

# Workforce of the future 2030

Global trends challenged by African realities

October 2019



[www.pwc.co.za](http://www.pwc.co.za)

# Contents

Executive summary .....	3
Our recommendations for CEOs in Africa	
Demographic dividend	
Global megatrends .....	6
Technological breakthroughs	
Shifts in global economic power	
Demographics shifts	
Rapid urbanisation	
Resource scarcity and climate change	
Today's future is discontinuous, disruptive and different .....	8
The competing forces shaping 2030	
What Africa can expect in the next decade .....	9
African opportunities to 'go digital'	
Companies in Africa need to adapt to remain sustainable .....	12
Four possible future scenarios	
The future of jobs	
Future skills and competencies	
Underlining requirements: Africa's workforce of the future .....	17
Africa's labour conundrum	
Education and skills shifts	
Future-ready strategies	
Message for African leaders.....	22
Contacts.....	24
About Strategy&	



## Executive summary

The Fourth Industrial Revolution is initiating immense change, driven by the mutually interdependent forces of artificial intelligence, the Internet of Things (IoT), network-based logic, augmented and virtual reality and quantum computing, which are expected to shape the next decade. The unprecedented speed of change will bring more advancements in the next ten years, than in the last 250 years.

This has led to many CEOs making digital initiatives their number one priority. But for CEOs in Africa the path ahead is less clear with regard to both technology and people. African CEOs identify insufficient understanding of the disruptive changes as the single biggest obstacle to future workforce planning, followed by resource constraints and insufficient alignment of their organisations' talent strategies with their broader innovation strategies.

By 2030, Africa will be home to more than a quarter of the world's population of under 25s, which will make up 60% of the continent's total population. By then, 15% of the world's working population will reside in Africa. The change in demographics suggests that Africa will need to expand its pool of highly-skilled employees through the development of cognitive STEM-based skills (science, technology, engineering and mathematics) and non-cognitive soft skills like sense-making and social intelligence competencies.

Every future world of work scenario is impacted by digital and automation technologies, leaving many workers around the world feeling anxious they will lose their jobs to automation. There are highly integrated and complex feedback loops between technology, systems, jobs and skill requirements.

These feedback loops and their relationship with the workforce will impact the **growth trajectory of businesses, jobs and skill requirements**.

Although Africa will experience unprecedented technological disruption, this also presents an opportunity for the continent to **drive inclusion and economic growth**, through the utilisation of future-ready strategies for job creation. PwC has developed an integrated ecosystem to support organisations in defining their future workforce, taking into account the impact of digital technologies on their strategy. PwC's UPskill solution provides a platform across the value chain, from strategy to execution, to prepare an organisation's workforce to be 'fit for purpose' for the future. **It allows companies to assess every job's relevance in the future.**







## Our recommendations for CEOs in Africa

### • Skills, partnerships and opportunities

- Employees should be prepared for future opportunities and the skills required for a workforce of the future.
- Employers should partner with institutions of learning to prepare for a disruptive future.

### • Nurture the right skills

- By attracting and nurturing the right talent, leaders will be able to correctly capitalise on the right skills.
- The human element is of great importance as the nature of jobs changes regularly.

### • Improve workforce digital IQ

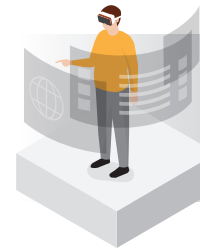
- The retraining and upskilling of the existing workforce in terms of digital technologies is crucial.

### • Flexibility allows creativity to flourish

- Plan for a dynamic future and ensure adaptability.

### • Experiment

- Be the driver and optimise challenges to push change.



