

VOICES FROM THE GROUND

The UNHEARD impact of
Covid-19 on India's
workforce





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EXECUTIVE SUMMARY

Enough has been written about the disruptions brought about by the global pandemic and how it has impacted lives and livelihoods around the world.

Our report titled "Voices from the ground" brings to you 'real perspectives' of the Indian workforce – not expert opinions. We believe that the world we look forward to, starting from 2021 is going to be very different from the one we imagined, specially, in the areas of our focus in India – Future Technologies, Work and Mobility. If there is one take away from the year 2020, it is about building agility and resilience - as individuals, organisations and societies.

Work will undergo a transformation in the way it was imagined. Hub and spoke offices will evolve, flexible ways of working and associated search for talent fulfillment will be the new norm and non-monetary rewards will be appreciated. Mental health dialogues will gain prominence – both on and off workplaces and building resilience will be the prime focus for India Inc. Mobility is set to become more personal, based on trust, control and convenience. This presents opportunities to EV and associated industries. Future Technologies emerged as a saviour during this pandemic. Tech will reimagine leasing, augmented spaces, rewards, learning and networking.

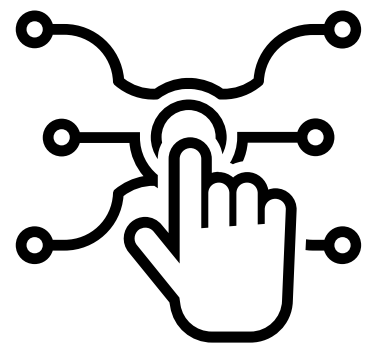
We hope "Voices from the ground" brings you as much insights as we gained while curating it, and that it helps fuel your ambitions – for the post-pandemic world.

What we have presented in the report is only a highlight. For detailed insights on the findings, please write to sectors@theiet.in.

INDUSTRY RECOMMENDATIONS

TECH

During this time of uncertainty and fear, the digital divide existing in the country has become more pronounced. However, the willingness to adopt technology has been our lifeline. The use of technology in healthcare, contact tracing, Covid-19 testing, continuing work are all testimonies to the fact that humans and technology are a great joint force!



Organisations should use technology as an augmentation strategy and design ways to integrate teams of humans and technology.

Delivering real life like networking scenarios should be a consideration for networking platforms.

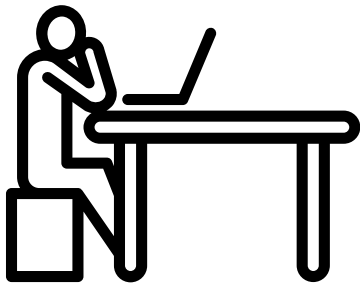
Skilling platforms should consider providing placement assistance or interviews (employer linked skilling).

"The pandemic has acted as a reset. The world is changing and suddenly experts are confounded because their expertise is based on the experiences of the past. The past has not seen anything like the pandemic before. This report is a straight from the ground collation and inferences of those responses. I hope that this report will help experts make better and insightful decisions as we rebuild in the post-pandemic world."

Shekhar Sanyal,
Country Head and Director, IET India

INDUSTRY RECOMMENDATIONS

WORK



The impact of the Covid-19 on work has been one of the most visible ones. This is however an opportunity for businesses to challenge the status quo.



"The main challenge that I do face as an individual primarily is the right sort of balance between work at home and family time. I often end up working a minimum of 16 hours a day and I work in a global kind of environment which means there are calls right from early morning till pretty late at night and of course there is other work that needs to be done."

Navoneil Bhattacharyya

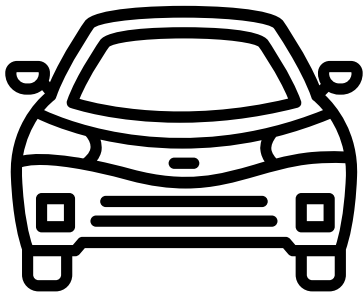
Organisations should be ready to adopt hub and spoke office models.

Organisations will need to evolve reward systems that address the fears of the new normal. Not all rewards will be financial going forward.

Mental health resilience dialogues must increase in workplaces.

INDUSTRY RECOMMENDATIONS

MOBILITY



The pandemic could have a lasting impact on mobility as we see it driving changes in consumer behavior. With a large proportion of respondents inclining to use private transport, we foresee a peak in demand for two and four-wheelers.



"The biggest challenge that will continue to persist post-Covid will be commuting to work. With transportation working at a reduced capacity, it will be interesting to see how employees travel to-and-fro for work. Additionally, adjusting back to what we used to call the 'OLD NORMAL' and a corporate routine will be challenging."

Vivek Vasan,
Software Engineer, Bosch



Relevant policies and incentives need to be reviewed such that Electric Vehicle (EV) adoption can be stimulated.

Leasing models should be considered by shared mobility players (with same vehicle and same driver if possible) to ensure they gain trust of repeat users.

Introducing leasing options and flexible financing instruments for purchase of 2 and 4 wheeler vehicles will enable accessible individual mobility.

