



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.**



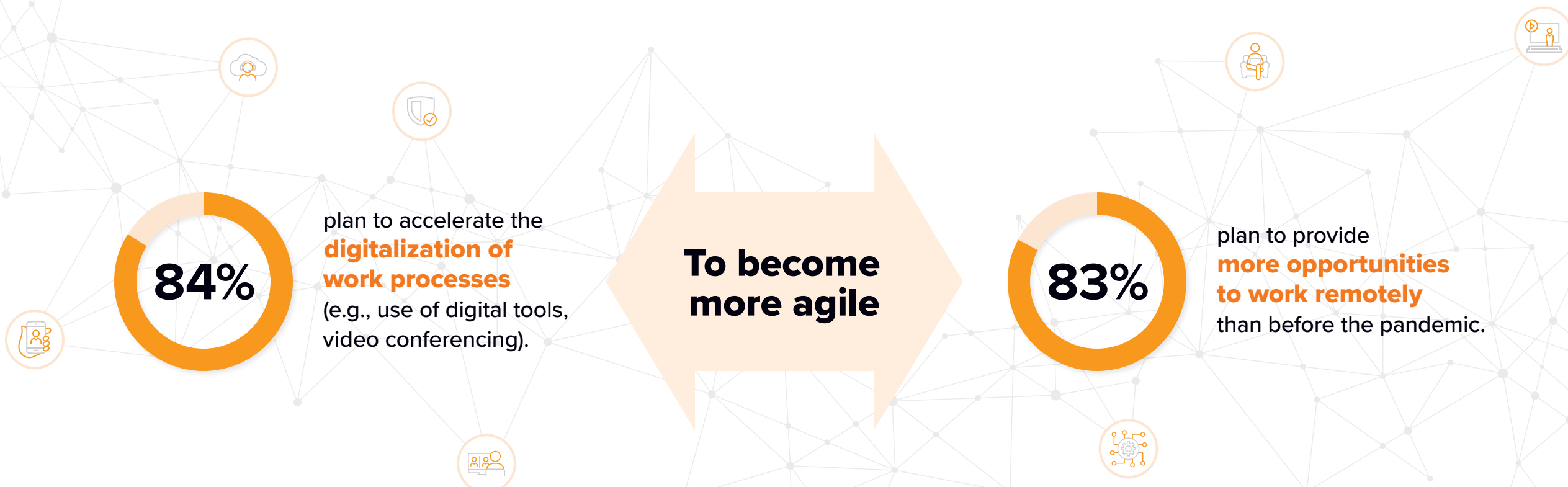
62%

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.**

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

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.



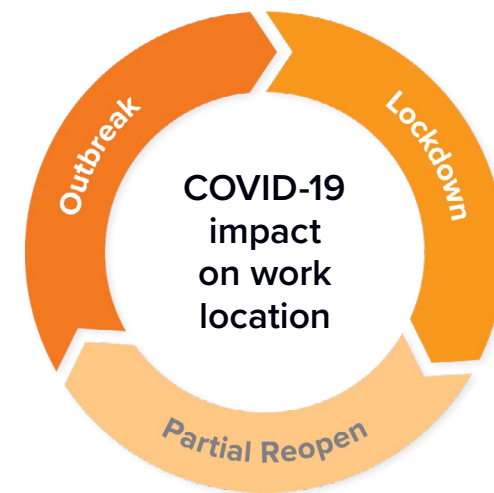
Source: World Economic Forum's 2020 Future of Jobs report

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.