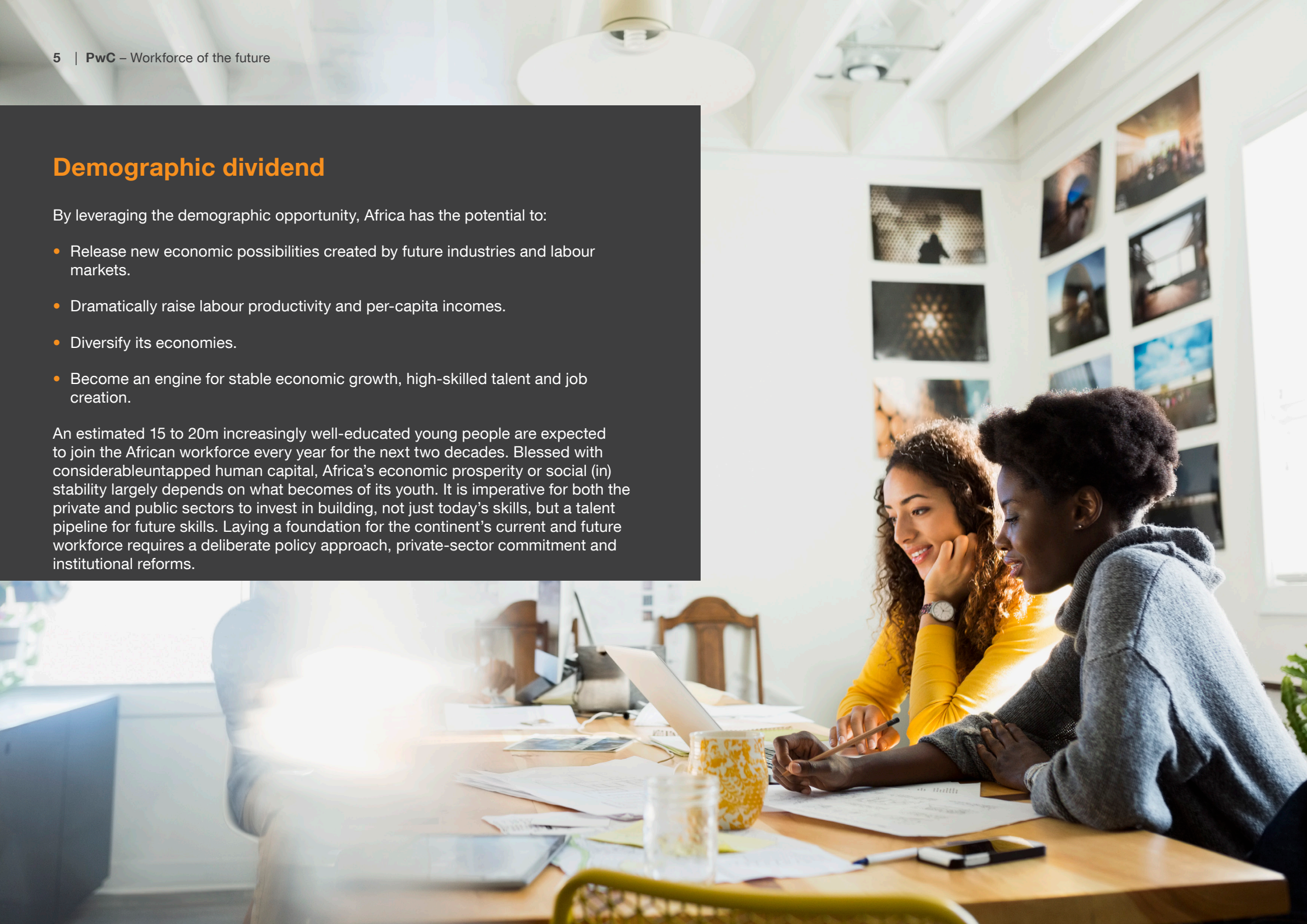


## Demographic dividend

By leveraging the demographic opportunity, Africa has the potential to:

- Release new economic possibilities created by future industries and labour markets.
- Dramatically raise labour productivity and per-capita incomes.
- Diversify its economies.
- Become an engine for stable economic growth, high-skilled talent and job creation.

An estimated 15 to 20m increasingly well-educated young people are expected to join the African workforce every year for the next two decades. Blessed with considerable untapped human capital, Africa's economic prosperity or social (in) stability largely depends on what becomes of its youth. It is imperative for both the private and public sectors to invest in building, not just today's skills, but a talent pipeline for future skills. Laying a foundation for the continent's current and future workforce requires a deliberate policy approach, private-sector commitment and institutional reforms.



# Global megatrends<sup>1</sup>



## Technological breakthroughs

There will be rapid breakthroughs in technology. Technologies such as automation, robotics and AI will change the number and nature of jobs available, and will present an opportunity to raise productivity and living standards.

## Shifts in global economic power

Global economic power will shift away from the established advanced economies in North America, Western Europe and Japan, and this trend will continue over the next 35 years.<sup>2</sup> In addition, working-age population growth in the advanced economies is expected to decrease, further modulating their economic power. Africa has immense potential to develop and grow its economy, given its demographic advantage.

<sup>1</sup> PwC, Workforce of the Future: The competing forces shaping 2030, 2018

<sup>2</sup> PwC, The World in 2050: Will the shift in global economic power continue?, 2015



## Demographics shifts

By 2030, Africa will be home to a quarter of the world's population under 25, resulting in a larger workforce that the continent can leverage to drive economic inclusion and growth.

In addition, it is forecast that life expectancy in Africa will increase from 63.5 years (2018) to 67 years (2030).<sup>3</sup> A longer life expectancy will affect business models and talent ambitions. Older workers will need to learn new skills and work for longer.

## Rapid urbanisation

By 2030, half of Africa's population will be living in cities (i.e. more than 700m people) compared to a third in 2010.<sup>3</sup> Basic housing and public services in urban areas (e.g. healthcare, education and public safety) will struggle to match the growth rates of the urban population across the continent. Africa will have 82 cities with populations of greater than a million; at least five will be mega cities with more than ten million inhabitants. Thus cities will become very important agents for job creation.<sup>4</sup>

<sup>3</sup> BMI data, UN Fitch Solutions

<sup>3</sup> World Bank, Urbanisation in Africa: Trends, Promises and Challenges, June 2015 - <http://www.worldbank.org/en/events/2015/06/01/urbanization-in-africa-trends-promises-and-challenges>

<sup>4</sup> NTU-SBF Centre for African studies, Urbanisation in sub-Saharan Africa: City master plans, 2018 - <https://www.howwemadeitinafrica.com/urbanisation-in-sub-saharan-africa-city-master-plans/61241/>

## Resource scarcity and climate change

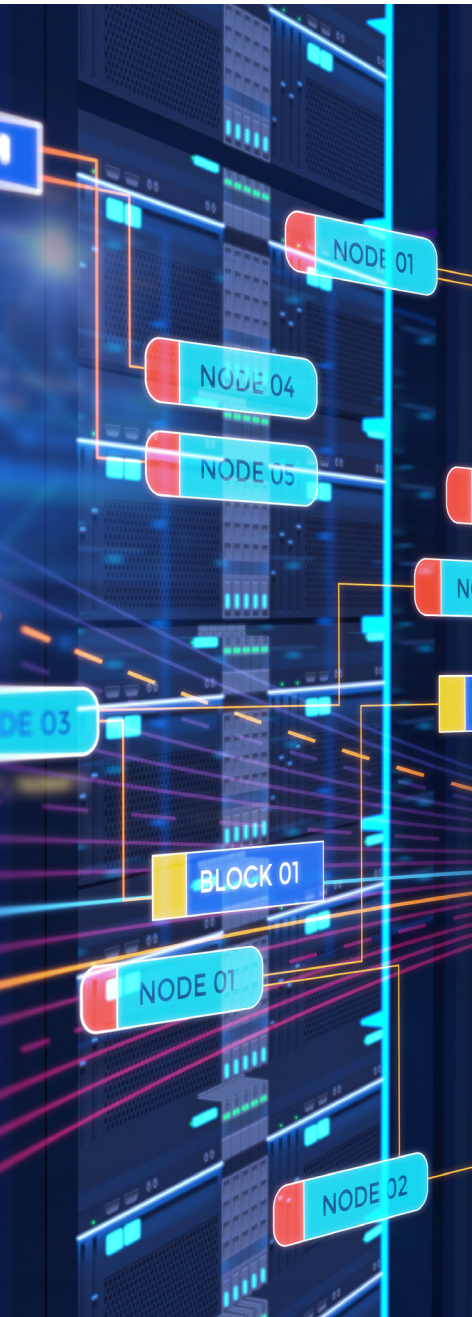
An increase in the population and the growing middle class will result in higher levels of urbanisation, resulting in a higher demand for resources. This will create a greater need for alternative green options (given the importance of conservation and resource-scarcity); hence traditional industries will see rapid restructuring, with energy and water demand forecast to grow by 50%<sup>5</sup> and 32%<sup>6</sup> respectively by 2030.

