The Evolving Workforce

Report #2: The Workforce Perspective
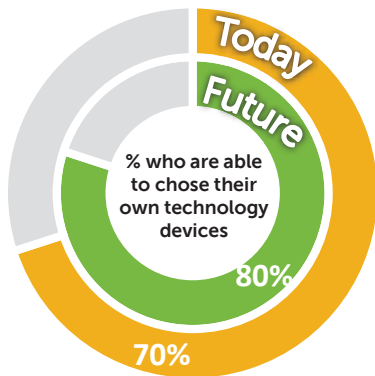
India

India Insights

Executive Summary

Indian workers give a lot to their companies. They are hard working – while 60% of them say they have too much work to complete in one day, only 48% of Indians actually want to be able to get all of their work done in a traditional 9-5 schedule. They empathize with the values of their employers - 85% feel in tune with their company's values. And they take a commendably responsible approach to data security – 60% realize that using personal devices for work makes it difficult to protect an organization's data and intellectual property.

Yet, as the country develops, and a more confident middle class establishes itself, so these workers are starting to demand a lot in return. They want freedom - 71% of employees want to be trusted to use company resources responsibly, and Indian employers should be concerned that around half their workers suspect them of monitoring their emails and of tracking how they use their time during the day. They want technology - 80% feel technology is an important element in being effective at work, 85% of the Indian workforce is attracted to work for an organization that offers good technology, and 78% feel they could be more productive if they had better IT resources.

So, while it's clear that Indian employers have much to feel optimistic and confident about, they also have work to do, partly in making their workplaces freer, but also in providing the technology that will release the potential of the Indian worker.

70% of Indian workers are able to choose their own work technology devices and **80%** expect this to be the reality in 10 years

Today
Future

% who are able to chose their own technology devices

80%

70%

65% of employees have the flexibility to choose the hours they wish to work
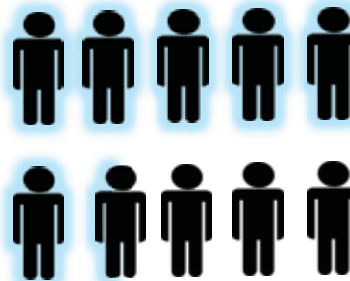
Flexibility is higher among private sector workers than public

60% of Indian workers believe they have too much work to complete

Magnitude of threats perceived by Indian workers

Work life encroaches on private life

There is too much work to complete

Under pressure to work longer hours

Difficult switching off after work

Trend #1: **Crowdsourcing and Crowdsource service**

Hypothesis

The workforce of the future, for many industries, could be thousands of people working in different places. Is cloud computing and other ICT applications going to make it easier to distribute more tasks and services and to invite input from a community through crowdsourcing?

Top insights

The Indian workforce is very clear about the important role that the Internet and technology plays in working life. 89% said that 'internet and other technological advances allow [them] to get things done more productively.' 87% then also go on to say that it 'provides individual employees the opportunity to make a bigger contribution to their organization.'

In the same way, these developments also facilitate knowledge sharing - 88% agree that the 'Internet and other technological developments allow [them] to reach out to others much more easily to solve a problem.' This is particularly the case among older workers - 93% of 45–64 year olds agree, while only 84% of 18–24 year olds do, perhaps reflecting the fact that they have never known a workplace without the Internet.

A similar number appreciate the role that technology plays in innovation - 87% agree it is 'creating opportunities for organizations to do business in different ways.' This score was consistent across all sectors.

As a whole, Indians appear to appreciate the contribution that technology is making to their work and to their lives more generally - 85% agree that 'technological innovation allows you to focus your work towards the things that you prefer to do.'

Yet, Indian workers do have concerns about technology. Ironically for a country which has benefited so much from outsourcing, four in ten Indians see outsourcing as a threat to their own roles, and the number rises even higher among the younger generation. This may reflect the fact that many Indian companies are moving up the value chain and much low-cost work is now outsourced elsewhere in the world.

Implications

With a tremendous appetite and optimism toward the transformative role of technology in the workplace, the conditions are highly favorable for both crowdsourcing and crowdsource service to take hold in India. Indian employers and IT departments are encouraged to nurture and encourage positive sentiments and empower

Trend #2: **Productivity measured in outputs, not hours**

Hypothesis

Standardized measures of productivity based on numbers of hours inputted would become less relevant in a knowledge-based economy. What are going to be the newer, softer metrics to assess productivity?

