DIGITAL WORK TRANSFORMATION:
Equipping the Hybrid Workforce Across the World

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In this InfoBrief

IDC analysts from three different geographies were asked to present their views on work transformation and technologies that define new ways of working in and beyond the COVID-19 era. Supporting their interviews are key statistics from IDC survey data and discussions with corporate leaders who are successfully navigating the shift to more hybrid ways of working.

What you will learn:

- **Key trends** that are defining the dynamic shifts between remote and on-premises work around the globe.
- **Core technologies** like infrastructure, software, and purpose-fit hardware—essential to supporting a hybrid workforce.
- **Recommendations** to consider within your own organization to achieve successful work transformation.

47% of organizations that had **longer-term digital transformation strategies and investments** before the pandemic are showing strong signs of business growth.

62% of organizations with a **longer-term commitment to digital transformation** are investing in peripherals such as **headsets and cameras** in 2020–2021 to enable technology parity for all members of their workforce.

Work Transformation and the Future Enterprise

Across the globe, employers have had to rapidly shift between on-premises and remote ways of working as a result of the COVID-19 pandemic.

- 84% plan to accelerate the digitalization of work processes (e.g., use of digital tools, video conferencing).
- 83% plan to provide more opportunities to work remotely than before the pandemic.

A Global Spectrum of Work Models and Services to Support Them

The balance of remote and on-premises work varies significantly by geography and by concerns for public health and safety. The recurring ebb and flow of workers moving between remote and on-premises locations is codifying new ways of working that require comparable employee experiences regardless of location.

Work transformation and investment in **technology parity** to support a global hybrid workforce is an essential element to enabling business resiliency through and beyond the current pandemic.

*IDC defines **technology parity** as the requirement that all workers have secure access to the resources required to do their jobs, no matter their preferred device or if they are local/remote/in the field.
The Growth of the Hybrid Work Model

An IDC poll from October 2020 makes clear the reality that organizations are gearing up technically to support a much more resilient and hybrid way of working. The poll found that business and technology leaders globally anticipate that their work models will be redesigned to support a hybrid workforce that shifts between working onsite and at home.

For 80% of business and IT leaders, device support (including mobile, tablet, desktop, etc.) is an important or very important factor when selecting a team collaboration tool.

Across the globe, 42% of organizations are focusing on connecting individuals seamlessly regardless of location, situation, or context.

<table>
<thead>
<tr>
<th>Region</th>
<th>Percentage Expecting to Adopt Hybrid Work Models</th>
</tr>
</thead>
<tbody>
<tr>
<td>North America</td>
<td>38%</td>
</tr>
<tr>
<td>Asia/Pacific (excluding Japan)</td>
<td>40%</td>
</tr>
<tr>
<td>Europe, Middle East, Africa</td>
<td>34%</td>
</tr>
</tbody>
</table>

Source: COVID-19 Impact on IT Spending Survey (Survey conducted September 26–October 6), IDC, October 2020 | n = 649

Source: COVID-19 Impact on IT Spending Survey (Survey conducted April 22–29), IDC, April 2020 | n = 555
Work from Home Will Endure

By 2023, 60% of the G2000 have committed to providing technical parity to a workforce that is hybrid by design rather than by circumstance, enabling them to work together separately and in real time.

Global Work Location Shifts Over Time

Source: COVID-19 Impact on IT Spending Survey (Survey conducted August 5–17), IDC, August 2020 | n = 670 (NA = 100 APAC = 347, EMEA = 223)
Enabling an Agile Hybrid Workforce: NORTH AMERICA

PRESENTED BY:
Amy Loomis, Ph.D.
Research Director, Future of Work, IDC
Work Transformation: Remote and Essential Work Models

The global lockdown of workers in the spring of 2020 forced North American organizations to rapidly reconfigure technology resources to securely enable remote work.

Essential sectors of the economy were largely never able to shift to remote work; others, like education, have improved hardware and software to enable on-premises and hybrid ways of working.

Core to these new ways of working are the services, hardware, software, and infrastructure technologies that equalize the experiences of work and life across locations, technologies, and time zones.