It is evident that global megatrends will increase the rate of change in Africa. As a result, the continent can expect greater changes in the next decade than the cumulative change over the past 25 decades. CEOs will have to take action to mitigate against workforce disruption and ask themselves what they can do to drive growth and remain relevant in this time of rapid evolution.

<sup>5</sup> Global CCS Institute , Investment and Generation Mix through 2030 under the Renewable Promotion Scenario

<sup>6</sup> World Wide Foundation Report, Water Facts and Future: Rethinking South Africa's Water Future, 2016





# Today's future is discontinuous, disruptive and different

## The competing forces shaping 2030



**Artificial intelligence (AI)** harnesses predictive analytics and is becoming the heartbeat of many businesses. AI is a portal of knowledge that businesses are tapping into to make effective decisions quickly.



The **Internet of Things (IoT)** allows humans, businesses and homes to become more connected and communicative. This will significantly change the way we live and work.



**New network-based logic (e.g. blockchain)** is creating a more effective way of managing organisations. It is enabling us to build a more private, secure, robust, and decentralised 'Internet of Trust'.



**Augmented and virtual reality (AR and VR)** the human-computer interface is a key nexus of innovation and connection, spanning time and geographical limitations.



**Quantum computing** could provide a leap in processing power that will fast-track breakthroughs we can hardly begin to imagine.

The digital age has advanced the speed of change, impacting all industries and revolutionising life as we know it.

The Internet of Things (IoT), machine learning and digital manufacturing are leading a technological revolution, re-engineering business models and ways of thinking. This transformation is rapidly ushering in the Fourth Industrial Revolution.

These are the competing forces changing the world we are living in:

- Blockchain's impact on digital identity;
- Augmented and virtual reality's ability to elevate 'experience' to a new dimension; and
- Quantum technology's potential to intensify such trends, resulting in limitless capacity and efficiencies.

These breakthroughs are not only changing the nature of work, but the fundamentals of business, by disrupting day-to-day activities.

The question businesses need to be asking themselves is:



How do we drive our thinking to succeed, prosper and thrive in times of radical transformation and innovation, and what propels the wheels of change?

# What Africa can expect in the next decade

PwC's 22nd Annual Global CEO Survey released in January 2019 reveals key trends and insights regarding the global and local business climate, in which the workforce of the future is highlighted as a threat to growth.<sup>7</sup>

## Key findings

### CEOs' are playing it safe

- Concerned about the ease of doing business in the markets in which they operate
- Expansion opportunities are internally orientated

Looking inside out for growth

01

Reality check

02

03

Minding the information and skills gap

### 12-month growth outlook

- 2017 saw an increase in optimism about global economic growth
- 2018 saw an increase in pessimism
  - 25% of African CEOs predict a decline in global economic growth
  - 23% are not confident about their own organisation's growth prospects

### Challenges

- CEOs are trying to bridge gaps
- Translating data into better decision-making
- Shortage of skilled labour

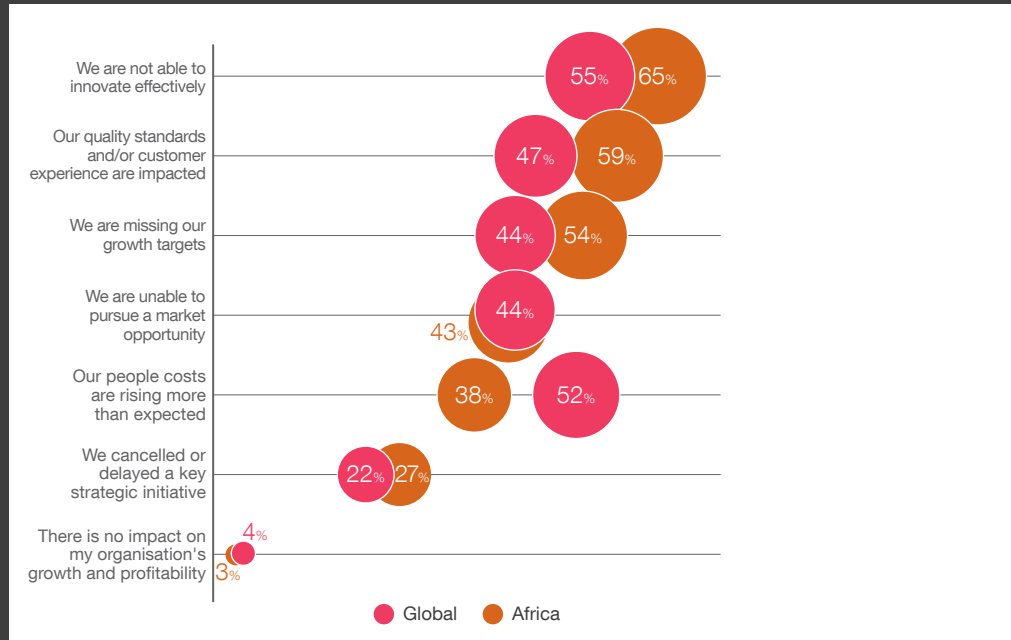
Source: PwC, 22nd Annual Global CEO Survey, 2019

During the next 12 months, CEOs in Africa say they will proactively seek to drive revenue growth through operational efficiencies (80%) and organic growth (76%). African CEOs cite insufficient understanding of the disruptive changes underway as the single biggest obstacle to future workforce planning and growth. Resource constraints and insufficient alignment of their organisations' talent strategies with their broader innovation strategies remain challenges. Collaboration between business and the education sector is also very limited.

The skills gap is a critical barrier to organisations successfully exploiting the promise of digital technologies, and more so in Africa.

<sup>7</sup> PwC, 22nd Annual Global CEO Survey, 2018

## Impacts of the skills gap



Source: PwC, 22nd Annual Global CEO Survey, 2019

Many organisations continue to struggle to translate an influx of data into better decision-making. A lack of analytical talent to translate data and analytics into usable and actionable intelligence has broad impacts on organisations. Even in South Africa, arguably Africa's most sophisticated economy, minimal resources have so far been invested in capitalising on the benefits of the Fourth Industrial Revolution.

