



TALENT KLIMA INDEX

Talent Climate Index

Results – Second half of 2021

In the spotlight: Shaping the new world of work



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Executive Summary



- The Talent Climate Index (TCI) serves as an indicator for the development of the labor market in Germany from a company point of view both in terms of internal and external talent (leaders and specialists).
- Using few precise questions, the current situation and the expected trend are ascertained ([Talentklimaindex.de](https://www.talentklimaindex.de)). Biannual surveys enable a continuous long-term evaluation.
- The results of the survey for the second half of 2021 are presented here. They are based on a sample of 115 usable data sets, consisting of HR experts, managers, and members of the top management. This results in the following key findings:

- **Talent climate at pre-corona level**

After a brief temporary easing, the talent climate has reached a negative level comparable to the situation before corona. The talent situation has deteriorated significantly, particularly on the external labor market. There is no recovery in sight. On the contrary, the situation on the external labor market is expected to deteriorate further.

- **Shaping the hybrid world of work: Focus on working hours and mobile working, need to catch up on "soft" aspects and productivity assurance**

At present, the hybrid world of work has not yet become attractive enough to serve as a positive differentiating factor for retaining or attracting talent. The focus of companies is primarily on practical regulations regarding working hours and mobile working. So far, only some of the "soft" aspects that contribute to a sense of purpose or good leadership and collaboration have been implemented or are in the planning stage. At the same time, hardly any measures are in place to ensure productivity or save costs.

- **Up to 5 days of mobile working possible, 2 – 3 days typical**

Almost one-third of respondents who have made arrangements for future mobile working allow their employees to work from home on 2 – 3 days per week. In 17% of the companies, however, up to 5 days of mobile working per week are possible.

Content

1. In the spotlight: Shaping the new world of work

2. Overall trends over time

- Talent climate trend
 - Commitment climate trend
-

3. Current situation and expected development

- Current talent situation and expected development
 - Commitment situation and expected development
 - Current talent and commitment climate
-

4. Appendix:

Explanations on the TCI and the data collection

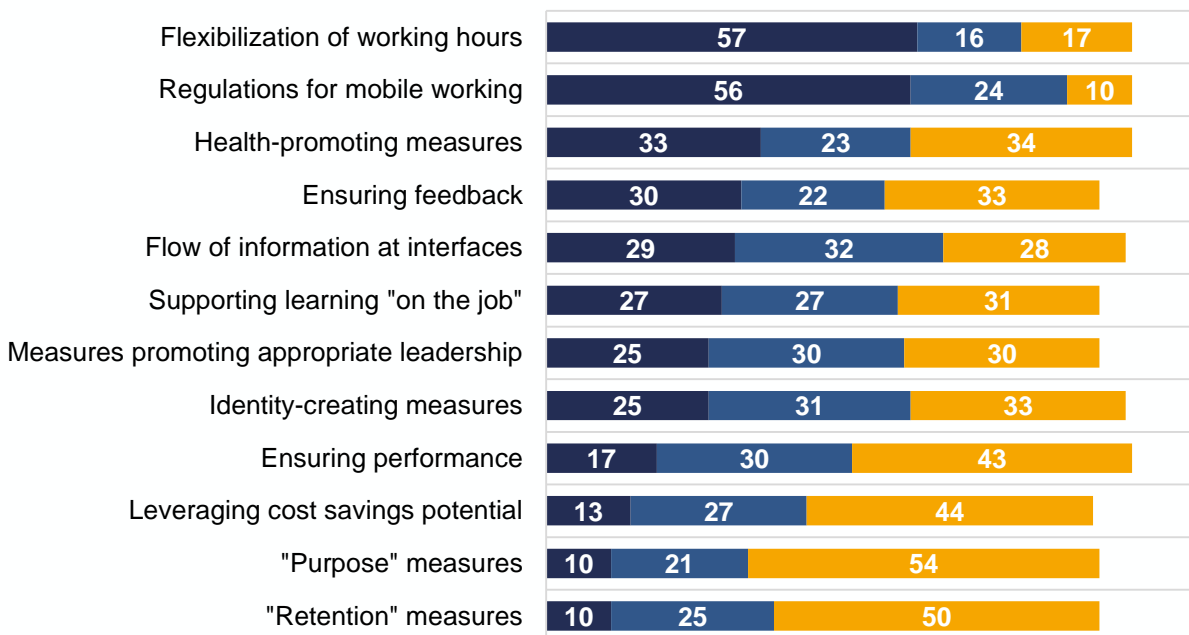
In the spotlight: Shaping the new world of work

Focus on working hours and mobile working

The focus of companies with regard to measures to shape the new hybrid world of work is on the practical regulations governing working hours and mobile working. Many have also taken measures on the "softer" aspects – such as ensuring feedback and the flow of information – or are currently developing these measures. However, these measures are still significantly less advanced overall. At the same time, leveraging potential savings and securing work performance and productivity in connection with the new world of work also still play a very subordinate role at present.

Measures to shape the new world of work

(Ø in % agreement, excluding no replies)



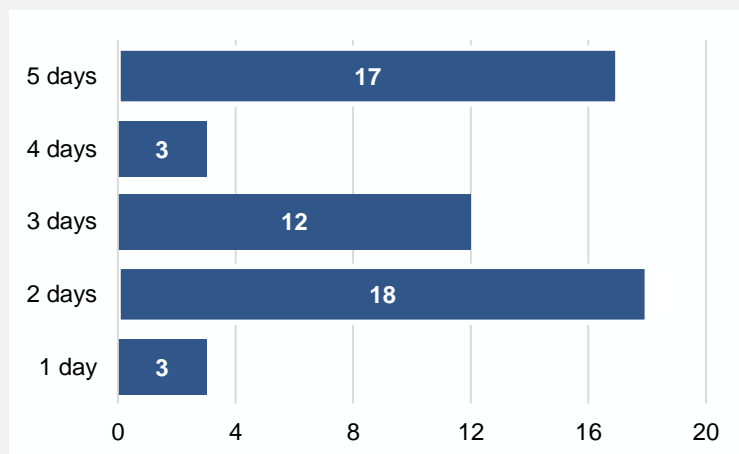
■ Measures introduced ■ Measures being developed ■ No measures taken

In the spotlight: Shaping the new world of work

Up to 5 days of mobile working possible in many companies, 2 – 3 days typical

The number of days that employees will continue to be able to work from home varies greatly from company to company. There is a focus on more defensive arrangements with 2 days of mobile working per week (18%), but there is also a focus on purely mobile working with up to 5 days per week (17%). If the group of companies that allow 2 – 3 days of mobile working is considered as a whole, however, it can be stated that this is a typical offer to employees with a total of 30% of respondents.

