

Unleashing potential in 2025 and beyond

Emerging trends transforming
organisational strategies

Our team offers their perspective on the trends impacting organisations around the world – from skills shortages and emissions regulations to productivity and growing partnerships across industries – and how organisations can respond to drive lasting impact.



Technological innovation, sustainability mandates, and shifting market dynamics are transforming how organisations operate and compete in 2025. The integration of cutting-edge technologies—AI, automation, prescriptive analytics—into operations is no longer a nice to have, it is critical for staying competitive and overcoming productivity challenges. At the same time, the growing emphasis on sustainability is reshaping corporate priorities and capital projects, as companies balance cost, climate and social responsibility.



Energy security or transition

Companies and utilities are in a complex transition, balancing cost and decarbonisation goals. Utilities face multiple challenges as they need to meet demand with safe, reliable, affordable and clean power as energy needs rise.^{1,2} Denver-based Partner, Sarah Heitzman notes utilities asking:

“How can we maintain reasonable rates while modernising and decarbonising the grid?”

South African Partner, Rhian Capostagno observes, “the energy transition is moving, but not quickly enough.” High interest rates and inflationary pressures are impacting profitability across industries like mining^{3,4} even as global renewables investment surpasses US\$3tn.⁵ While investment pours into private renewables, Capostagno reports storage remains a key issue. Even in North America, battery storage is the biggest obstacle at the utility scale. Heitzman predicts “investment will rise because the need for firm, dispatchable, clean power is so large.”

In South Africa, energy security often takes precedence over transition, with many concerned about commodity

prices, energy costs and import taxes in larger markets like Europe.⁶ These challenges will continue to grow as energy scarcity impacts smaller firms and suppliers more, while larger companies invest in renewables and behind-the-meter solutions.

Energy transformations take time but provide opportunities for new players. Heitzman foresees disruptors meeting demand for clean products like green steel, aluminium and hydrogen. “If they scale, prove their supply chains and deliver a product, they’ll accelerate this shift.” Sarah concludes this is already starting – “it’s not an if, but a when these new products become the norm.”

1. S&P Global, Data Centers: More gas needed to feed US growth, 2024

2. Forbes, Data Centers at heart of AI and digital surge, 2024

3. Financial Post, Gold Miners grappling with labour, inflation costs, 2024

4. FastMarkets, Base metals miners continue to fight against inflationary pressures, 2024

5. International Energy Agency, World Investments 2024 Overview, 2024

6. European Commission, Carbon Border Adjustment Mechanism, 2023

Technology, AI and growing regulatory impacts

With growing ESG requirements⁷, boardroom discussions around sustainability and circular economies are becoming more prevalent. Mohamed Abdulahi, a Director working across Australasia and Oceania, points to how

“there isn’t a mining or industrial project that doesn’t have environmental approval as part of the critical path.”

Resource reuse and minimising waste are top concerns as emission optimisation, tracking and electrification rise on the priorities list.

Balancing cost and climate with operational efficiency is quickly becoming one of the biggest challenges across Europe. Katya Vladislavleva, a Director working across Europe, adds, “resource industries are focusing on how to do more with less” through material recycling and creating more sustainable business practices. She points to poorer ore feeds in mining⁸ leading to

“[there is] a renaissance of projects trying to reinvent mining and metal processing to be low emissions and low energy.”

Vladislavleva sees investment in R&D as a strategic pillar in building resilience and overcoming this hurdle, warning, “you have to take a holistic approach to thrive in the coming years.”

In North America, energy transition technologies are in a holding pattern. Heitzman shares that “the regulatory lens is on everyone’s mind. With a change in the U.S. administration there is a high degree of uncertainty associated with the IRA and IJJ incentives and other relevant policies.” Beyond the energy transition, economic policies are also expected to change as the incoming administration signals new potential tariffs [citation below]. While it is not clear what the full impact on costs will be, organisations are urged to prepare for a change in trading patterns.⁹

7. Partners in Performance, Proactive climate disclosure is imperative, 2024

8. International Energy Agency, Outlook for key mining minerals, 2024

9. Reuters, Trump vows new Canada, Mexico, China tariffs, 2024

Managing low productivity, high costs and skills shortages

Ongoing skill shortages and low productivity are expected to persist into 2025. Abdulahi describes these as “sticky challenges that need time to be overcome” in Australasian capital projects. Companies are tackling underlying issues but face shortages in construction and engineering due to aging workforces and a lack of new entrants, “which is increasing timelines and causing hours per deliverable to rise.”

The answer for oil and gas is accelerating automation. Alan Trench, a Texas-based Director working across Latin America, sees “a wave of investment in making remote ops centres the norm.” He notes infrastructure and processes are challenges; “you have to bring people on the journey, so they draw benefits from technology—

“success requires a solid management system, training, and consistent coaching, something we actively help companies achieve”.

Workforce transformations are also critical to help people adapt to a digitised world. Vladislavleva points to leveraging AI to “skill people up, centralise experiences and prepare people for the future.”