CEOs in Africa identified the following mechanisms to close the skills gap and improve operational efficiencies:

- **47%** significant retraining / upskilling of the existing workforce (global: 46%);
- **22%** establish a strong pipeline direct from education (global: 17%); and
- **16%** hiring from outside the specific industry (global: 18%)

It is clear that CEOs should prioritise education and upskilling for the future to enable their workforces to succeed. With the momentum to future-proof labour forces still improving, CEOs in Africa say they have implemented the following initiatives:

- **60%** implemented continuing learning initiatives that include digital technologies;
- **56%** developed workforce plans that identified new skills and roles needed as a result of digital technologies;
- **47%** changed performance and development frameworks to include digital technology skills; and
- **44%** expanded the digital technology talent pipeline through internships and college and university partnerships.





## African opportunities to 'go digital'



### Mobile banking and other financial services

Africa has a high mobile and growing internet penetration and significant growth in coverage. African countries have the ability to offer banking services to individuals without access to brick-and-mortar banks.



### Agriculture

Population growth and urbanisation will demand higher levels of food production. There are opportunities to better utilise the continent's fertile land, in combination with agri-technologies, to meet local and export demands.



### Automotive and other manufacturing

Raw materials are available as input into manufacturing processes. Businesses should incorporate advanced robotics and human-machine collaboration to drive efficiencies. 3D printing makes it possible for local industries to construct specialised equipment and parts.



### Education and other basic services

A young and growing population is increasing the demand for education and training. Technology can be utilised to offer effective education to masses at low cost.



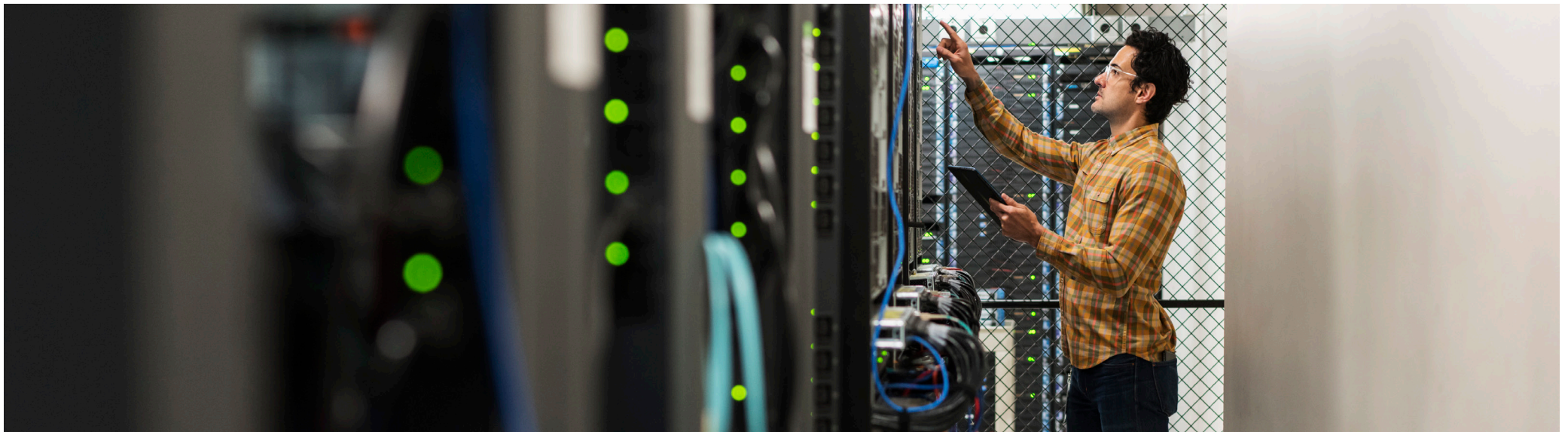
### Retail

Africa has a growing middle class with a higher level of disposable income. Online shopping is one of the fastest-growing channels.



### Green economies

There is a global push for renewable energy, and continued economic growth increases electricity demand. Technological advancements have the potential to decrease investment costs.



# Companies in Africa need to adapt to remain sustainable

While CEOs in Africa have identified initiatives to build a technology-ready workforce, PwC has framed the possible scenarios in which the future of work could play out:

- It's important to think about multiple visions of the future and plan for multiple scenarios.
- Scenarios that look at the push and pull of individualism versus collectivism and corporate integration versus business fragmentation.
- The competition between these forces are creating four scenarios ('worlds') for the future of work:



## Four possible future scenarios

The four worlds of work are distinctly different, but they are all impacted by digital technology. As more individual tasks and processes become automatable, jobs are being redefined and recategorised, resulting in a third of people worldwide worried about losing their job to automation.

### The Four Worlds of Work in 2030



The Yellow World Humans come first

Social-first and community businesses prosper. Crowdfunded capital flows towards ethical and blameless brands. There is a search for meaning and relevance with a social heart. Artisans, makers and 'new Worker Guilds' thrive. Humanness is highly valued.



The Red World Innovation rules

Organisations and individuals race to give consumers what they want. Innovation outpaces regulation. Digital platforms give outsized reach and influence to those with a winning idea. Specialists and niche profit-makers flourish.

Collectivism



The Green World Companies care

Social responsibility and trust dominate the corporate agenda with concerns about demographic changes, climate and sustainability becoming key drivers of business.

Individualism



The Blue World Corporate is king

Big company capitalism rules as organisations continue to grow bigger and individual preferences trump beliefs about social responsibility.

Fragmentation

Integration



### Workforce challenges associated with the four worlds of work

Workforce challenges	Red world	Blue world	Green world	Yellow world
Finding, sourcing and attracting talent	People with ideas and organisations with capital seek each other out in a vibrant online marketplace. Talent is attracted by a combination of financial reward and the opportunity to be involved in winning projects.	Organisations compete to find and secure the best talent available and use extensive search and evaluation methods to obtain future talent.	Companies seek like-minded individuals to extend their corporate family, taking great care to select only talent with the right behaviours and attitudes.	Companies use technology to explain their purpose and cause openly.
Role of technology	Technology powers the red world but performance is judged primarily on short-term results	Sensors and data analytics measure and optimise performance continuously	Technology helps people build work into their lives and minimise their environmental impact	Technology creates and supports the open, honest, collaborative community of the yellow world



Source: PwC, *Workforce of the Future: The competing forces shaping 2030*, 2018

Companies should be cognisant of agile employee profiles that could drive the organisation forward in one or more of the various dimensions represented in one of the four worlds. The employees of the future are diverse in their profiles and organisations need to be agile in order to attract and retain this new workforce. Companies that innovatively rethink their organisational design, in a digitally-enabled world, will have a competitive advantage.