Possible mobile working days per working week (Ø in % agreement, excluding no replies)

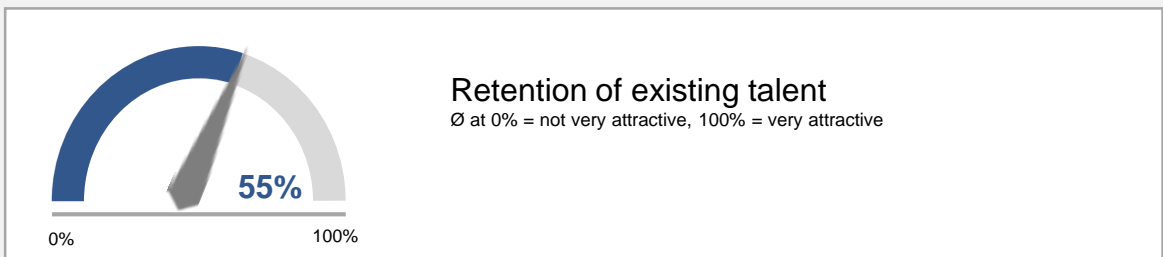


In the spotlight: Shaping the new world of work

Shaping of the world of work often not yet a positive attraction factor for talent

On average, the respondents do not yet rate the shaping of the hybrid world of work in their companies as attractive enough to be able to refer to it as a positive differentiating factor for retaining or attracting talent. There are significant differences in the individual assessments. On average, however, the respondents rate the shaping of their future work environment as neutral in terms of retaining or attracting talent.

Overall positioning of the company with regard to the future work environment



Content

1. In the spotlight: Talent in times of crisis

2. Overall trends over time

- Talent climate trend
 - Commitment climate trend
-

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- Current talent situation and expected development
 - Commitment situation and expected development
 - Current talent and commitment climate
-

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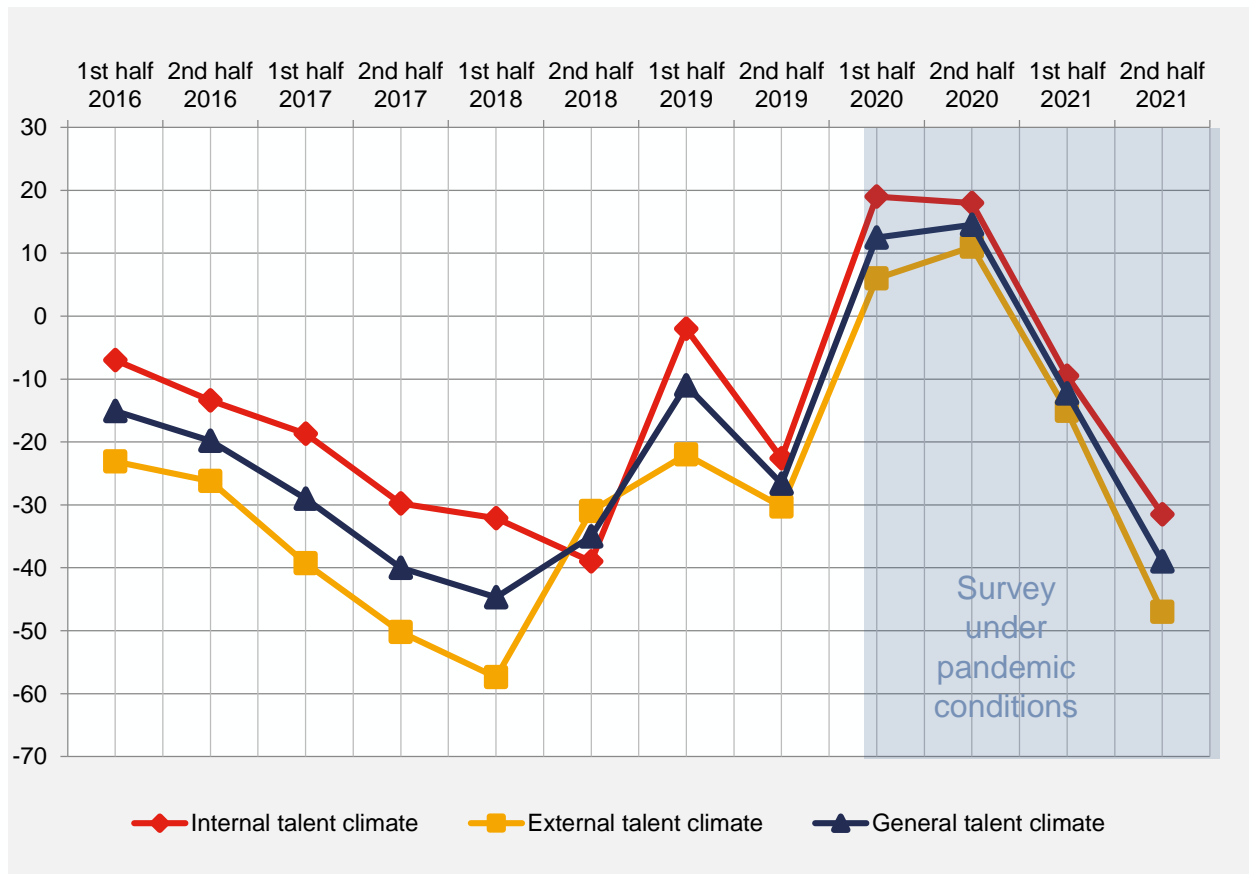
Explanations on the TCI and the data collection

Talent climate trend

Talent climate at pre-corona level

Even though the COVID-19 pandemic continues, the negative trend that was already clearly evident in the first half of the year is continuing: Internal and external talent is even less available at the end of 2021 than in the middle of the year. The talent climate has reached a negative level comparable to the situation before corona.