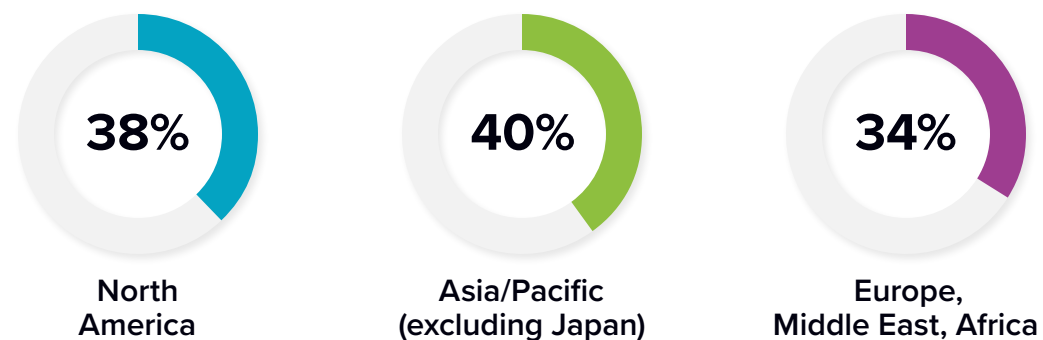


*IDC defines *technology parity* as the requirement that all workers have secure access to the resources required to do their jobs, no matter their preferred device or if they are local/remote/in the field.

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.

Percentage of Companies Worldwide Expecting to Adopt Hybrid Work Models:

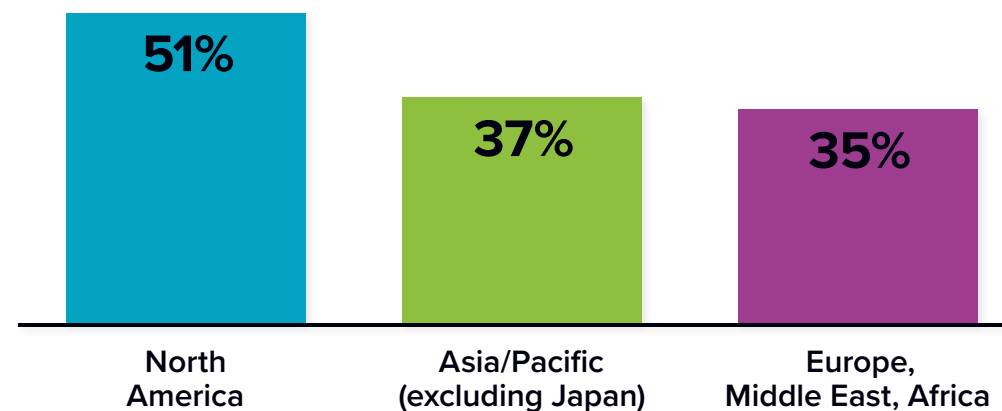


For 80% of business and IT leaders, device support (including mobile, tablet, desktop, etc.) is an important or very important factor when selecting a team collaboration tool.

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

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

(% of respondents)