## The future of jobs

An estimated 15 to 20m increasingly well-educated young people are expected to join the African workforce every year for the next three decades. Delivering the quality of jobs to fully leverage the continent's demographic opportunity is set to be one of Africa's defining challenges over the coming years. Simultaneously, the Fourth Industrial Revolution will create a range of additional socio-economic and demographic impacts, resulting in major disruptions to labour markets, growth in new occupations, ways of working, skill requirements and tools to augment workers' capabilities.

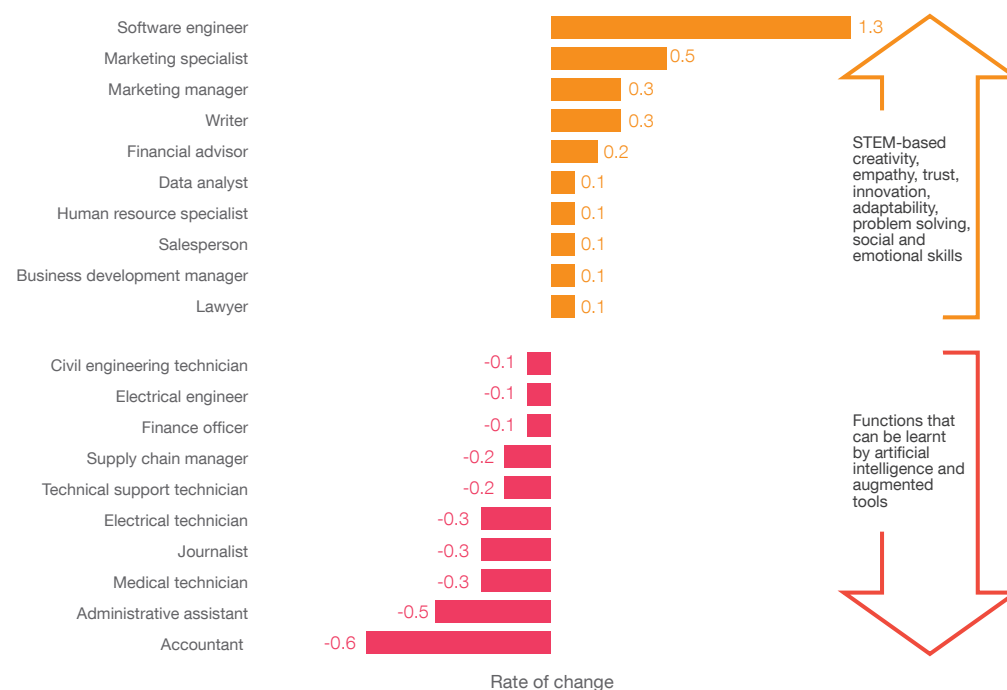
Large numbers of employers in Africa are citing inadequately-skilled workforces as a major constraint to business expansion and growth as a result of:

- A mismatch between the number of young educated jobseekers and the availability of formal, high-quality jobs; and
- Young people being inadequately-prepared for future job roles.<sup>8</sup>

Smart technologies and digitalisation are shaping our lives and ways of working. Technology adoption, in both the formal and informal sectors, is imperative to business and its growth. By enabling greater efficiency, opportunity and profitability, the adoption of new technologies will differentiate the various skills, roles and jobs required.

While employers are looking for talent with higher levels of emotional intelligence, resilience, empathy and integrity, these attributes are rarely evident in the newly-qualified workforce. As the impact of digital technology grows, employees who perform tasks that machines cannot are becoming more valuable. This emphasises the importance of soft skills, which machines cannot emulate, and raises the question: Which jobs are safe from digital replacement?

### Top ten emerging and declining roles, as observed in recruitment trends in Africa, 2014-2017



Source: World Economic Forum, *The Future of Jobs Report 2018*

While Africa's rapid economic growth and dynamic young population hold much promise, challenges remain when it comes to the creation of quality, formal-sector jobs. Africa has great potential for high labour force participation, but the creation of quality formal sector jobs remain a challenge.

Although disruptions such as automation will impact the nature of jobs and the skills required, they will also create opportunities and demand for new roles – creating a net positive growth trajectory for Africa. However, these 'new' roles will require a 'new' skill set and approach in a dynamic environment.











Demand for STEM-based roles will increase, but so to will those requiring creativity, empathy, trust, innovation, adaptability, problem solving, social and emotional skills.

<sup>8</sup> World Economic Forum, *The future of jobs and skills in Africa*, May 2017 - <https://www.weforum.org/reports/the-future-of-jobs-and-skills-in-africa-preparing-the-region-for-the-fourth-industrial-revolution>

## Future skills and competencies

It is imperative for employees of the future to demonstrate skills that machines cannot learn. A premium will be placed on non-cognitive, character skills, as opposed to routine learning and knowledge-based skills. It will no longer be about 'what you know' but more about 'what you do' with that information, through the utilisation of value-based competencies, that will enable employees to remain relevant in this digitally-enabled workforce.

### *The top-ten most sought after skills for the future workforce*

Sense-making	Social intelligence	Novel – adaptive thinking	Cross-cultural competency	Computational thinking	New media literacy	Trans-disciplinarity	Design mind set	Cognitive load management	Virtual collaboration
1	2	3	4	5	6	7	8	9	10
Ability to determine the deeper meaning or significance of what is being expressed	Ability to connect with others in a deep and direct manner i.e. to sense and stimulate reactions and designed interactions	Ability to come up with solutions and responses beyond that which is rule-based	Ability to operate in different cultural settings	Ability to translate vast amounts of data into abstract concepts	Ability to critically analyse and develop content that uses new media forms and to leverage media for persuasive communication	Ability to understand concepts across multiple disciplines	Ability to represent and develop tasks and work processes for desired outcomes	Ability to discriminate and filter information for importance, and to understand how to maximise cognitive functioning using a variety of tools and techniques	Ability to work productively, drive engagement and demonstrate presence as a member of a virtual team
									

From blockchain to flexible working hours and virtual work spaces, the African workforce of 2030 will emphasise innovation and empathy and embody a purpose-driven cohort. Africa will be housing a new workforce that is unique in its composition, demographic and mindset.