RESEARCH METHODOLOGY

This research was designed and executed jointly by the IET and Feedback Advisory Services Pvt Ltd. The study was conducted in three stages. In the first stage, the IET and Feedback Advisory launched a listening series and invited participation from professionals across industries and career stages. Fifty professionals from varying industries with a range of experience, representing organisations of varying sizes spoke their mind in these qualitative research-driven discussions.

Distilled insights from these discussions were validated using a survey instrument. In stage two, we piloted the survey instrument with over thirty respondents. Tweaks were made to the instrument and the online survey link was sent out via email to respondents across industries and career stages, nationwide. We received 789 completed responses. The questionnaire was designed to understand the current challenges faced by professionals, coping mechanisms employed by them and future fears that the professionals harbour in their minds.

Data assumptions

The quantitative data from survey responses were analysed through the lens of the three sectoral pillars of IET - Tech, Work and Mobility. To ensure that the perceptions of impacted professionals are adequately highlighted and to understand the data trend better, neutral responses were removed from some of the base calculations. Since the impact of the lockdown was fairly ubiquitous, it was seemingly difficult to represent views of those absolutely unaffected by the pandemic in this study. Through these measures, we aim to bring better validity to our findings.

RESEARCH INTENT

"The study gave us insights into coping mechanisms that professionals were using at various stages of the pandemic and really helped document what was happening on the ground. This has profound impact on the future - of mobility and work. Future technologies and their integration into organisation's DNA will be the way forward. We are excited at the possibilities presented in this report and look forward to enabling them with the IET."

Devendranath AM, COO,
Feedback Advisory



The IET commissioned a study to understand the impact the Covid-19 outbreak and the effect subsequent lockdowns have caused on entry and mid-level professionals in small and large organisations.

The need for the study was felt because the current conversations about the impact of Covid-19 are top-driven.

The voices amplified by traditional media channels or on social media platforms are those of either top management or absolute bottom of pyramid labour. But there is a large chunk of mid-level employees whose voice has not been adequately represented in the larger scheme of discussions and decisions. Additionally, most of the dominant narrative was driven by expert opinion and advisory, rather than voices from the ground.

It is important that decisions taken by key stakeholders and policymakers should also consider the voice of this under-represented section.

The study has focused to impact on three key aspects of a professional's life - Tech, Work & Mobility.

SURVEY REACH



789

RESPONDENTS

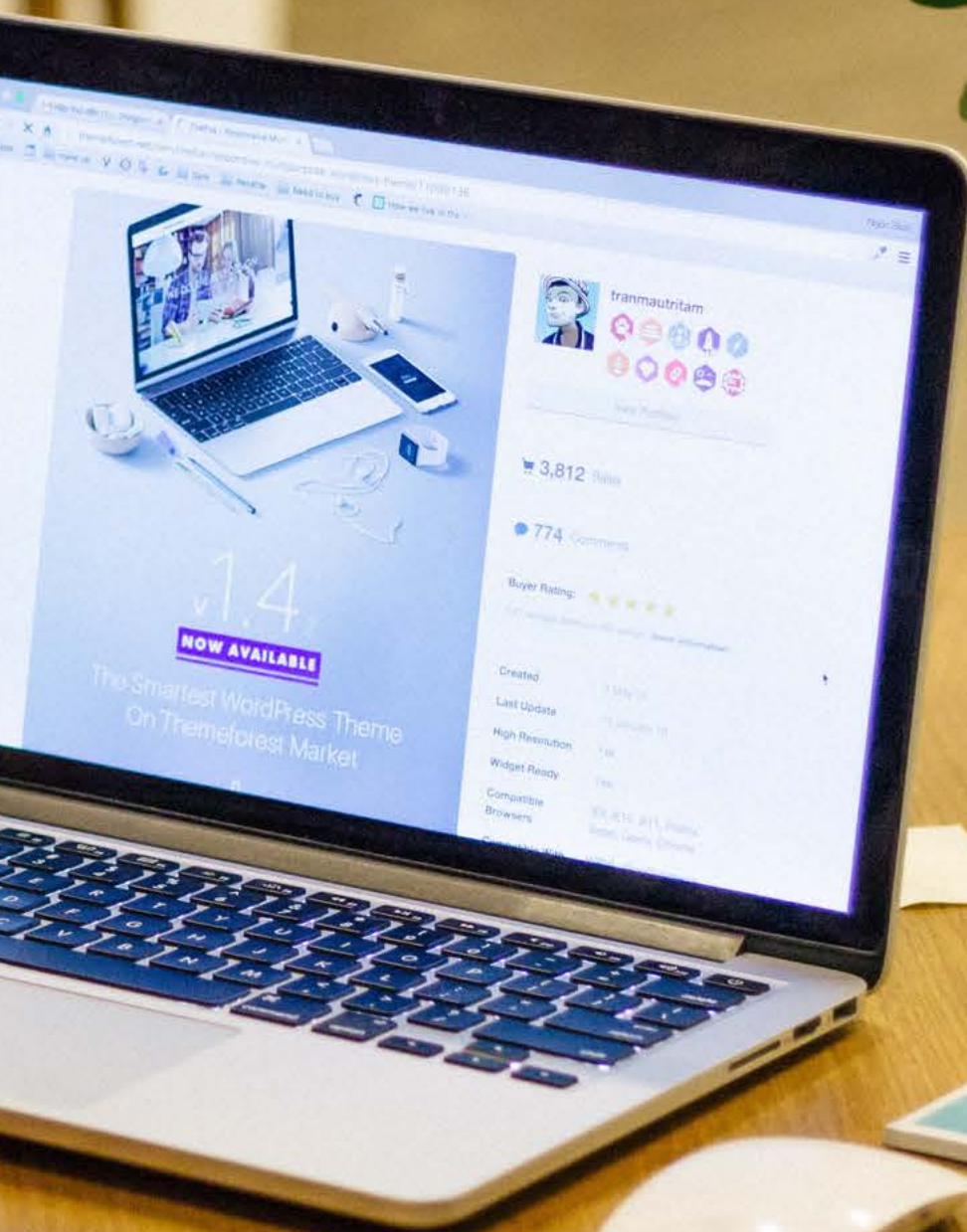
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NORTH