Top insights

The Indian respondents appear to be under more pressure at work than those in many other countries. 60% of employees feel that they have too much work to complete in one day, something which is particularly true in private sector healthcare (72%) and most prevalent among Power Users* (63%).

Yet this appears to bother few of them - only 48% of Indians want to be able to get all of their work done in a traditional 9-5 schedule.

Perhaps this optimism can be ascribed to the growing prevalence of flexible working. 67% of the Indian workforce wants to work flexible hours as they believe it makes them more productive. Those in large enterprises are especially keen (74%). Encouragingly, 82% of Indian workers report that they already enjoy flexible working hours, and 83% still expect to do so in a decade.

70% of workers want to be measured by outputs rather than hours worked and this is already the case for 81% of them. This is consistent across public and private sectors as well as between SMBs and large organizations. It is only the youngest workers, those aged 18-34, who still tend to be measured by inputs - six out ten said their employers look at hours worked rather than quality of work. The tendency is most prevalent within retail (63%) and telecommunications (70%).

Finally, 46% of Indians want to work remotely, an impressive 59% already can and 66% expect to be able to do so in the future.

Implications

The outputs-based model is already established in India, and Indian workers appear to have a high capacity to absorb pressure. Employers might wish to consider whether in the long term this is a good idea. They could think about how flexible working and remote working – both of which are already popular among Indian workers – to help to reduce strain and improve productivity. There is a clear role for IT industry to help facilitate this.

Trend #3: **Changes in the adoption of devices**

Hypothesis	The number and types of devices are proliferating and changing. Choice of device would become more about the situation, location and occasion. Are employers and the current systems and processes going to allow for increased end-user utility and choice?
Top insights	Indian workers by and large believe they have control over the technology they use in the workplace. 70% of them report that they are already able to choose their own technology and devices for work. 80% expect this to be the case in the future. This picture is consistent across sectors, company size and industry.

The workforce are somewhat split on the issue of interoperability versus device centricity. 59% want devices that share data and 57% believe it is important to have different technological devices available for work purposes, but 50% still want 'a single device to meet all work needs.' This perhaps reflects a realization that the number of devices is both converging and proliferating at the same time.

Three in four Indian workers use devices for both personal and work purposes, and an encouragingly high proportion (60%) realize that using personal devices for work makes it difficult to protect an organization's data and intellectual property.

Indian employees want control over their devices, and their employers have so far succeeded in meeting this need. They must continue to do so, remaining on top of the debate over interoperability versus device centricity.

Implications	Whichever way the market and demand goes, Indian employers need to anticipate it and deliver the most suitable technology to their staff. They should be encouraged by the remarkably responsible attitude employees take to data security threats, and so should use that high awareness to put in place policies and procedures that will protect company data and intellectual property in the years to come.

Trend #4: **Intergenerational kiss and punch**

Hypothesis	There will be more intergenerational knowledge transfer between younger 'digital natives' and the older generation. However, is there an increased risk of conflict and tension between workers of different ages, backgrounds, knowledge and skills?
Top insights	When it comes to matters of technology, there is a high degree of consensus among the generations in India. While 81% of those aged 55-64 believe it is important to keep up with the latest technology to be effective at work, 80% of those aged 18-24 also agree.

The generations also agree that employers should listen to their needs when making IT decisions (59% of 18-34s and 57% of 45-64s agree). 57% of those aged 18-34 want to be able to choose the type of technology they get to use in the workplace, as do 59% of those aged 56-64. 66% of those aged 55-64 think it is important that their employers use the latest technology, and 68% of those aged 18-24 think the same.

The only minor difference is that older Indian workers tend to have a greater appreciation of the benefits technology brings to the workplace. Of those aged 55-64, 94% feel they can now reach out to others more easily to solve a problem – this is slightly higher than the 84% of 18-24 year-olds who say this. While 85% of those aged 18-24 feel they now do business in different ways, an overwhelming 94% of the older age group say this, and 97% of them add that these new methods are more productive.

Implications	In many countries there is a schism between older and younger workers, but in India there is far greater inter-generational harmony. Employers might like to consider why this is. Is it because older workers have an unusually forward-thinking attitude towards technology? Is it because younger workers are more fulfilled and recognized than they are elsewhere? Or is it because those younger workers tend to unquestioningly adopt the attitudes of their seniors?