New norms of working in complex environments have rapidly driven demand for enterprise-grade audio and video experiences.

Hybrid and remote work models are expanding work opportunities across the vast, diverse geographies of North American countries.
Recovery Model

38% of North American companies are prioritizing workplace transformation investments to *survive and thrive* in the Next Normal.

Source: COVID-19 Impact on IT Spending Survey (Survey conducted November 9–23), IDC, November 2020
Regional Distinctions Defining the Evolution of the Hybrid Workforce

IDC’s research suggests that a successful vaccine deployment will drive a reentry into on-premises work while still sustaining higher levels of remote workers.

North American Work Location Shifts Over Time

Q. Relative to the COVID-19 pandemic, what percentage of your country’s workforce was, is, or is expected to be in each of the following categories?

- Primarily work in the field
- Primarily work in a physical facility
- Primarily work from home

Pre-COVID-19:
- 14% Primarily work in the field
- 77% Primarily work from home
- 8% Primarily work in a physical facility

Now:
- 10% Primarily work in the field
- 54% Primarily work from home
- 36% Primarily work in a physical facility

Post-Vaccine:
- 18% Primarily work in the field
- 67% Primarily work from home
- 16% Primarily work in a physical facility

Source: COVID-19 Impact on IT Spending Survey (Survey conducted August 5–17), IDC, August 2020 | n = 100 (NA)
Remote and Hybrid Work Models Are Fueling Investments in Collaboration, Video Conferencing, and Peripherals

Throughout 2021, North American IT and business leaders will be making key technology investments to enable technology parity for all members of the workforce.

**Top Technology Investments for Technology Parity, 2020–2021**

<table>
<thead>
<tr>
<th>Technology</th>
<th>2020–2021 (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Team collaboration solutions</td>
<td>96%</td>
</tr>
<tr>
<td>Management and security of PC/mobile devices</td>
<td>95%</td>
</tr>
<tr>
<td>Video conferencing solutions</td>
<td>90%</td>
</tr>
<tr>
<td>Peripheral devices: audio headsets, video cameras</td>
<td>48%</td>
</tr>
<tr>
<td>Upgrades of PC/mobile devices</td>
<td>39%</td>
</tr>
<tr>
<td>Mobile/cellular connectivity</td>
<td>32%</td>
</tr>
</tbody>
</table>

Source: COVID-19 Impact on IT Spending Survey (Survey conducted August 5–17), IDC, August 2020

- **95%** of organizations stated that the number of users for video conferencing increased in 2020 versus 2019.
- **85%** of the users surveyed stated that they use video conferencing at least once a day.
- **45%** of organizations are planning to increase spending on conferencing solutions by more than 20% in 2021 versus 2020.
- **24%** of organizations plan to increase spending on unified communications by more than 20% in 2021 versus 2020.
Technology Investment Focused on Employee Health and Safety and Improved Digital Collaboration to Support Hybrid Work

Top 5 Benefits of Allowing a Portion of the Workforce to Primarily Work from Home
(% of respondents)

- Reduced absenteeism: 58%
- Improved employee health and safety: 56%
- Higher employee productivity: 48%
- Improved employee experience: 44%
- Reduction in real estate and facility management costs: 34%

Of U.S. companies surveyed...

92% are looking to adopt use of digital tools and video conferencing to accelerate the digitalization of work processes as a result of COVID-19.

86% are looking to provide more opportunities to work remotely.

Source: COVID-19 Impact on IT Spending Survey (Survey conducted August 5–17), IDC, August 2020

Enabling an Agile Hybrid Workforce: 

EUROPE

PRESENTED BY: 
Angela Salmeron 
Associate Research Director, European Future of Work, IDC
**Recovery Model: Hybrid by Design**

40% of European companies are prioritizing workplace transformation investments to *survive and thrive* in the Next Normal.