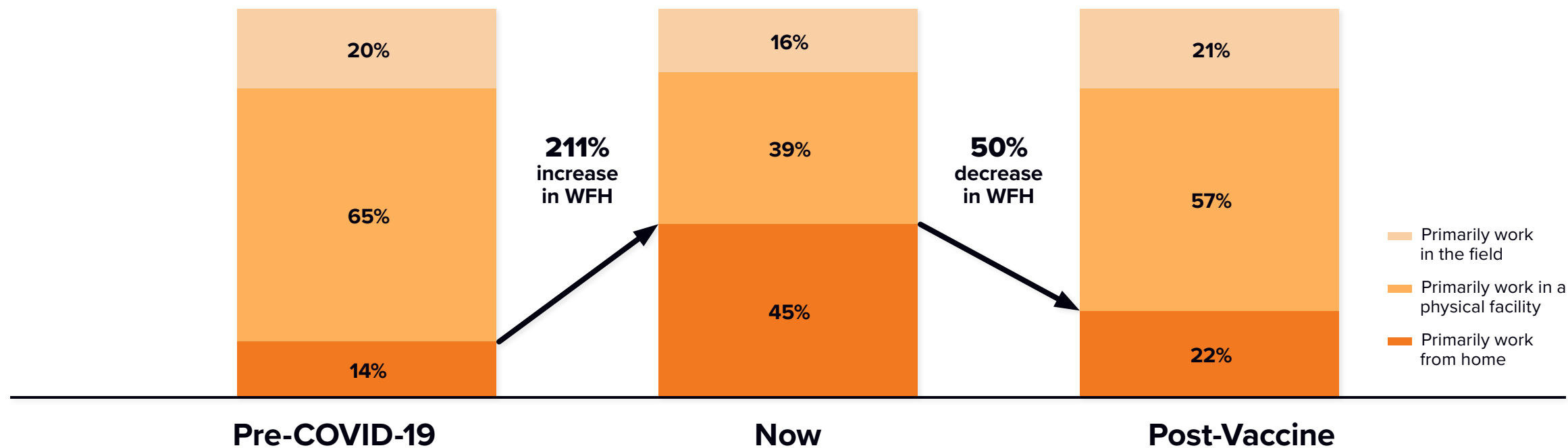


Source: COVID-19 Impact on IT Spending Survey (Survey conducted April 22–29), IDC, April 2020 | n = 555

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



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NORTH AMERICA

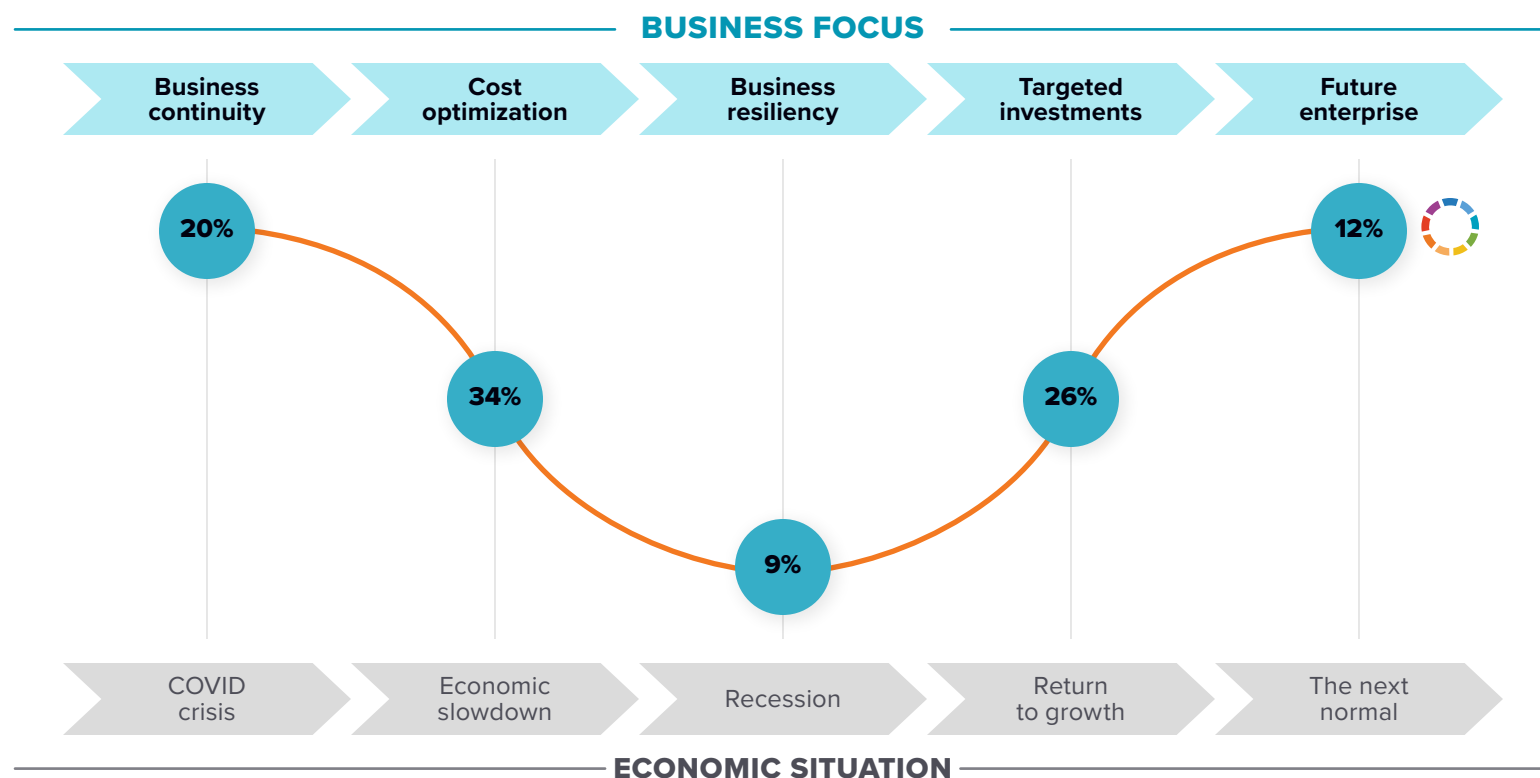
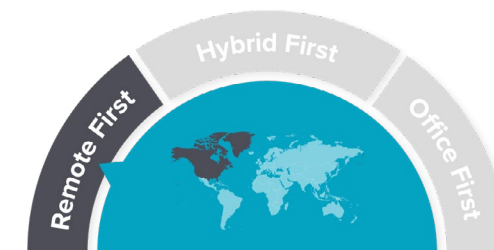
Work Transformation: Remote and Essential Work Models