This workforce will not be confined by degrees or titles and their expectations of employment will be different to previous generations. As a result, employers will not be seeking rigid qualifications, but behavioural competencies. Fundamental paradigm shifts are already taking place regarding how talent is defined in fulfilling organisational requirements.



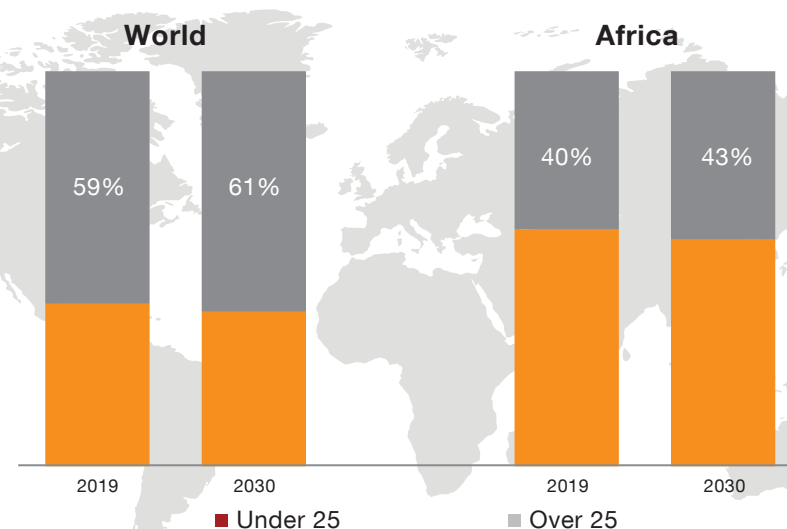
# Underlining requirements: Africa's workforce of the future

## Africa's labour conundrum

### *Africa remains young while the world ages*

Africa has the world's second largest youth demographic, after Asia. By 2030 Africa will be home to more than a quarter of the world's under-25s, which will make up almost 60% of its total population. From now until 2030, Africa is projected to expand the size of its workforce by more than the rest of the world combined, as its young population (the best-educated and globally connected the continent has ever had) enters the world of work.

### *Global and African population segments as a percentage of total population, 2030<sup>9</sup>*



Africa's under-25 population will increase by 23% from 785m (2019) to 970m (2030), while the rest of the world grapples with an ageing population, placing immense pressure on businesses, social institutions and economies. The under-25 segment will grow faster than the availability of jobs in Africa, where already the World Economic Forum reports that sub-Saharan Africa utilises just 55% of its human capital in comparison to a global average of 65%.<sup>10</sup>

To mitigate against staggering unemployment rates, Africa will need to utilise this demographic dividend to drive growth and inclusion through the creation of quality jobs and the provision of accessible education. If current trends persist, just one-in-ten young Africans will be on track to gain basic secondary-level skills by 2028.

## Education and skills shifts

The quality and ability of Africa's education systems to meet the needs of a competitive economy remain a concern.<sup>11</sup> The continent's education systems rank significantly below the global average, suggesting that learners are not obtaining the knowledge and skills required for today's economies and societies. This is further corroborated by business leaders' concerns about the difficulty of finding skilled workers for their businesses.

<sup>10</sup> World Economic Forum, The Future of Jobs and Skills Africa: Preparing the Region for the Fourth Industrial Revolution, 2017

<sup>11</sup> World Economic Forum's Executive Opinion Survey - [http://www3.weforum.org/docs/WEF\\_EGW\\_FOJ\\_Africa.pdf](http://www3.weforum.org/docs/WEF_EGW_FOJ_Africa.pdf)

### Higher education megatrends



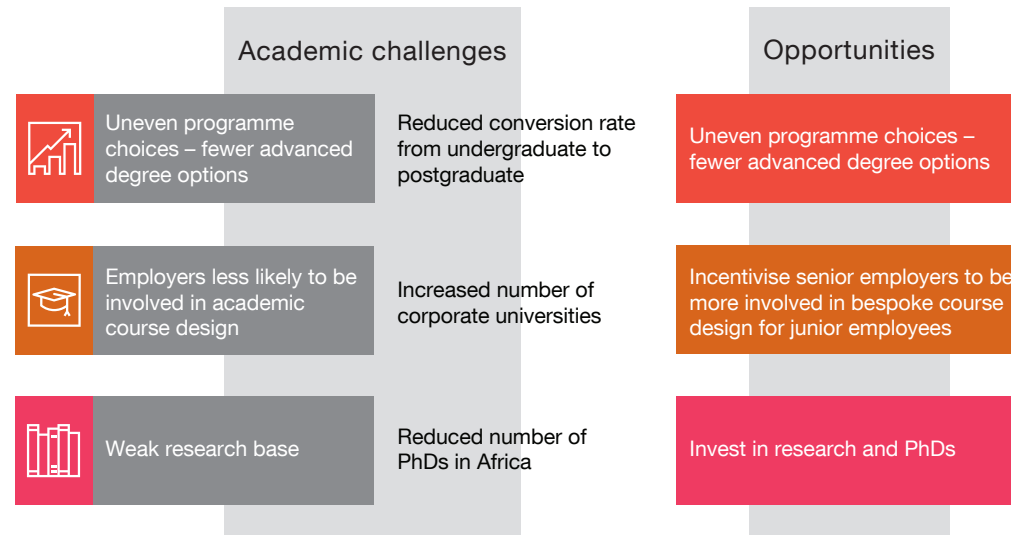
The job market calls for a paradigm shift – the need for a highly technologically-driven workforce necessitates a shift in skills and educational requirements. Academic institutions in Africa need to prioritise data, technology and human literacy to produce ‘robot-proof’ graduates. This can be achieved through increased writing skills, peer reviews, diverse classrooms, divergent thinking and intellectual entrepreneurship.

### Possible actions to uplift skills

The current spread of education and skills across generations, and the expected future trajectory of jobs, point to particular strategies for Africa to ensure that it is prepared for the labour markets of the future.

The workforce of the future will cause many challenges, but will also present many opportunities.

### The workforce of the future: Opportunities and challenges



Once employers in Africa understand their capacity and capability requirements, they need to take a proactive and integrated approach to attracting new skills and developing the existing workforce through upskilling programmes and collaboration with academic institutions to mitigate against workforce disruption.