Source: IDC European IT Buyer Sentiment Survey, May 2020

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**BUSINESS FOCUS**

- **Cost optimization**: 41%
- **Business resiliency**: 26%
- **Targeted investments**: 19%
- **Future enterprise**: 3%

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**ECONOMIC SITUATION**

- **COVID crisis**: 19%
- **Economic slowdown**: 10%
- **Recession**: 41%
- **Return to growth**: 26%
- **The next normal**: 3%

Source: COVID-19 Impact on IT Spending Survey (Survey conducted November 9–23), IDC, November 2020

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Work locations are becoming more decentralized, leveraging a network of coworking spaces closer to commuter hubs. The impact is threefold:

- **Business resiliency**
- **Reduced carbon footprint**
- **Employee work-life balance**

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**Where will workplace transformation technologies help you the most?**

- **Cost optimization**: 60%
- **Business continuity**: 56%
- **Business resilience**: 59%
- **Operating a digital enterprise**: 51%

Source: IDC European IT Buyer Sentiment Survey, July 2020
# Hybrid Workplace Practices Are Mixed

Remote working legislation is more advanced in some countries than in others; however, the Next Normal is set to accelerate policies across the region.

## Nordic Region
- **Pre-COVID:** 25%
- **Post-vaccine:** 32%

The Nordic region has long embraced a culture of remote and flexible work: e.g., the Finnish Working Hours Act.

## Italy
- **Pre-COVID:** 12%
- **Post-vaccine:** 24%

Italy had a limited practice of remote working in the past. In response to the crisis, the Prime Ministerial Decree of 11 March 2020 recommended agile working methods.

## Spain
- **Pre-COVID:** 14%
- **Post-vaccine:** 34%

Remote and home-working was relatively unusual. A Royal Decree-Law was passed in September 2020 to provide a legal framework.

## Central and Eastern Europe
- **Pre-COVID:** 21%
- **Post-vaccine:** 27%

Czech Republic, Hungary, Poland, Slovakia, and Slovenia have long followed the European Framework Agreement for telework regulations.

## Germany
- **Pre-COVID:** 19%
- **Post-vaccine:** 22%

The German government announced plans in June 2020 to give employees the legal right to work from home.

## United Kingdom
- **Pre-COVID:** 10%
- **Post-vaccine:** 27%

Remote working was an unusual practice across many industry sectors, despite employees, having the legal right to request flexible working.

## France
- **Pre-COVID:** 16%
- **Post-vaccine:** 22%

French people have a legal right to ask their employers if they can **téléravail** (work from home).
Remote and Hybrid Work Models Are Fueling Investments in Video Conferencing and Security Solutions

Videoconferencing and telepresence equipment reached US$430 million in revenues in 2020 in Europe. European companies are investing in videoconferencing equipment to create the best meeting-room experiences. Source: IDC Europe, UCC Tracker

Top Technology Investments for Technology Parity, 2020–2021

(% European organizations)

- **Video conferencing solutions**: 29%
- **Management and security of PC/mobile devices**: 26%
- **Upgrades of PC/mobile devices**: 25%
- **Mobile/cellular connectivity**: 24%
- **Team collaboration solutions**: 24%
- **Peripheral devices: audio headsets, video cameras**: 23%

- **67%** of organizations stated that the number of users for video conferencing increased in 2020 versus 2019.
- **87%** of the users surveyed stated that they use video conferencing at least once a day.
- **24%** of organizations are planning to increase spending on conferencing solutions by more than 20% in 2021 versus 2020.

Source: IDC Europe, COVID-19 Impact Survey, Wave 12, September 25–October 5, 2020
Technology Investments Are Quickly Enabling Hybrid Work Models

Now organizational and cultural change must catch up, with the help of services and support.

Employee Productivity and Performance

From physical/digital presenteeism...

- 26% Deployment of software analytics monitoring employee activity
- 55% Despite initial reservations, employers agree they can trust employees

...To business outcomes

In agile organizations:

- Employees are part of cross-functional teams with end-to-end accountability.
- Insightful dashboards, with real-time data, enable teams to track progress against KPIs and make informed business decisions.
- Trust and transparency are empowering, driving employee engagement.