- ▶ 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.

NORTH AMERICA

Recovery Model

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



Remote work has been normalized for knowledge workers, while requirements for essential workers become clear. Businesses and schools are experimenting with limited-opening models. The impact is threefold:

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

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

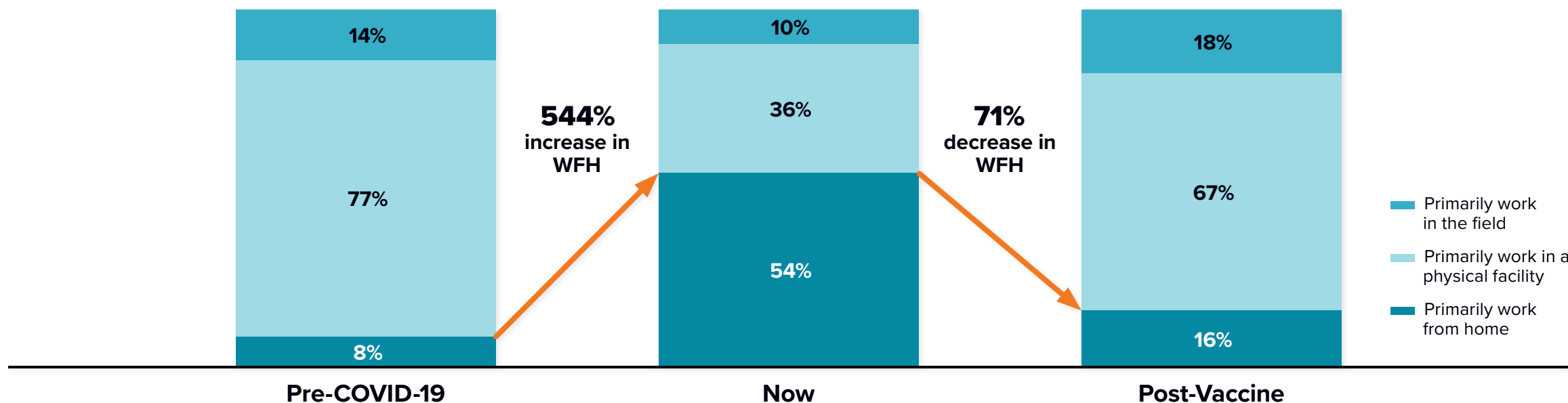
NORTH AMERICA

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?