Talent climate* over time



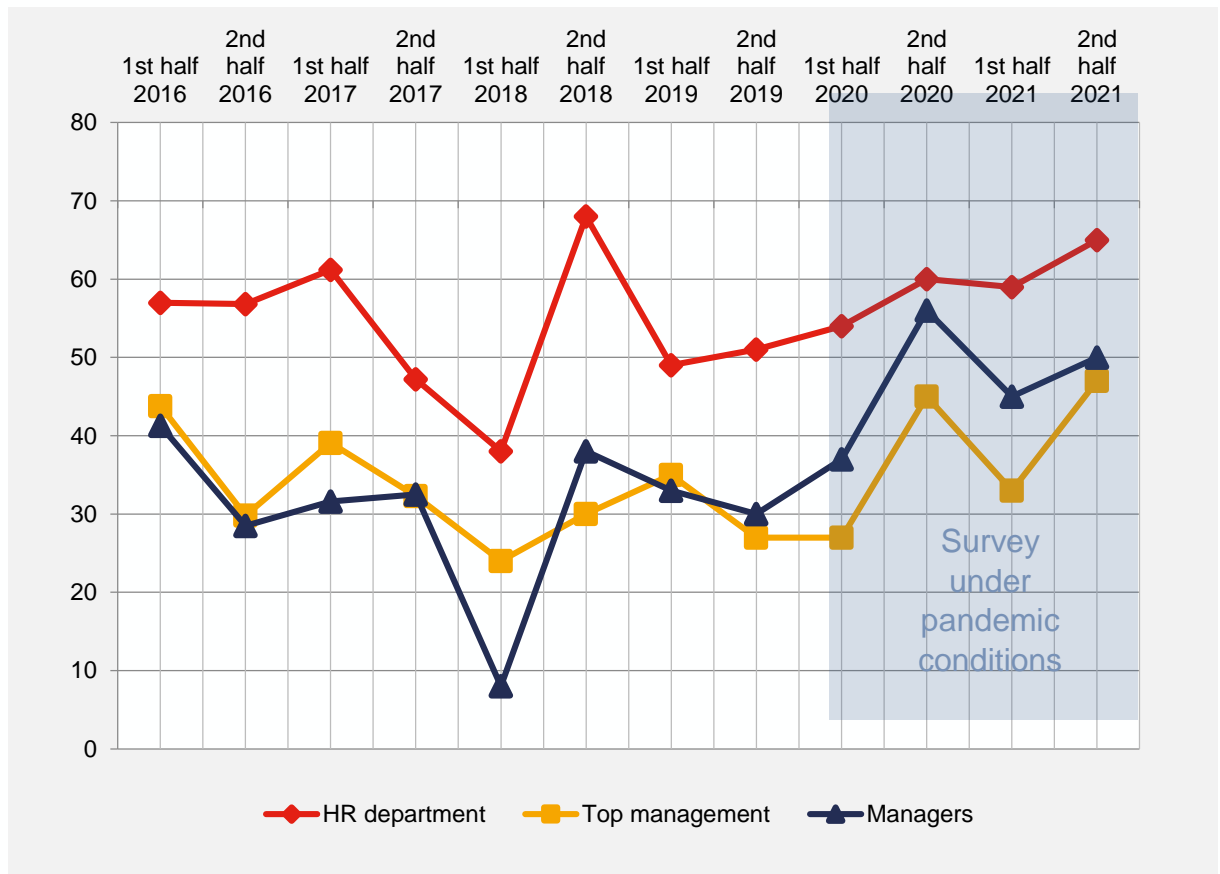
* Values stated on a scale of -100 to +100. The talent climate results from a combination of current and expected assessments (exact calculation see appendix)

Commitment climate trend

Talent management commitment generally on the upswing

The willingness to invest time and money in talent management activities is once again very high among all groups of people responsible. The commitment climate has even reached an all-time high in the HR departments. But also the top management's and managers' commitment has rarely been as high as it is at present. The difficulties in attracting talent are clearly noticeable for everyone involved and are triggering pressure to act.

Commitment climate* over time



* Values stated on a scale of -100 to +100. The commitment climate results from a combination of current and expected assessments (exact calculation see appendix)

Content

1. In the spotlight: The impact of the coronavirus pandemic on the labor market

2. Overall trends over time

- Talent climate trend
 - Commitment climate trend
-

3. Current situation and expected development

- Current talent situation and expected development
 - Commitment situation and expected development
 - Current talent and commitment climate
-