Working from Home: Key Benefits

1. Employee health and safety
2. Reduced absenteeism
3. Employee experience
4. Employee productivity
5. Real estate costs

Enabling an Agile Hybrid Workforce: ASIA/PACIFIC

PRESENTED BY:
Simon Piff
Vice President of Security Practice, IDC
Work Transformation: Workplace-First

As of October 2020, Korea, Taiwan, China, and Hong Kong were considered mostly back to “normal,” with workplace-first models for government, education, and local businesses.

International businesses (a smaller number of globally recognized brands) are operating a hybrid model.

74% of Asia/Pacific organizations anticipate a full return to the primary workplace in a post-vaccine world, likely by the second half of 2021.

Source: IDC Asia Pacific: Future of Work Study, 2020 | n = 418
Recovery Model

39% of Asia/Pacific organizations are investing in “crisis response” technology that either reduces operating costs or focuses on business continuity in reaction to the current situation.

Early remediation against the COVID-19 pandemic and strict regulation have enabled many Asia/Pacific countries to return to the office as a primary work location. The impact is threefold:

- **Improved productivity**
- **Expanded talent pools**
- **Resiliency**

Hybrid Workplace Practices Are Mixed

Working from home was quite common across the region pre-COVID, although for many it was not officially sanctioned. Policy changes and service and technology investments in most markets now fully support the hybrid working model (e.g., using Team A/Team B office rotation).

<table>
<thead>
<tr>
<th>Country</th>
<th>Pre-COVID</th>
<th>Post-vaccine</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>32%</td>
<td>39%</td>
</tr>
<tr>
<td>Indonesia</td>
<td>23%</td>
<td>35%</td>
</tr>
<tr>
<td>Malaysia</td>
<td>21%</td>
<td>28%</td>
</tr>
<tr>
<td>China</td>
<td>16%</td>
<td>19%</td>
</tr>
<tr>
<td>New Zealand</td>
<td>22%</td>
<td>29%</td>
</tr>
<tr>
<td>Singapore</td>
<td>8%</td>
<td>38%</td>
</tr>
<tr>
<td>India</td>
<td>28%</td>
<td>36%</td>
</tr>
<tr>
<td>Korea</td>
<td>22%</td>
<td>28%</td>
</tr>
</tbody>
</table>

**Hybrid Working Models**
- Indonesia: With so much commerce focused in the greater Jakarta area, the ability to avoid a commute is now being viewed as a significant driver of hybrid.
- Malaysia: Local management practices tend to prefer stronger oversight of employees and the hybrid model will take time to become accepted.
- Australia: Hybrid working models were largely already in place with relevant technical and policy support. Now this is an "option" for employees.
- China: A rapid recovery has seen this market return to the workplace fastest, backed by a very traditional approach to workplace location.
- New Zealand: As a market that is almost 100% recovered, the hybrid model is more a matter of employee choice. Legislation was already supportive.
- Singapore: The city-state has legislated that those who can work from home must work from home, and Team A/B rotations are the norm.
- India: Many industries rapidly grasped the hybrid model approach, as it minimizes the need for urban immigration that is a burden for employees and employers alike.
- Korea: Presenteeism in Korea is powerful, and many employees feel driven to be office-based to assure career progression, but it is slowly evolving to hybrid.
Remote and Hybrid Work Models Are Fueling Investments in Collaboration, Video Conferencing, and Security

Top Technology Investments for Technology Parity, 2020–2021
(% Asia/Pacific organizations)

- Team collaboration solutions: 40%
- Upgrades of PC/mobile devices: 39%
- Management and security of PC/mobile devices: 38%
- Video conferencing solutions: 33%
- Mobile/cellular connectivity: 26%
- Peripheral devices: audio headsets, video cameras: 19%

65% of Asia/Pacific organizations adopted collaboration platforms for the first time in 2020...
...a first in a region where business is highly social and career growth is based on face-to-face interactions.

Primary Work Location Shifts

IDC’s research suggests that a successful vaccine deployment will reinforce current trends to reentry into the workplace. It will also support increased numbers of remote and hybrid workers; however, management practices regionally prefer employees onsite. Support for the hybrid model requires more of a cultural shift than a technological one.

