 18 jaar en ouder, 2008-2009



Waar wil je werken?



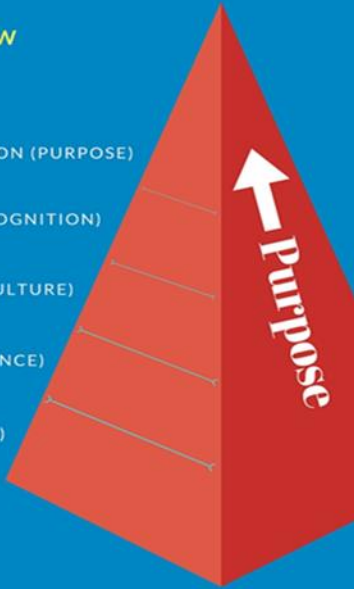
Culture.....



Spoorboekje van de 21e eeuw...

ORGANIZATIONAL MASLOW

- SELF-ACTUALIZATION (PURPOSE)
- ESTEEM (GROWTH / REGOGNITION)
- BELONGING (CO-WORKERS / CULTURE)
- SAFETY (JOB SECURITY / ASSURANCE)
- MONEY (BASIC INCOME / SURVIVAL)



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