4. Appendix:

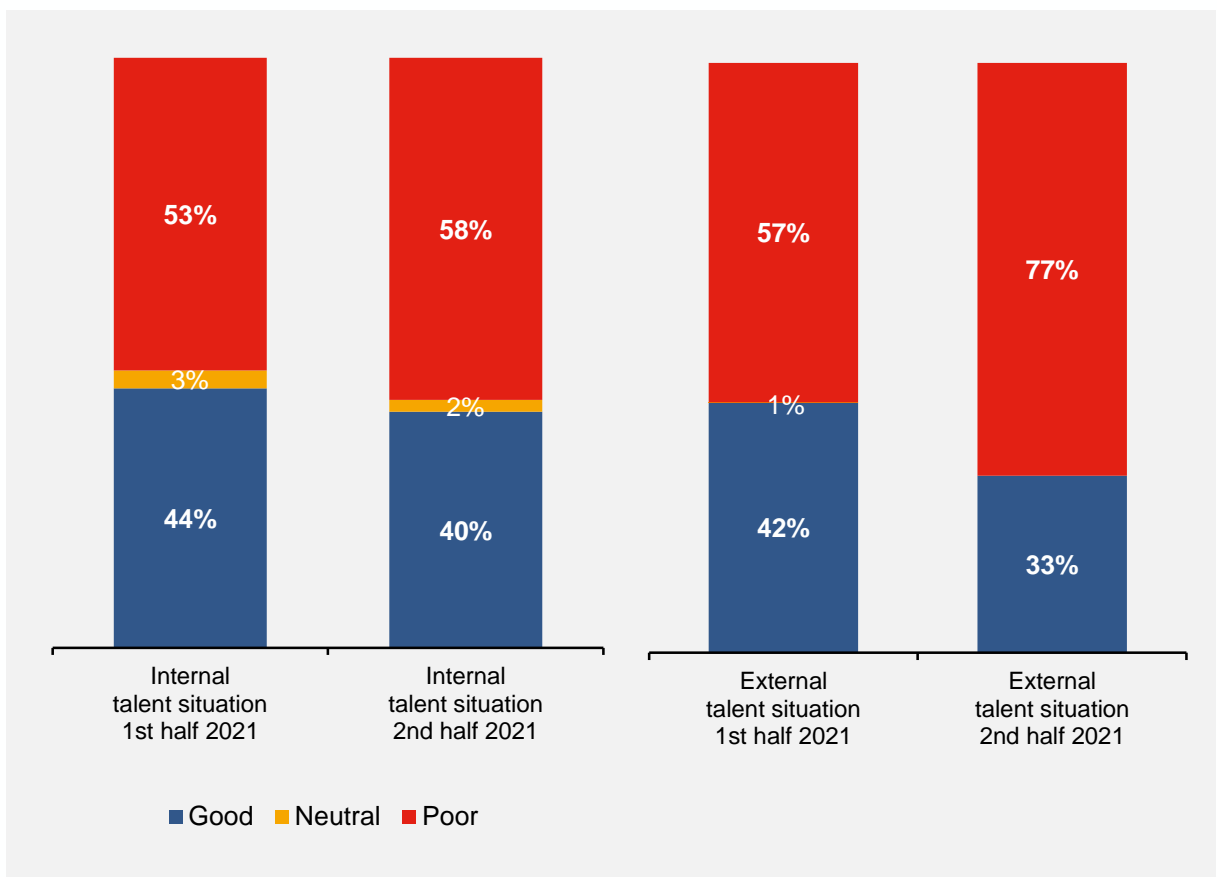
Explanations on the TCI and the data collection

Talent situation

Talent situation deteriorates significantly, particularly on external labor market

Both the internal and external talent situation have deteriorated compared with the first half of 2021. However, the impact on the external labor market is particularly drastic. Whereas in the first half of the year, 58% of respondents rated the situation as poor, in the second half of the year 77% already gave a negative assessment. Only one third of respondents still rate the availability of talent on the external labor market as good.

Talent situation: Current availability of talent

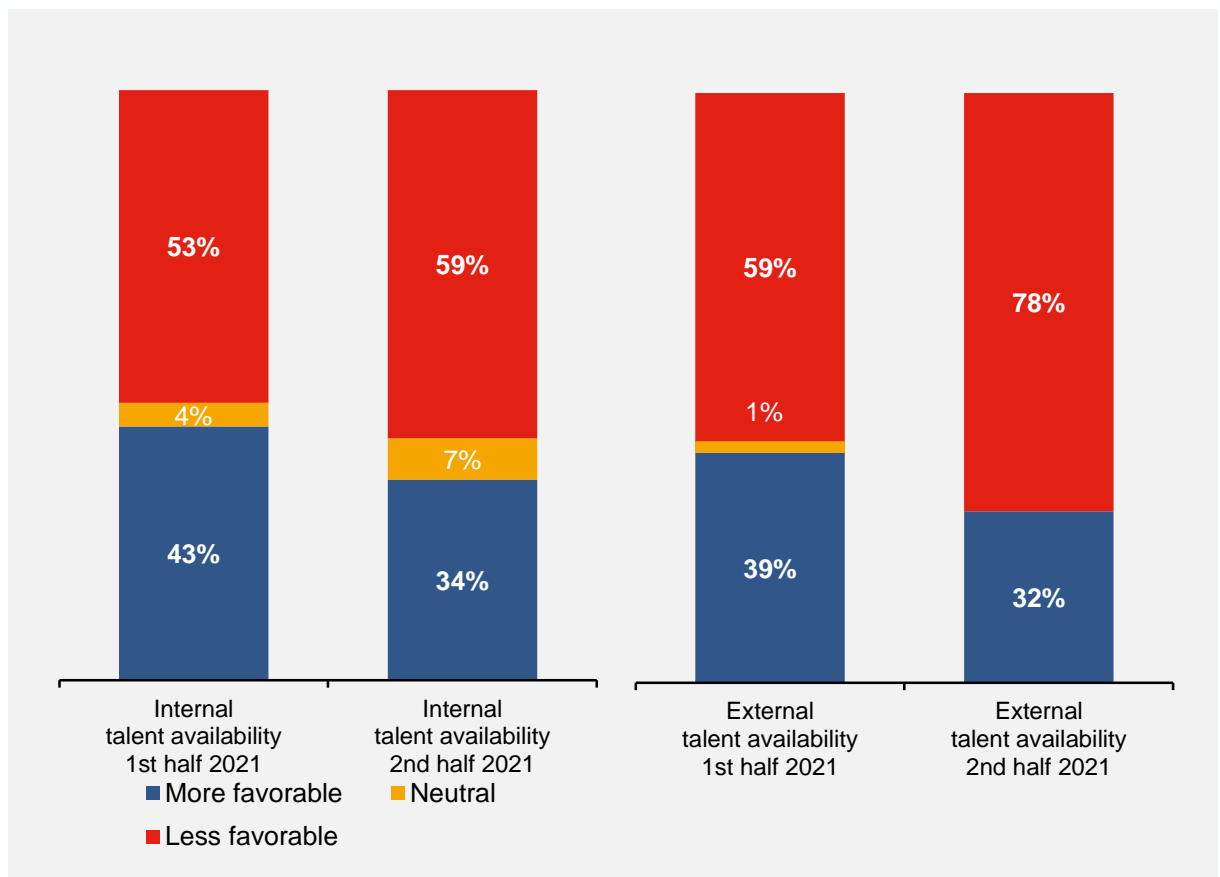


Talent expectations

Significantly worse forecasts for the further development of talent availability

The forecasts for talent availability show a similar picture to the assessment of the current critical situation: Respondents forecast talent availability to continue to deteriorate, and this is particularly true for recruitment from the external labor market. In other words – in the eyes of the respondents, talent availability is not only critical, it will become even more acute in the future.