53
EAST

383
SOUTH

212
WEST






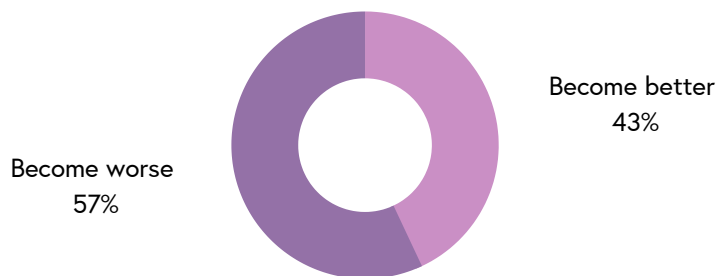
"In the initial days of the lockdown we were really trying hard to attain a balance – the days never seemed to end. Being a volunteer-led organisation, we were in the thick of things, bringing advisory notes for organisations and employees around safe work from home practices, providing direction to healthcare sector using our expert knowledge and working with the ecosystem to see how industry could suffer the least amount of blow. We reached out to as many of our customers and volunteers as possible to check on them – it was overwhelming to be present to the fact that the pandemic has had a lasting impact. By mid-June, we had evolved a very agile framework for working, a connected system for our teams to feed off each other's deliverables and ensure that we deliver maximum impact. The biggest lesson I have personally learnt is that even when our best laid plans fail, if the intent and the end goal are clear, collaboration and hardwork can still make a world of difference."

Anitha Kaveri
Head of Sectors and Special Projects, IET India

VOICES FROM THE GROUND

CURRENT CHALLENGES

- 
- Pandemic delivers a colossal shock to the job market
Professionals are immensely insecure about current jobs and the career progression for the next couple of years.
 - Tech adoption needs to increase
While technology has enabled fast and transition to the virtual workspace, improving productivity, native adoption needs to accelerate.
 - Limited options for shared mobility
Professionals feel a growing pressure to have their own modes of transportation.
 - Growing financial woes
Professionals deeply worried about salary cuts, inability to pay EMIs and meet growing expenses.

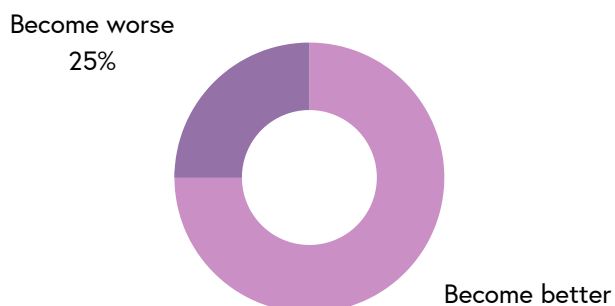


Tech

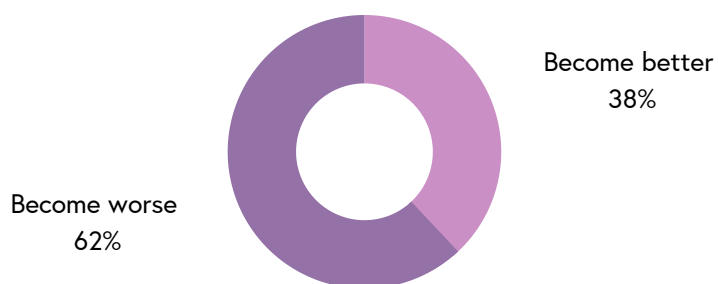
Work is plagued by significant negative sentiments arising from a weak job market and a corresponding drop in job security. The weakening financial stability of companies adds to the concerns of working professionals. Extended work hours have adversely impacted work-life balance. Productivity and work quality have improved in comparison to pre-COVID times.

Professionals have cited significant improvements in their ability to adapt and leverage new technologies for work. Investments in home infrastructure have contributed to this. Real-time connectedness has also improved the effectiveness of communication and employee engagement.