In South Africa, Capostagno reports mining talent being poached by promotions and higher wages which increases safety risks. She worries this will lead to more safety incidents and impact production. “When supervisors job-hop, they risk not maintaining safety training or staying long enough to become an ‘old hand’ who can manage a crisis.”

Talent flight is also a concern for capital, energy and mining in Latin America, where skilled project managers and engineers are drawn abroad. Trench notes, “the Middle East is seen as more attractive – they are more accommodating culturally than ever before, have higher wages and interesting, long-term projects” that will tie up talent for years.^{10, 11}

Addressing this requires strong investment in recruitment and retention while tackling underlying issues for talent flight. Benefits need to be created for loyal, long-term workers; organisations must broaden pools, keep training up to date to address safety and productivity, and coach workers to ensure technology or automation has a lasting impact.

10. IFP Info, Middle East Construction Boom Led by \$3.9 Trillion Pipeline, 2024

11. Consultancy-me.com, Saudi Arabia's construction spending to hit \$150 billion in 2025, 2024

Rising partnerships across the value chain

With years of high inflation and costs, Abdulahi sees strategic partnerships rising in Australasia to keep projects on schedule, with project owners asking: “How do we think about projects as a program? How do we work together to drive them forward?”

He sees setting the right incentive structures, investing in new technology, and raising funds with supply partners as the smart path forward. “Doing so over several projects brings supply partners on the journey and convinces them to invest.” He further points to modular projects like China’s small modular reactors¹² and modular home construction in Sweden¹³ already delivering efficiencies by reducing timelines, budgets, material costs, and on-site labour.

Rhian Capostagno reports growing collaboration in Africa as “no one has all the skills to solve this, and it’s not smart to go at it alone.” State-owned agencies like Eskom and

Transnet are more open to collaborating with the private sector than ever before to secure energy (e.g., establish viable LNG import market)¹⁴ and re-establish the capability of the logistics network (e.g., improve rail and port infrastructure)¹⁵ to create a better business environment in the country.

Sarah Heitzman observes similar developments in North America with new ecosystems forming in mining to address challenges and meet demand for critical minerals. “People realise you can’t solve everything on your own” which is leading to new partnerships across the value chain^{16, 17} while public-private partnerships for financing¹⁸ and production¹⁹ come to life. Vladislavleva adds, “joint ventures are on the rise; small companies innovate and take on the risk of R&D and partner with—or are bought by—larger firms to implement solutions.” These partnerships and ecosystems are only expected to grow in the coming year.

12. Reuters, China starts up world’s first 4th gen nuclear reactor, 2023

13. Construction Digital, Key to modular construction success, 2024

14. Reuters, South Africa’s Eskom, Sasol agree to explore LNG options, 2024

15. MiningWeekly, Public-Private partnership providing powerful performance potential, 2024

16. Construction Equipment, Caterpillar, Trimble Expand Agreement, 2024

17. Mining Weekly, Rio Tinto and Aldebaran partner for copper project, 2024

18. US Department of State, Joint Statement on Establishment of the Minerals Security Partnership Finance Network, 2024

19. Mining.com, Chile opens 26 lithium salt flats to private companies, 2024

Conclusion

As companies prepare for 2025, adapting to productivity challenges, skills shortages, and regulatory demands is essential to navigating a year of stable but underwhelming economic growth.²⁰ The energy transition provides fertile ground to reshape how organisations function while embracing new technologies and strategic partnerships.

The key questions leaders need to address in the new year are: Does your team have the ability and tools to adapt to rapidly evolving demands? Does your organisation understand what is needed to create a broader ecosystem necessary to thrive?



Authors



Mohamed Abdulahi,
Director

Mohamed has consulted for blue chip companies around the world for 20 years. His experience encompasses transformation, business improvement, productivity improvements, and contractor management across a range of industries, including mining, manufacturing, utility infrastructure, health, media and logistics.



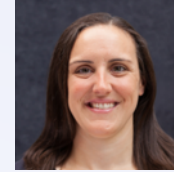
Rhian Capostagno,
Partner

Rhian has more than 25 years of experience in operational improvement and line management around the world. She has helped clients across metals and mining, capital projects, manufacturing, energy in continuous improvement, organisation, strategy development, and capability building. She is passionate about pushing the envelope to achieve the best possible result.



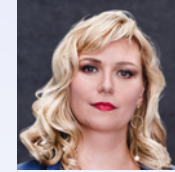
Alan Trench,
Director

Alan has nearly 30 years of experience in the Oil and Gas industry, working in strategy development and execution, organisation, and operational improvement, and Capex management. He has supported clients in all major international markets in their journey to achieve superior performance.



Sarah Heitzman,
Partner

Sarah has nearly 20 years of experience as a senior executive and consultant, having partnered with a wide range of businesses across industries like utilities, metals and mining, and energy to address their most pressing strategic and operational opportunities as they navigate the energy transition.



Katya Vladislavleva,
Director

Katya has over 20 years of experience working with clients to improve assets and optimise performance through prescriptive analytics, AI and data analysis. She holds a PhD in predictive modelling, a PDEng in industrial mathematics, is a member of Forbes Technology Council, advisor to the European Commission on innovation and material science, advisor to the Belgian government on AI.

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