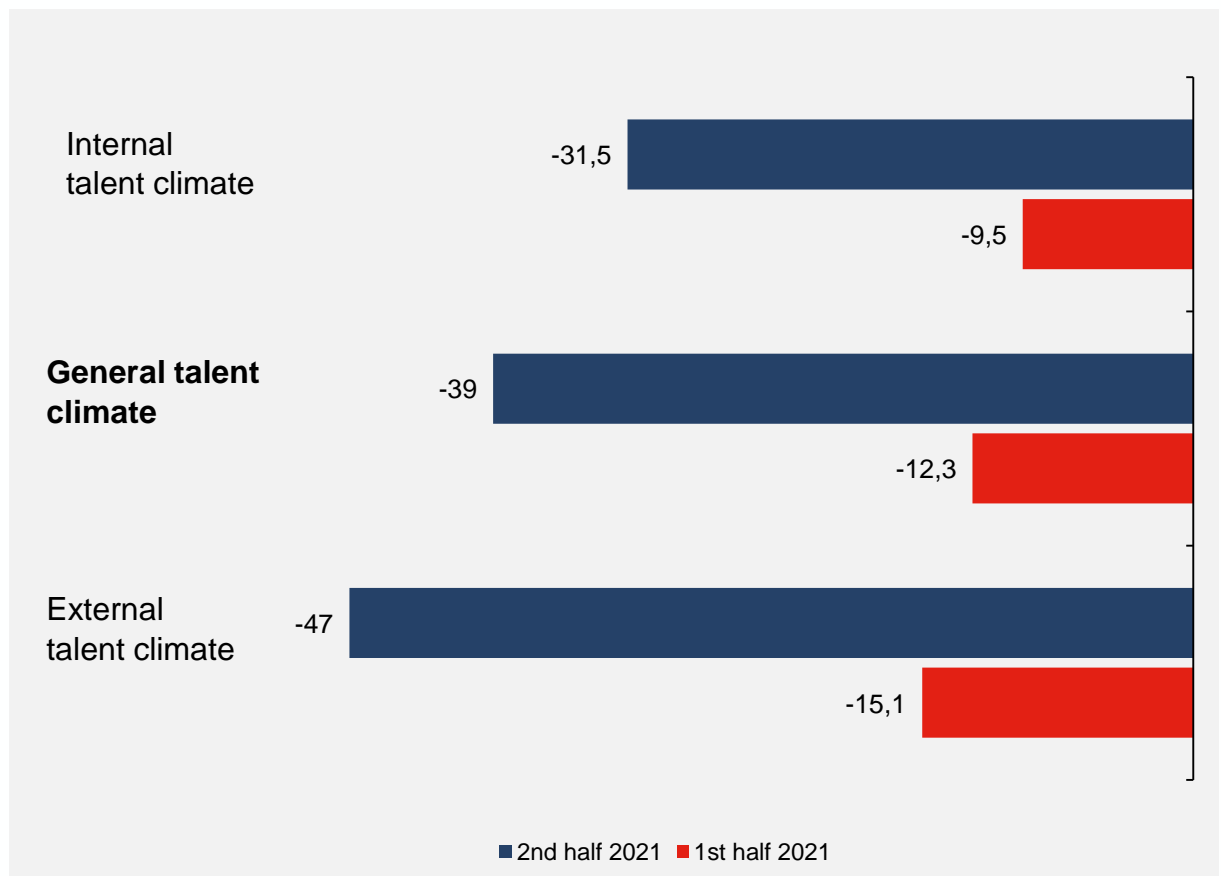
Talent expectation: Future availability of talent



Talent climate

External talent climate clearly negative as a result of current situation and forecast

The change of sign of the TCI at the beginning of the corona pandemic in the meantime seems to have receded into the distant future. In particular, the external talent climate stands out as clearly negative compared with the previous half-yearly assessment.



Values stated on a scale of -100 to +100*

* The talent climate results from a combination of current and expected assessments (exact calculation see appendix)
- 100 means that all those surveyed assess the situation to be poor/expect it to get worse
+100 means that all those surveyed assess the situation to be good/expect it to get better