Trend #5: **Values versus rules**

Hypothesis
It would become easier to tell what employees are doing, but harder to tell them what to do. In this scenario, would employers use pervasive technology to oversee their workforces at any given time? And if so, would distrust accelerate?

Top insights
Trust is an important factor in the Indian workplace - 71% of employees want to be trusted to use company resources responsibly. It is encouraging that 89% of employees feel they already have this trust and is expected to be equally important in coming years. It is worth noting that of those who are extremely happy in their jobs today, 92% feel trusted to use company resources responsibly.

85% of our respondents told us they feel in tune with their company's values, and 85% said they expect that to remain the same in ten years. The workers who are most engaged with their company's values can be found in the private healthcare sector (94%), telecommunications (91%) and financial services (88%).

When it comes to flexible working, 60% want it, 65% have it, and 72% expect they will have it in a decade. It is slightly more common in the private sector (66%) than the public sector (59%) and, as we might expect, is considerably more common among Professional Nomads* (76%) than Task Workers* (63%) or Knowledge Workers* (54%).

Half of all Indians believe that they have their emails monitored by their employers and this is not expected to decrease in the future (49%). This is particularly prevalent in the financial sector (55%) and in retail (61%). In addition, 57% of employees believe their employer monitors how they spend their time during the day and 53% expect to still be monitored in ten years.

Implications
If Indian employers want their staff to feel happy in their jobs, then they need to trust them to use company resources responsibly. That will involve proper recruitment and careful management, as well as effective communication with employees. Fortunately, there appears to be little correlation between monitoring and levels of trust, with comparatively higher levels of monitoring not observed to lead to low trust. Indian employers would also be well advised to take note of the high expectations of their workers and to ensure that they continue to sit on the right side of the values versus rules equation.

Trend #6: **Many hats of the IT manager**

Hypothesis
As employee aspirations change to a greater onus on happiness, autonomy and choice, workplace IT would be one way of recruiting and retaining staff. Would the job of the IT manager increasingly resemble that of other functions, like the HR manager?

Top insights
85% of the Indian workforce is attracted to work for an organization that offers good technology. This is even higher among workers from organizations with more than 5,000 employees. However, some companies fall short of this goal - today, 74% feel their organizations use the latest technology. This number is lower in the manufacturing industry (65%).

The provision of good hardware and software is important to employees. Reassuringly, 80% of them believe this need is being met, and we see this consistently across sector and company size.

Regardless, 81% go on to say that they would enjoy work more if they had more of a choice in the technologies used. We see this to a larger degree within the engineering, architecture and government industries.

Encouragingly, eight in ten Indian workers believe that their employer provides good IT support. It would appear as though they need it - half add that IT problems are a frustration in their daily working life. This could potentially have a negative impact on productivity - 78% feel they could be more productive if they had better IT resources.

Implications
The highly aspirational value of technology in Indians' personal lives has comprehensively translated into the working environment, underscoring the connection between IT provision and employee morale.

Despite this, IT departments are getting decidedly mixed reviews. In a country where employee churn had reached chronic levels, companies that invest in their IT infrastructure and which are seen to be employee-friendly will enjoy a competitive advantage in terms of being perceived as an attractive place to work.

Trend #7: **Employee-led innovation**

Hypothesis

The business software of the future will be adopted and designed by employees rather than management or the IT department. Are we going to see more networked, de-centralized organizations to facilitate this shift in corporate hierarchy?

Top insights

Three in four Indian workers feel that 'their employer listens to their needs when making IT decisions.' This is even more evident in SMBs (76%) than in large enterprises (69%). Perhaps in SMBs, there are fewer policies and procedures to impede clear communication between employers and employees.

A healthy 84% of our respondents told us they can access sites on the Internet when working and 74% said they have the freedom to download software if they believe it will help them do their work. Again, this sort of freedom is more widespread among smaller organizations.

Three in four feel that their 'employers give them freedom to choose how to work.' This is similar to what we found in other countries. In India, it is particularly evident in the private healthcare sector (94%).

Implications

Freedom of technology matters to the Indian worker and on the whole Indian employers are able to provide this. Whether employee-led innovation is able to develop in India is likely not entirely a matter of technology, but of broader management and cultural considerations. SMBs and certain verticals such as private healthcare are leading the way and setting an example for others to follow.