## South African workers eager to upskill in the face of increasing automation and rising unemployment

- **70%** South African workers feel positive about the future impact of technology on their jobs
- **56%** of South African adults worry that automation is putting jobs at risk, but when asked about their current job specifically, only **16%** said they were nervous or scared about the future impact of technology, with women feeling more nervous/scared than men (21% vs. 12%)
- Over **54%** of workers think their job will be significantly changed or made obsolete by automation in the next 10 years
- **91%** of workers think that technology will change their day to day work for the better and **73%** think that technological developments will improve their future job prospects - only **24%** think it will impede them
- **75%** say their employer is giving them the opportunity to improve their digital skills but only **34%** say that there are many opportunities
- **46%** say their employer is giving them opportunities and **35%** say that they are being given many opportunities

## Future-ready strategies

Many companies are desperately looking for candidates to fill their increasing job vacancies. Meanwhile, millions of unemployed, overqualified or under-skilled workers do not, or no longer, have the relevant skill sets required to fulfill specific roles. To tackle this phenomenon, PwC has been extensively researching the evolving work environment and developed the UPskill solution to help industry leaders and national representatives grow a competitive talent pool to drive innovation.

The integrated UPskill ecosystem has been developed to support organisations in defining their future workforce, taking into account the impact of digital technologies on the organisation's strategy. Where most workforce-planning solutions focus on identifying gaps and strategies to reduce those gaps, PwC's UPskill solution provides a platform across the value chain, from strategy to execution, to prepare the workforce to be fit for purpose for the future world of work.

The paradigm shift from 'long-term employment' to 'long-term employability' requires an innovative demand-driven approach, a common vision, and scalable tools facilitate new models that better support skills development.

## UPskill enables collaboration between government, business and society

UPskill outlines strategies, actions and policies that enable government, business and society to work together to ensure a sustainable and prosperous future for all.

### Collaboration brings tangible benefits

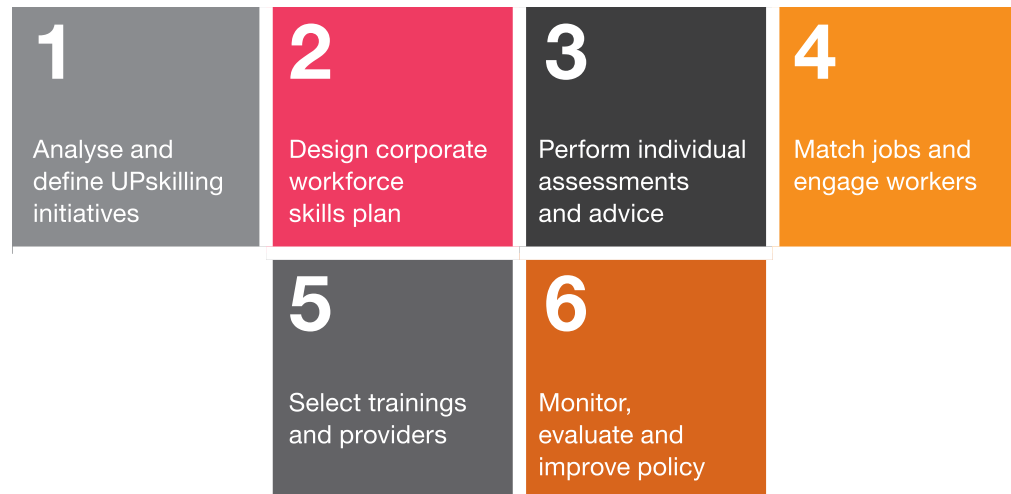


Upskilling refers to the acquisition of new skills. It implies an individual's intent to extend their capabilities, to acquire new competencies (soft, digital and technical) and to increase their employability. It suggests less dependency on market conditions, increased added-value, and ultimately a more positive future.



To be successful in the future, companies and their people need to be comfortable operating in an environment where change is the only constant. PwC helps companies build a culture of innovation and growth through the six steps of the UPskill solution, as illustrated below.

### Steps of the UPskill solution



### Benefits of upskilling

#### Employee retention

Investing in your employees' learning development sends them the message that they are worth the investment



#### Succession planning

Provides employees with training, knowledge and experience to step into leadership roles



#### Talent attraction

An upskilling culture attracts talent who values learning opportunities



#### Increased productivity

Upskilling provides employees with additional skills that will lead to completing tasks quicker



#### Employee satisfaction

Investing in your employees makes them feel valued and important to the organization increasing their satisfaction



#### Creates a culture of learning

Through continual learning, organizations can create a learning culture which leads to greater success and knowledge





# Message for African leaders

Africa's economies, like its peoples, are diverse. Such diversity creates opportunity, which can be capitalised on in the face of change and adversity. The Fourth Industrial Revolution will have a disruptive effect on all economies and there are several things that we in Africa can consider as we strive to thrive in the face of disruption:

## 1 Skills, partnerships and opportunities

- Embrace technology as a force of good as it will affect every level of the business and its people. A depth of understanding and keen insights into the changing technology landscape is needed.
- Leaders need to prepare their employees today for the future opportunities and skills required for the future workforce. This can be effectively executed through public-private partnerships, which are powerful tools for change.
- The development of digital skills is paramount and while all industries are being digitally disrupted, it's also an opportunity for a growing digital economy.

## 2 Nurture the right skills

- Automation will affect every level of the business and its people.
- Nurturing the right talent will ensure that we correctly capitalise on the right skills for businesses throughout Africa.

## 3 Importance of the human element

- Focus on the humans. Organisations should prioritise people rather than jobs.
- Jobs can always be created and modified, but the right human capital cannot.
- Nurture agility, adaptability and re-skilling.

## 4 Improving workforce digital IQ

- As people live and work longer, digital training and retraining of existing workforces is particularly crucial.

## 5 Flexibility allows creativity to flourish

- Make decisions based on values and purpose. Plan for a dynamic future and ensure adaptability and flexibility in workforce solutions.
- Create a continuous learning culture.

## 6 Experiment

- Lead by example in the face of adversity and transition.
- Utilise and optimise challenges to drive change in Africa.
- Plan for a dynamic rather than a static future.