Source: COVID-19 Impact on IT Spending Survey (Survey conducted August 5–17), IDC, August 2020 | n = 100 (NA)

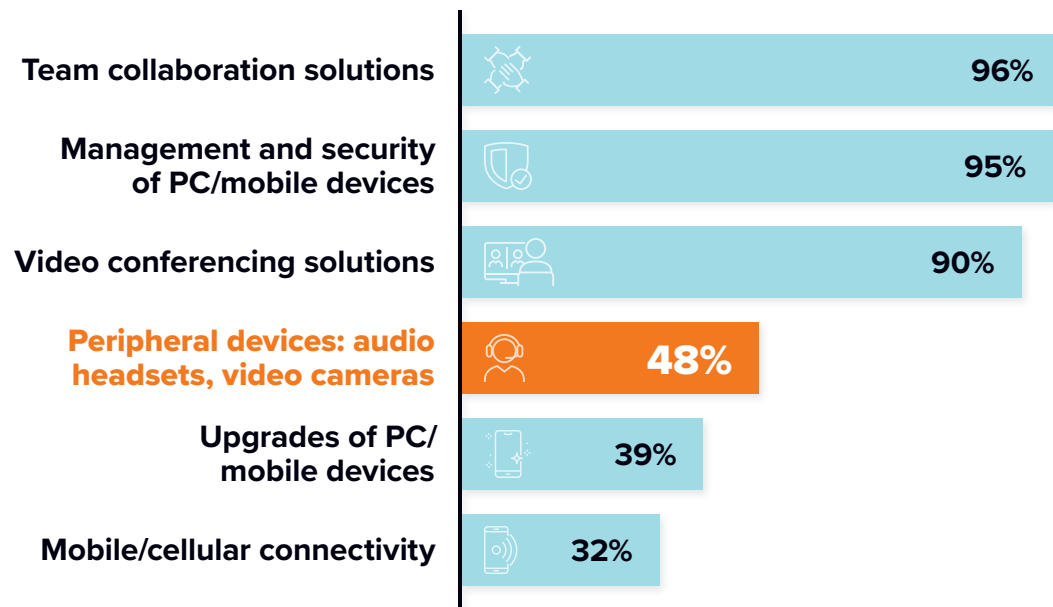
NORTH AMERICA

Remote and Hybrid Work Models Are Fueling Investments in Collaboration, Video Conferencing, and Peripherals

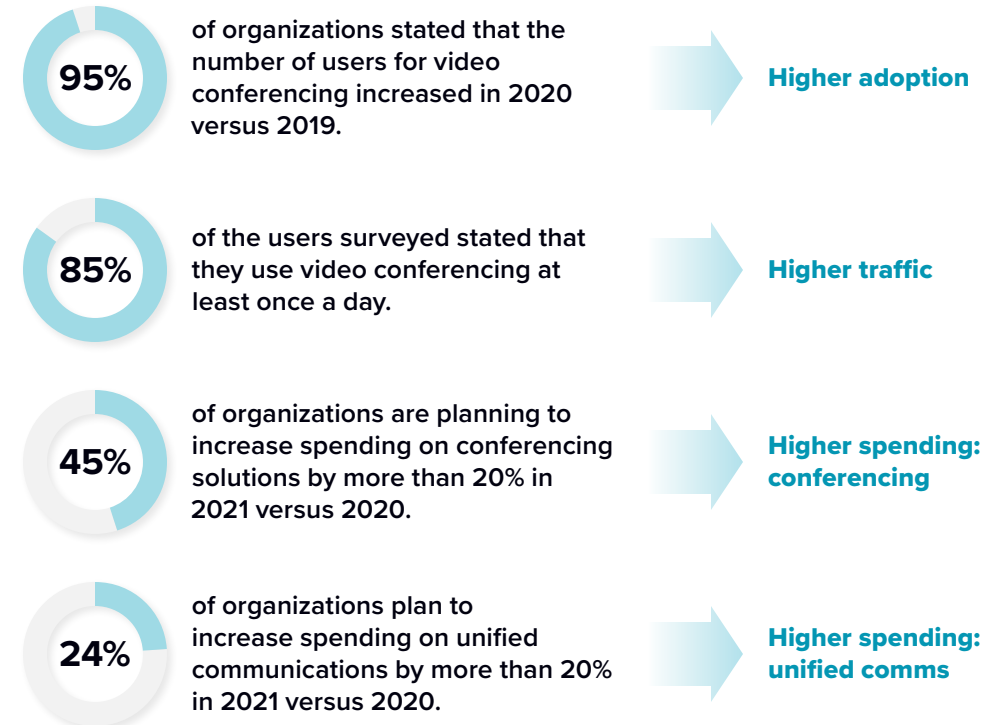
Throughout 2021, North American IT and business leaders will be making key technology investments to enable technology parity for all members of the workforce.