There has been a severe impact on mental and emotional wellbeing of working professionals. Over four times more professionals were worried about the impact of salary cuts and aim to curb discretionary and entertainment-related spending. Inability to manage grief emerging as a key factor impacting productivity at the workplace.




Work

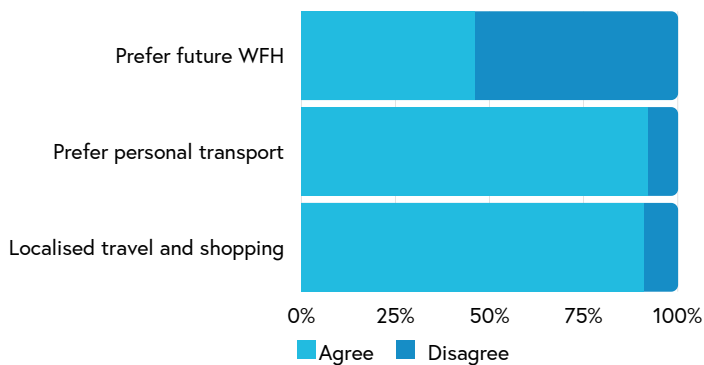
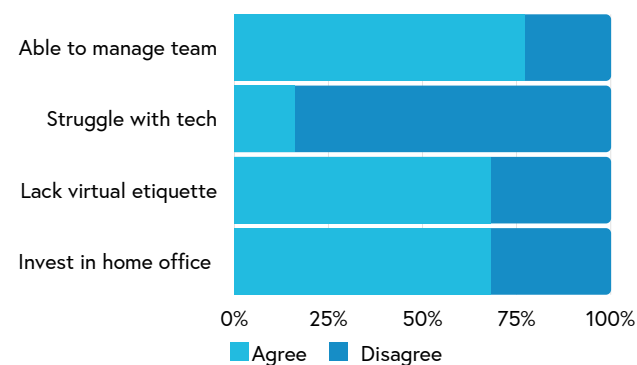
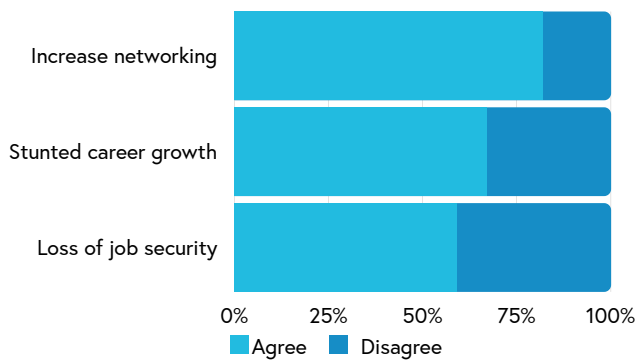


Mobility

VOICES FROM THE GROUND

COPING MECHANISMS

- 
- Professional networking saves the day
Networking and up-skilling seem to top the list, to beat growing concerns of job security.
 - Better team bonding
Efficient use of technology has led to productive teams and better camaraderie.
 - Vocal for local
Forced to use own transport, professionals choose to shop locally and within a radius of 5 km.
 - Discretionary spends drop significantly
Adversity funds being built by curbing and delaying discretionary spending, like family trips and personal indulgences.



Professionals are spending more time on professional networking now than before the pandemic. While most are confident that their organisation won't lay them off during the pandemic, the fear of stunted career growth and erosion of job security has heightened. Online learning, up-skilling and re-skilling are being considered seriously.

Tech adoption has ensured better team productivity and many felt they have been able to better bond with colleagues virtually. Virtual team management has also shown effective outcomes. However, effective use of technology is still a far cry. Organisational support is being expected with infrastructure and training, to make a virtual work environment both effective and efficient.

Working from home has reduced travel expenses. Shopping has become hyperlocal, both for convenience and cost considerations. Most professionals feel continuing to work from home might be very productive, given the time saved due to long hours of travel.

VOICES FROM THE GROUND

FUTURE FEARS

- The vicious cycle of fear about future income

Professionals harbour deep fears about impact of the pandemic on their future income and plan to spend less on discretionary expenses.

- Fear of losing connect

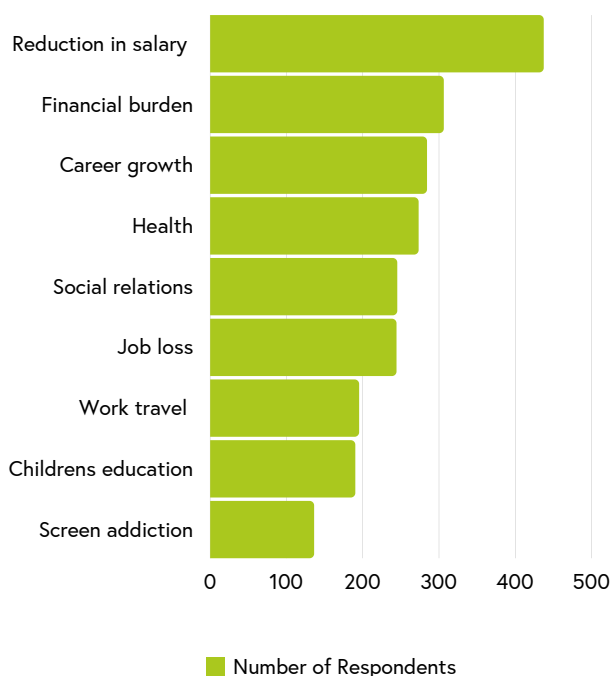
Professionals working entirely from home dread the impact of pandemic on social relationships they nurtured.