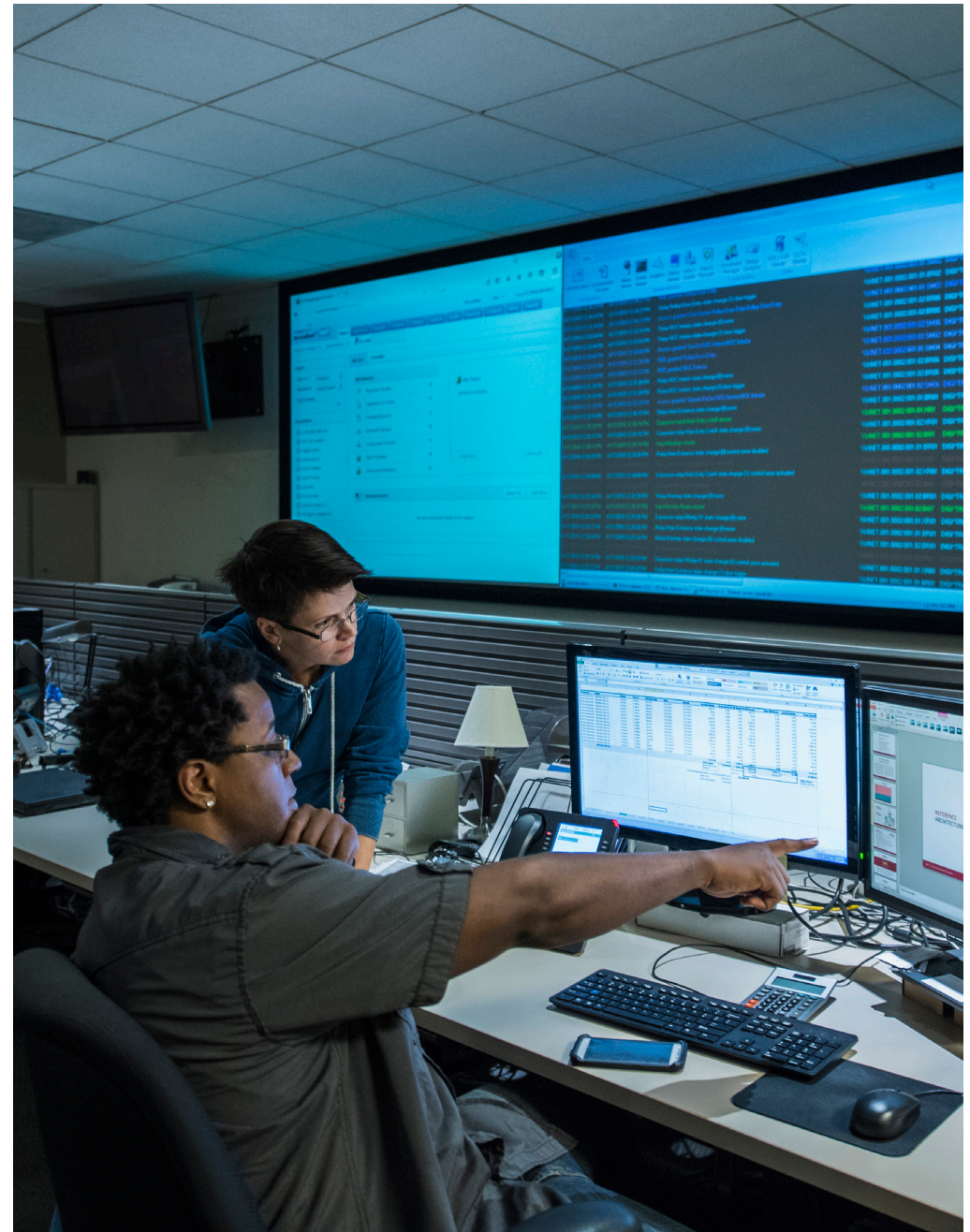


Digital technologies can enable Africa to release its full creativity, inventiveness and innovativeness. Regardless of sector or occupation, new work formats are offering individuals and entrepreneurs new opportunities.

By leveraging the demographic opportunity, Africa has the potential to unlock exceptional opportunities:

- Realising new economic possibilities created by future industries and labour markets.
- Dramatically raising labour productivity and per-capita incomes.
- Diversifying its economies.
- Becoming an engine for stable economic growth, highly-skilled talent and job creation

It is imperative for both the private and public sectors to invest in building, not just skills, but a talent pipeline for future skills. Africa's current and future workforce requires a deliberate policy approach, private sector commitment and institutional reforms.





## Contacts



**Luizet Ruzow**

Director, Strategy&  
+27 0 (11) 797 5544  
luizet.ruzow@pwc.com



**Barry Vorster**

Director, People & Organisation  
+27 0 (11) 797 4864  
barry.vorster@pwc.com



**Elanie Broekman**

Senior Manager, Strategy&  
+27 0 (11) 797 4023  
elanie.broekman@pwc.com



**Maura Jarvis**

Associate Director,  
People & Organisation  
+27 0 (41) 391 4563  
maura.jarvis@pwc.com

### Contributions

We are extremely grateful to Suvania Rajah-Gangaram for her contribution to this report.

### About Strategy&

Strategy& is PwC's integrated strategy consulting offering, focused on uniting strategy and execution to deliver immediate impact and lasting value. Strategy& is a global team of practical strategists committed to helping you seize essential advantage. We do that by working alongside you to solve your toughest problems and helping you capture your greatest opportunities.

These are complex and high-stakes undertakings – often game-changing transformations. We bring 100 years of strategy consulting experience and the unrivalled industry and functional capabilities of the PwC network to the task. Whether you're charting your corporate strategy, transforming a function or business unit, or building critical capabilities, we'll help you create the value you're looking for with speed, confidence and impact.

## NOTES:

[illegible]

## NOTES:

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.







***www.pwc.co.za***

At PwC, our purpose is to build trust in society and solve important problems. We're a network of firms in 158 countries with over 250,000 people who are committed to delivering quality in assurance, advisory and tax services. Find out more and tell us what matters to you by visiting us at [www.pwc.com](http://www.pwc.com).

© 2019 PwC Inc. [Registration number 1998/012055/21] ("PwC"). All rights reserved.

PwC refers to the South African member firm, and may sometimes refer to the PwC network. Each member firm is a separate legal entity. Please see [www.pwc.co.za](http://www.pwc.co.za) for further details.

(19-24430)