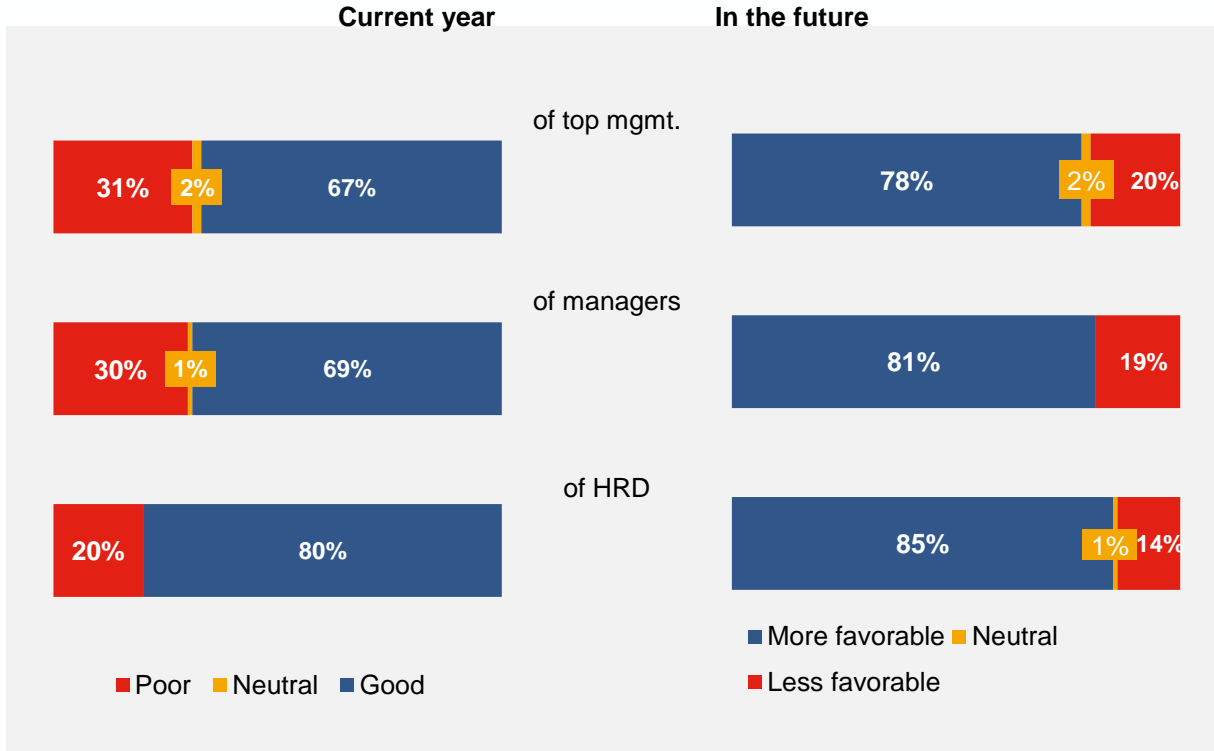
Commitment situation and expectations

Strong talent management commitment will continue to increase

Talent management commitment is pronounced among all groups responsible. As in all previous surveys, the HR departments' commitment to talent management is the highest. At the same time, the respondents forecast an even greater willingness to invest in talent management in the future, in line with the further deterioration of the talent situation.

Talent management commitment

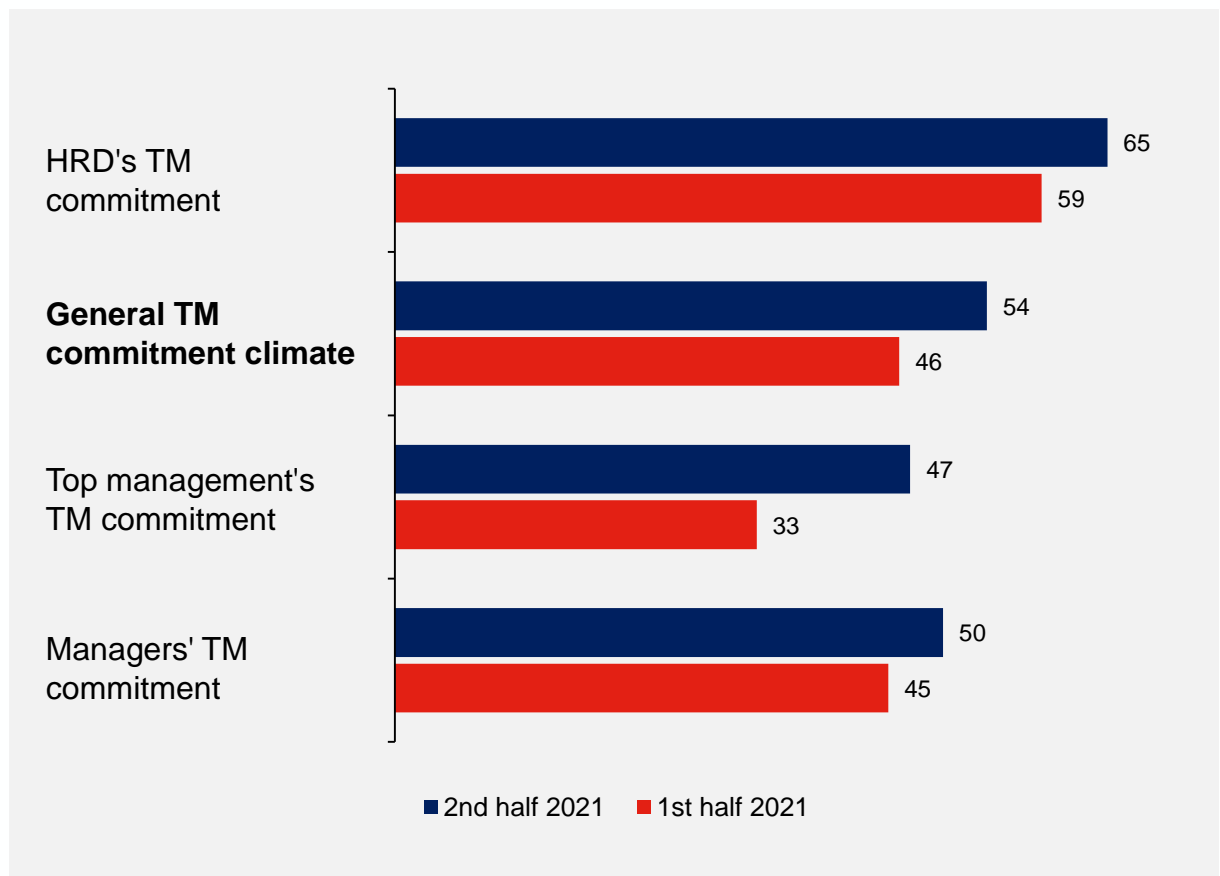
Current and future commitment to invest resources (time and money) in talent management



Commitment climate

Talent management commitment on the rise among all groups of people responsible

As a clear trend, the commitment climate has developed positively among all groups of people responsible compared with the previous survey. The positive trend is particularly clear among the top management, so it can be assumed that talent management issues will be given greater consideration as part of corporate strategy and central budget decisions.



Values stated on a scale of -100 to +100*

* The commitment climate results from a combination of current and expected assessments (exact calculation see appendix)

- 100 means that all those surveyed assess the situation to be poor/expect it to get worse
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Talent Climate Index (TCI)



The Talent Climate Index (TCI) serves as an indicator for the development of the labor market in Germany from a company point of view both in terms of internal and external talent.

Using few precise questions the current situation and the expected trend are ascertained ([TalentKlimaindex.de](https://www.talentklima.de)). Biannual surveys enable a long-term evaluation.

Subject areas of the questionnaire

- **Internal talent management:**
 - The availability of talents for key specialist and leadership positions in the internal labor market – currently and in the future
 - The company's ability to identify and develop internal talent
- **External talent management:**
 - The availability of talents for key specialist and leadership positions in the external labor market – currently and in the future
 - The company's ability to attract external talent
- **Talent management commitment:**
 - The commitment to invest time and money in internal and external talent management
- **Focal topic of the current survey:**
Shaping the new world of work
 - What measures have companies already taken to actively shape the new hybrid world of work?
 - How well are companies positioned to retain and attract talent?