- Career anxiety sabotaging growth

Significant negative sentiments arising from perceptions about weak job market and job security plague an already overworked workforce.

- Difficulty of building models to integrate humans with those technologies

Reimagine how humans will work with tech to derive meaning, connection and wellbeing at work.



"I believe as humans we work on the basis of experience and when we interact with each other, we have a little bit of experience and opinions about each other. But now that we are working from home, it is incredibly difficult to convey everything we want to say in the right way. Working from home has other challenges as well like inefficiencies that arise due to technical challenges like power cuts or constant pressure resulting from organizational surveillance/policing to ensure people are working for 8-9 hours."

Swati Mudaliar, Electrical Engineer,
BuroHappold Engineering

The future fears clearly springboard from the challenges faced on lines of reduction of income and corresponding financial burden and point towards impact caused on personal life.

Much in the same way that we started the decade in uncertainty, we appear to be headed back into a period of uncertainty.

Covid-19 has reinforced our conviction that human concerns are not disparate from technological advances, but integral for organisations looking to capture full value of technologies they have put in place. As organisations evolved new ways of working in the face of the crisis, we see that technology was not one of their biggest challenges.

One of the biggest anticipated challenges we will be faced with is the difficulty of building models to integrate humans with those technologies: to create new habits and management practices for how people adapt, behave and work in partnership with the technology available to them; to fulfill distinctly human needs such as the desire for meaning, connection and well-being at work; to maximise worker potential through the cultivation of capabilities and to safeguard ethical values.



TECH

WO



RK

MOBILITY

PERSPECTIVES

TECH

Positively, the pandemic has caused an acceleration of remote working and rapid focus on evaluating and de-risking the end-to-end value chain. The potential carbon emission reductions could result in a renewed focus on sustainability practices.

Tech and Covid-19 have played a significant role in dissipating the gender divide, as professionals irrespective of gender have found ways to be effective and efficient.

KEY CONCERNS

Cloud revolution

As-a-service platforms will help companies adapt to market conditions with the ability to dial up or down their services through.

Pressure to invest in home office

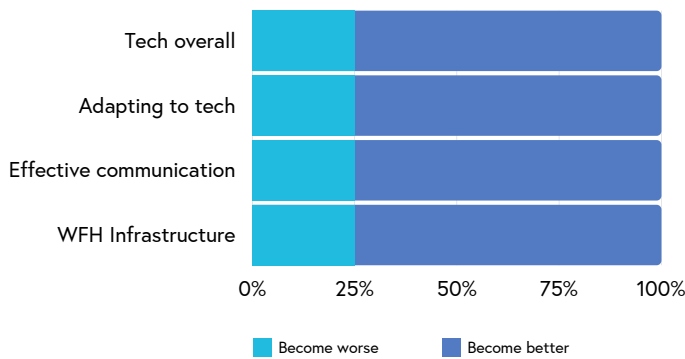
Significant number of mid-level and entry-level professionals have also felt the need to invest in home-office

Remaining human in a tech driven world

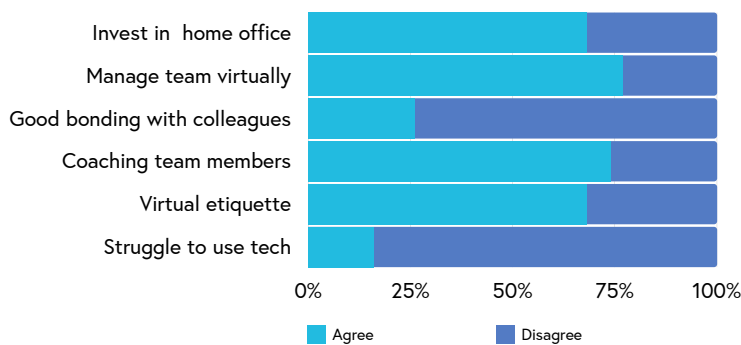
Need to overcome the instinct of treating humans and machines on parallel paths.

Working from home is challenging

Impact on creativity, loss of interaction and serendipitous conversations, and lack of support for younger staff, are all cited as good reasons to return to offices.