Asia/Pacific Work Location Shifts Over Time

Q. Before the COVID-19 pandemic, what percentage of your country’s workforce was, is, or is expected to be in each of the following categories?

- **Primarily work in the field**: Pre-COVID-19: 26%, Now: 21%, Post-Vaccine: 24%
- **Primarily work in a physical facility**: Pre-COVID-19: 55%, Now: 40%, Post-Vaccine: 52%
- **Primarily work from home**: Pre-COVID-19: 19%, Now: 38%, Post-Vaccine: 25%

*Source: COVID-19 Impact on IT Spending Survey (Survey conducted during August 5–17), IDC, August 2020 | n = 347*
Building an Improved Employee Experience and Business Value Through Adoption of Key Collaboration Tools Offering Privacy Features

The pandemic has challenged and changed old assumptions about remote work and worker productivity: Increased productivity and talent retention supported by lower operational expenses will drive further adoption of the hybrid and remote-working models over time.

Key Benefits for Remote Work in Asia/Pacific

<table>
<thead>
<tr>
<th>Benefit</th>
<th>(% of respondents)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase in productivity rate</td>
<td>58%</td>
</tr>
<tr>
<td>Increase in talent retention</td>
<td>53%</td>
</tr>
<tr>
<td>Decrease in operational expense</td>
<td>51%</td>
</tr>
<tr>
<td>Increase in talent acquisition</td>
<td>39%</td>
</tr>
</tbody>
</table>

Of IT and business leaders surveyed...

- 87% say team collaboration tools are important or very important.
- 83% say device support is important to selecting conferencing tools.
- 84% say it is very important for an IT solution to support privacy features, such as local control of camera and background anonymization.

The top priority for Asia/Pacific IT and business leaders is privacy features, such as local control of camera and background anonymization.
Technology and Endpoint Hardware Investments Are Targeted to the Hybrid Work Model

Hybrid work is here to stay. The economic and socially beneficial factors will pave the way for a hybrid working model to be the new normal.

Organizations are investing in employees’ hybrid work needs:

- **39%** say they **will support the new demands of a flexible/remote work style** by increasing endpoint investments.
- **40%** **will redesign their work models to support a hybrid workforce**, including physical workspace, tools, and endpoints.
- **48%** of market state privacy is a top priority regarding video and cameras.

Sources: IDC Global COVID-19 Survey, Wave 12, October 2020, n = 337; IDC Asia Pacific Future of Work Study, 2020, n = 418

Rise of new business modes:
As-a-service models for workspace and devices are becoming more appealing to organizations.
About the Analysts

Amy Loomis, Ph.D.
Research Director,
Future of Work, IDC

Amy Loomis is Research Director for IDC’s worldwide Future of Work market research service. In this role, Ms. Loomis covers the growing influence of technologies such as artificial intelligence, data analytics, robotics, augmented and virtual reality, and intelligent process automation in changing the nature of work. Her research looks at how these technologies influence workers’ skills and behaviors, organizational culture, worker experience, and how the workspace itself is enabling the future enterprise.

More about Amy Loomis

Angela Salmeron
Associate Research Director,
European Future of Work, IDC

Angela Salmeron has over 10 years of experience in the ICT industry and is currently an associate research director with IDC’s European Future of Work research service, based in London. In this role, she provides coverage of key technology trends across the Future of Work, including the digital workspace, security and trust, collaborative platforms, and the augmented worker.

More about Angela Salmeron

Simon Piff
Vice President of Security Practice,
IDC

Simon Piff is Vice President for IDC’s Asia/Pacific region, based in Singapore. He advises both technology and business leaders as well as IT suppliers on digital transformation, the CIO agenda, and digital trust, as they relate to the ability of organizations to gain improved returns on their IT investments around hybrid cloud infrastructure, mobile productivity, the value of analytics, and artificial intelligence (AI).

More about Simon Piff
Message from the Sponsor

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For more information, visit Poly.com
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