Talent Climate Index (TCI)

The questionnaire is very brief on purpose – it can be fully completed within a few minutes under: talentklimaindex.de

TALENT-KLIMA-INDEX

25%

Internes Talent Management

Die Verfügbarkeit von Talenten für zentrale Fach- und Führungspositionen auf unserem internen Arbeitsmarkt beurteile ich als:

a. momentan



b. zukünftig



Die Fähigkeit unseres Unternehmens (aufgrund von Instrumenten, Prozessen, Management-Verhalten etc.) zur Identifikation und Entwicklung interner Talente beurteile ich momentan als:



Mein Kommentar zu internen Talenten:

Empty text input field for comments.

TALENT-KLIMA-INDEX

75%

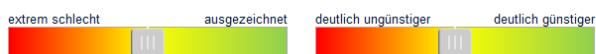
Commitment

Das Commitment zum Talent-Management (= die Bereitschaft, erkennbar für das externe und interne Talent Management Ressourcen im Sinne von Zeit und Geld zu investieren) beurteile ich von Seiten der...

Momentan:

Zukünftig:

Geschäftsführung / Vorstand



Führungskräfte allgemein



Personalabteilung



Mein Kommentar zu unserem Commitment zum Talent-Management:

Empty text input field for comments.

Talent Climate Index (TCI)

Focal topic of the current survey: Shaping the new world of work

Initial question: The COVID-19 pandemic has changed our working lives and will continue to shape the hybrid world of work in the future. What measures has your company already taken to actively shape the new hybrid world of work?

Further questions on the shaping of the new world of work:

- Regulations for **mobile working or working from home** with validity beyond the period of the pandemic
- Identity-creating measures to **strengthen the team spirit/cohesion in the organization**
- Measures to **ensure the flow of information** at interfaces
- **Health-promoting measures** or measures to promote a positive **work-life balance**
- Measures to ensure **performance and productivity**
- Measures to provide **feedback** to employees
- Measures promoting appropriate **leadership** in the changing environment
- Measures to continue to support targeted **learning "on the job"**
- Measures to leverage **cost-saving potential** through new forms of work
- Targeted "purpose" measures to **increase the sense of purpose**
- "Retention" measures for **employee retention**
- What **other measures** to shape the new hybrid work environment are currently being considered or have already been implemented in your organization?
- All in all, how successfully has your organization positioned itself **with a view to the future world of work in order to...**
 - retain existing talent in the organization? (not very attractive – very attractive)
 - attract new talent from the external labor market? (not very attractive – very attractive)

Talent Climate Index (TCI)

Calculation of the talent climate on the basis of balances

The basis for the balance computation is the coding of the answers:

0 – 49% = poor/less favorable

50% = no consideration in the formula

51 – 100% = good/more favorable

"Situation" balance = good – poor

"Expectations" balance = more favorable – less favorable

Talent climate =
$$\sqrt{(situation + 200) \times (expectations + 200)} - 200$$

Value range:

Values stated on a scale of -100 to +100

Example: -100 means that all those surveyed assess the situation to be poor/expect it to get worse

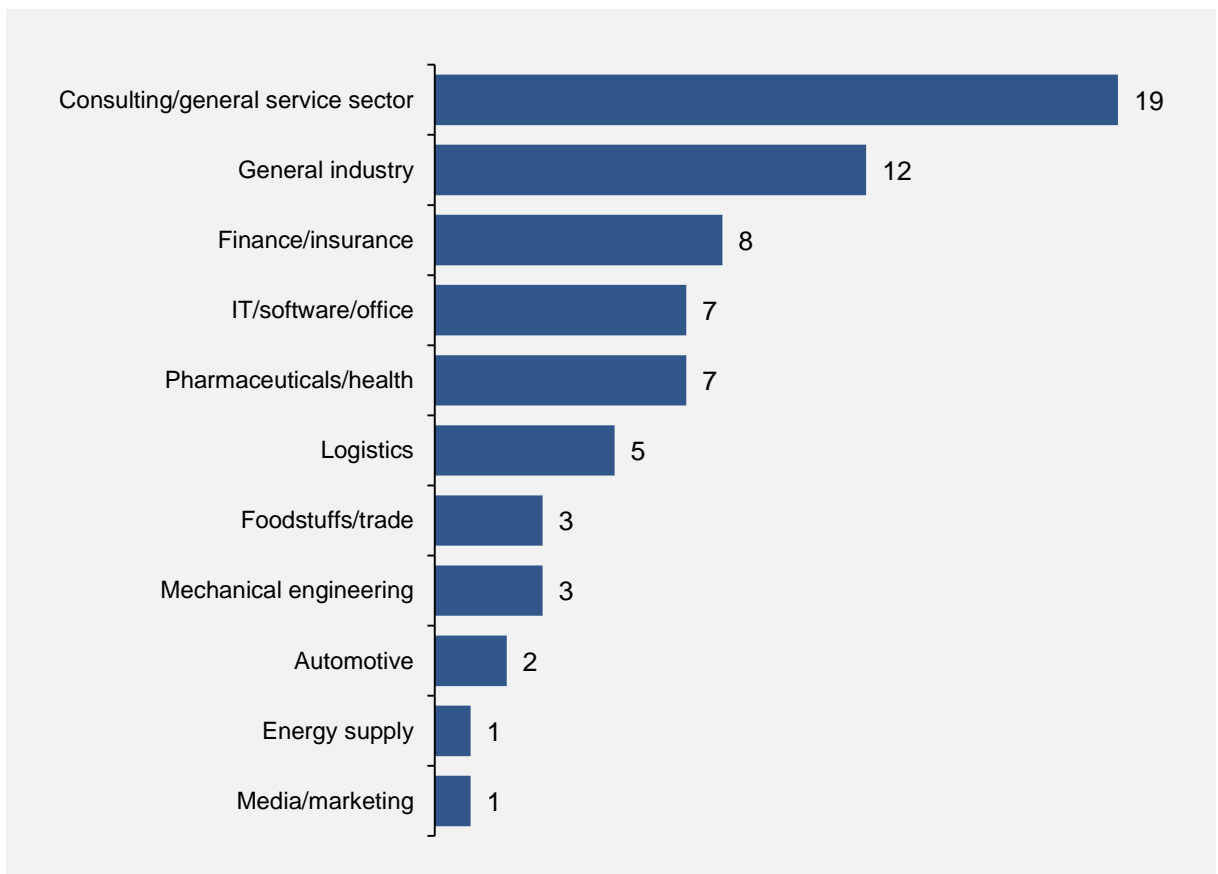
Survey – Second half of 2021

Sector distribution

Via the website www.profil-m.de/publikationen/talent-klima-index, newsletters, and the direct approach method, persons from different sectors were contacted, which resulted in 115 data sets that could be evaluated. They are spread across the following sectors:

Sector

(frequency in percent, excludes "Other," information was provided voluntarily)



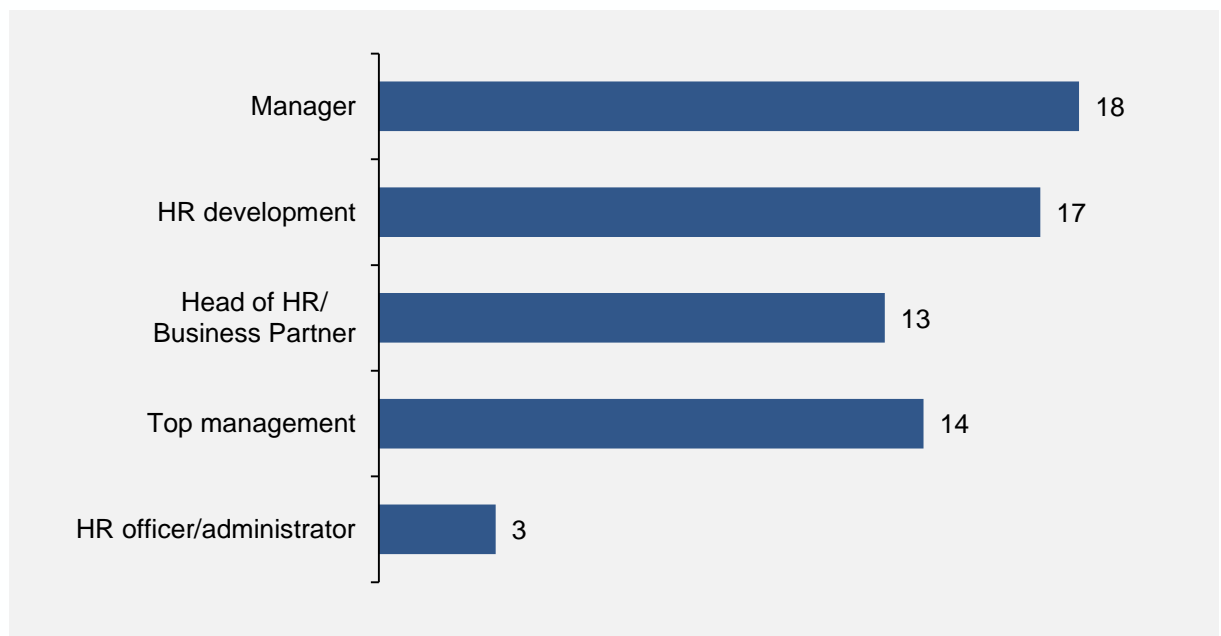
Survey – Second half of 2021

Participants in the survey according to function

Again, the largest single group of participants in this six-month period is that of managers. However, when combined, most respondents in this data set again come from the various HR functions. At 14 percent, the proportion of members from top management is slightly higher than in the previous survey.

Current position

(frequency in percent, excludes "Other," information was provided voluntarily)



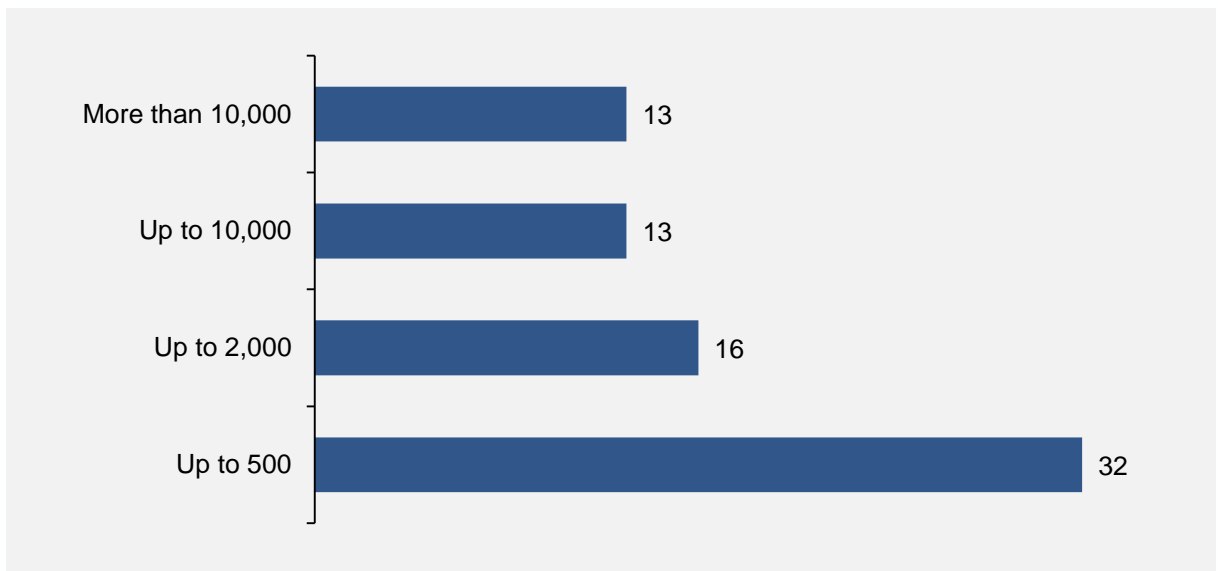
Survey – Second half of 2021

Number of employees in the companies surveyed

Similar to previous surveys, most respondents come from smaller companies, with the remaining company sizes roughly evenly distributed.

Number of employees

(frequency in percent, excludes no replies, information was provided voluntarily)





TALENT KLIMA INDEX

Talent Climate Index

Results – Second half of 2021
Detailed evaluation



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