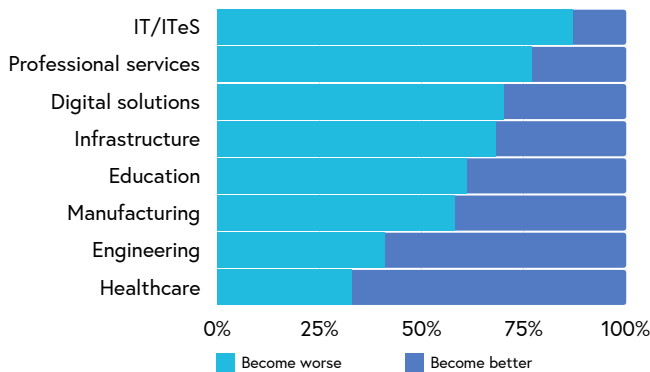
Across age groups, people have taken to technology like fish to water. Amongst those impacted, adaptation to technology has become significantly better. People have not only managed to start using new technologies but have also progressively become better at virtual communication and are actively investing in setting up home infra as they prepare for a long haul and brace to continue working from home for a much longer time than anticipated.



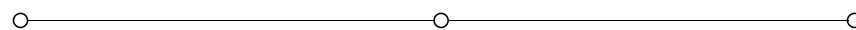
As expected, those in senior roles have naturally invested in home-office infrastructure, but a significant number of mid-level and entry-level professionals have also felt the need to invest in home-office infrastructure.

Surprisingly, professionals in sectors like construction, real estate and education have adapted their working style and harnessed technology successfully. Some sectors which require physical presence like hospitality are yet to figure out a way!

Sector analysis to understand sentiment around 'need to invest in home office'



TAKEAWAYS



Digital transformation to accelerate

Use of IT in non-tech areas will continue to grow.

Boost to online learning platforms

Upskilling platforms will retain the growth trends they are currently enjoying.

Networking set to get serious

Platforms that deliver real-life-like networking opportunities, digitally will see huge demand

PERSPECTIVES

WORK

Professionals are worried about an increase in economic inequality, social distancing and loneliness, stress and burnout.

KEY CONCERNS

Reimagine work processes

Build structural scaffolds to mitigate conflicts, align teams and ensure safe and thorough information processing.

Reimagine organisation structures

Formalise team processes, clarify team goals and build-in structural solutions to foster psychologically safe discussions.

Reimagine employee wellbeing

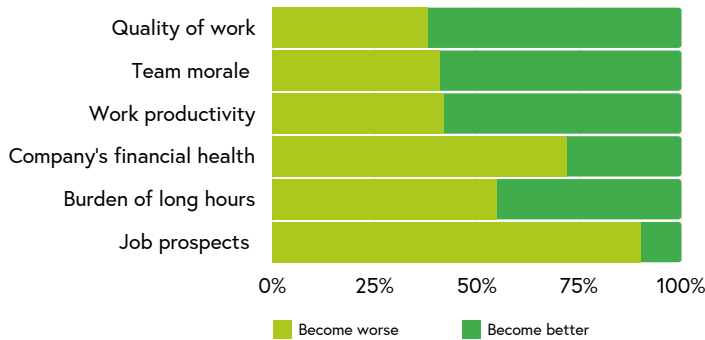
Provide opportunities for non-task interactions among employees to allow emotional connections and bonding to continue among team members.

Demand for compassionate leadership

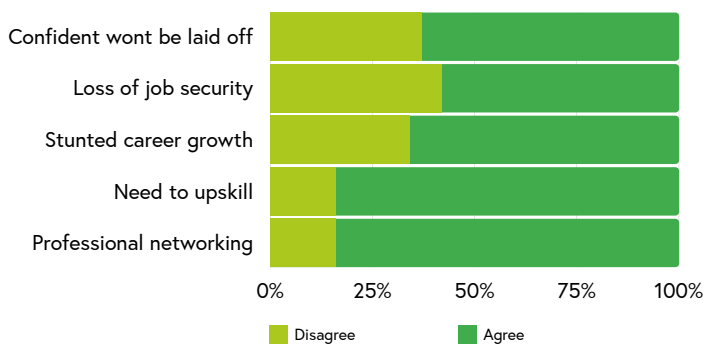
One expects higher sensitivity to risk, particularly about health issues and more attentive communication styles.

Roadmaps for new patterns of work

Time for organisations to focus on building positive, productive interactions that will aid in the ongoing transition to new patterns of work and start designing evidence-based roadmaps for moving forward.

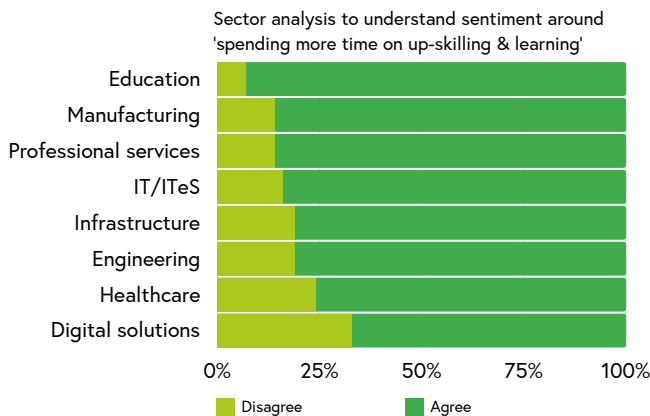


Work-from-home infrastructure will continue to see increased demand. Providing support for this infrastructure will become part of an organisation's responsibility. Organisations will have to rethink large B2B infrastructure deals to more efficient smaller ones - eg. single leased line for office to more corporate plans with different internet service providers, from one single office decor vendor - to providing WFH infrastructure to where their employees need it.



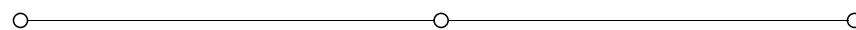
Fear and anxiety around their careers, salary cuts, job losses as well as general job market will have a lasting impact on the workforce's morale and performance. This will also lead to career indecisions. In short, the mental health of the Indian workforce will continue to be negatively impacted.

Increased need to "look" visible will lead to friction between teams which is led by the perception that those with high visibility projects enjoy a better sense of job security.



Reduced face time and interactions will make collaborations more difficult. In a scenario where organisational loyalty was already getting replaced by loyalty to managers/teams, reduced interactions will weaken whatever sense of loyalty was left.

TAKEAWAYS



Young professionals not in favour of work from home

They feel they are missing out on learning from peers, also forming bonds is tougher.

Family takes priority

Professionals between ages 30-50 years are upbeat about work from home, as it allows for better management of family requirements.

Mental health needs systemic intervention

Organisations will have to integrate wellbeing practices in a more holistic manner.

PERSPECTIVES

MOBILITY

The most obvious impact has been a shift from public transport towards private vehicles and hyperlocal mobility solutions. Professionals have come to look at convenience through the added lens of safety – favouring more private modes of transport.

KEY CONCERNS

Reimagine shared mobility

The current concept of shared mobility might see reduced uptake as trust is still low. Ride hailing, ride sharing will take a while before returning to older levels.

Traffic infrastructure under stress

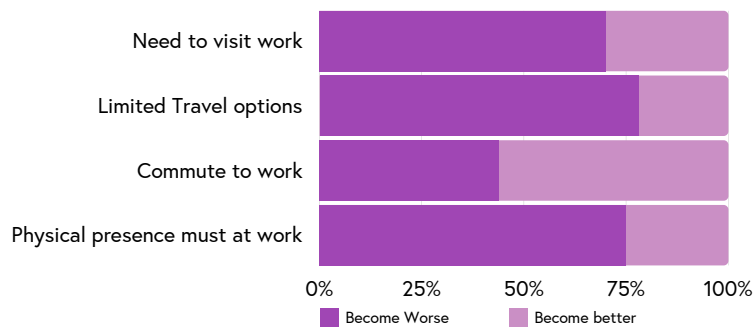
Traffic infrastructure will collapse even if a fraction of public transport users switch to personal vehicles, leading to adverse impact on the environment.

Impact on air quality

An increase in personal vehicles will contribute to worsening of pollution and air quality in urban cities.

Potential technology setbacks

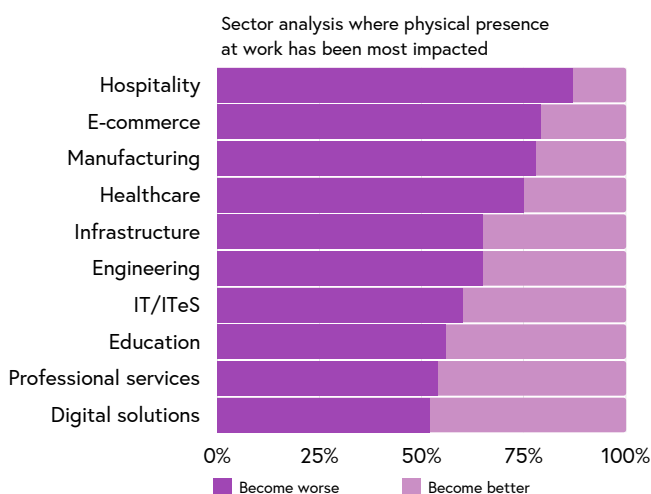
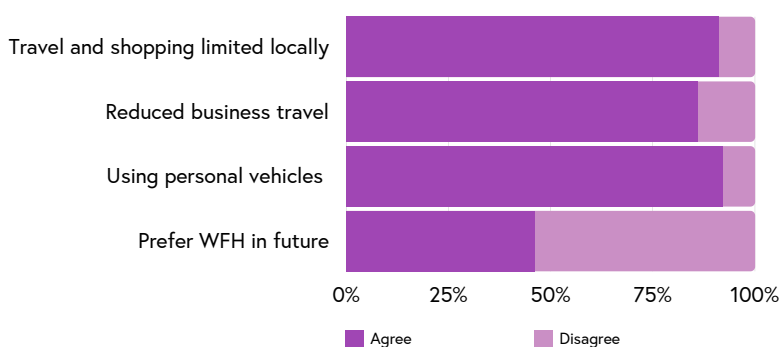
Delay expected in development of autonomous driving, as OEMs and investors scale back funding to concentrate on day-to-day cash-management.



Public-transit ridership has fallen 70 to 90 percent in major cities across the country. The operators are burdened with uncertainty and potential need to implement and control strict hygiene protocols —such as compulsory face masks and health checks for passengers or restricting the number of riders in trains and stations to comply with space requirements and COVID-19 protocols.

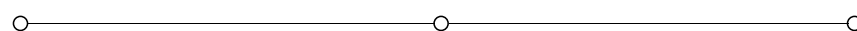
The impact due to limited shared travel options has negatively impacted most working professionals across the country. But more than half have managed to overcome the challenge and have figured a way around. This could probably be by using travel pools/commute share apps, owned vehicles, second-hand vehicles, etc.

Surprisingly, those in senior positions are more hassled with mobility issues than mid and entry-level professionals. Intuitively one would assume this group would be much more cushioned in terms of mobility.



Amongst professionals who have been impacted, a significant number have tried to balance the challenge of mobility by preferring to use their own vehicles for local travel and shopping.

TAKEAWAYS



Auto sector to boom

There will be an increase in the usage of personal vehicles and purchase of new vehicles.

EV to get a boost

With increasing number of consumers looking for fuel efficient 2 and 4 wheelers for daily commute, EV adoption is slated to rise with right incentives.

Personalised shared mobility options to rise

New models like leasing shared mobility solutions for a stipulated period of time such that the user has complete control over usage of the vehicle will be met with interest.

"I do some executive coaching, mentoring of CXOs and consulting engagements of which some got differed or some got cancelled. The pandemic has seriously impacted the cash flow and it will take some time to bounce back . Secondly, working from home 24x7 is not something that we are used to. So working from home might be good in the beginning but going forward it could a debatable subject and might only work for a certain set of individuals. I do not think COVID-19 will go away anytime soon. Lifestyle will change and we will live in fear for the next few months until the vaccine is available in India; the fear of not having adequate health facilities, fear of whether physical distancing will continue and be abided by all, the fear of being able to move freely around."

VSR, Chairman & Managing Director,
Chief Digital Consultant - BT&BT



SUMMARY HIGHLIGHTS

EV adoption and infrastructure development

Recent laws allowing the sale of EVs without batteries, and customers paying for batteries as fuel through battery swapping, form an inflection point in India's EV journey.

Augmented public transport

Augmented Reality is emerging as the perfect tool to simplify mega transport networks and systems and make them more understandable and personalised.

Workplace as an ecosystem

Workplaces need to be flexible. They need to enable changes as rapidly as people and organisations require. Individuals and teams will choose the right space based on the task required and where they feel the most productive.

Employee wellbeing

Workplace wellbeing of employees will have a direct impact on the bottom line of organisations. It will move from being a vanity function to a strategic function of the boardroom.

IN CONCLUSION

Our study hints that the post-pandemic world will be a matter-of-fact and utilitarian one powered by technology, where individuals will be in charge of their own skills, seeking newer and more meaningful ways to gain social capital, ready to do what it takes to surmount their fears spurred by the uncertain job market. We also imagine that organisations will pioneer new ways of working, attracting and retaining talent.

The common thread that runs through all of these scenarios is indeed technology – EV adoption, EV infrastructure, augmented public transports, on-demand offices, and talent, personalised learning and rewards are all part of what we imagine will take off on the other side of 2020. The possibilities are limitless and these avenues are what we want to focus on, as we stand on the precipice of a new world!

Where are we headed?

Voices from the ground indicate that we are headed to a world where technology will be integrated with our lives and living in such a manner that it will be difficult to tell them apart. Data privacy laws will have to evolve as boundaries of personal data blur. We would also like to caution readers against blind tech deployment without assessing the realities of the new world.

The skill of reimagining solutions for our challenges is the need of the hour. Learning and skilling especially transferable skills that can be applied in various contexts will be more valuable.

The age of neo-generalism we had predicted in 2019 in our Future of Work playbook is now closer than ever.

Connecting and collaborating have been affected more than ever during the pandemic and voices from the ground indicate that technology has not yet been able to bridge this gap. Tools that help individuals build and maintain meaningful, utilisable networks that can be leveraged to help them become more resilient are worth looking out for.

We are excited about the possibilities! See you on the other side of this great learning experience!



Feedback Advisory Services Pvt Ltd is a research-based advisory firm that specializes in providing market assessment, analysis and advisory services to global companies for Indian and International markets.

Feedback Advisory has a compelling value proposition to provide strategic advice and implementation assistance.

Our solutions are deeply rooted in understanding client requirements & expectations in order to provide tangible ideas and practical solutions. Helping solve business challenges by unearthing the most 'hard-to-get' market information and distilling insights. Our approach is grounds-up and our roots in market research provide a strong foundation for advisory.



The Institution of Engineering and Technology (The IET) is one of the world's largest professional societies for engineers, headquartered in the UK.

Soon to turn 150 years, the IET works closely with industry, academia and government in its mission to engineer a better world. In line with this, the IET also has specific global initiatives around key sectors that are relevant to solving problems that impact society at large.

In India, the IET has over 13,000 members and has wide-ranging activities in alignment with the overall global IET strategy that also includes sector focus in areas such as future technologies to future of mobility and transport as well as the future of work. With our members, we are driving innovation and change in the fields of engineering and technology. We research, investigate, review and analyse the industry's challenges, proposing solutions that will have a significant impact on the world for years to come.





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