Top Technology Investments for Technology Parity, 2020–2021

(% North American organizations)



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



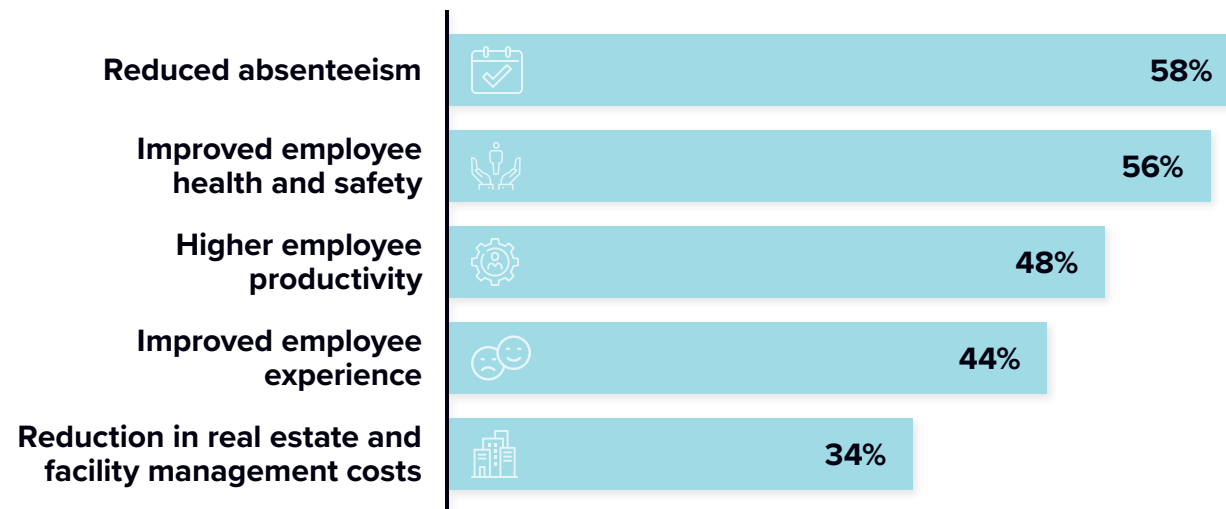
Source: COVID-19 Impact on IT Spending Survey (Survey conducted September 26–October 6), IDC, October 2020

NORTH AMERICA

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)



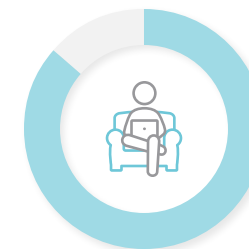
Source: COVID-19 Impact on IT Spending Survey (Survey conducted August 5–17), IDC, August 2020

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: World Economic Forum's 2020 Future of Jobs report

Enabling an Agile Hybrid Workforce: **EUROPE**



PRESENTED BY:

Angela Salmeron

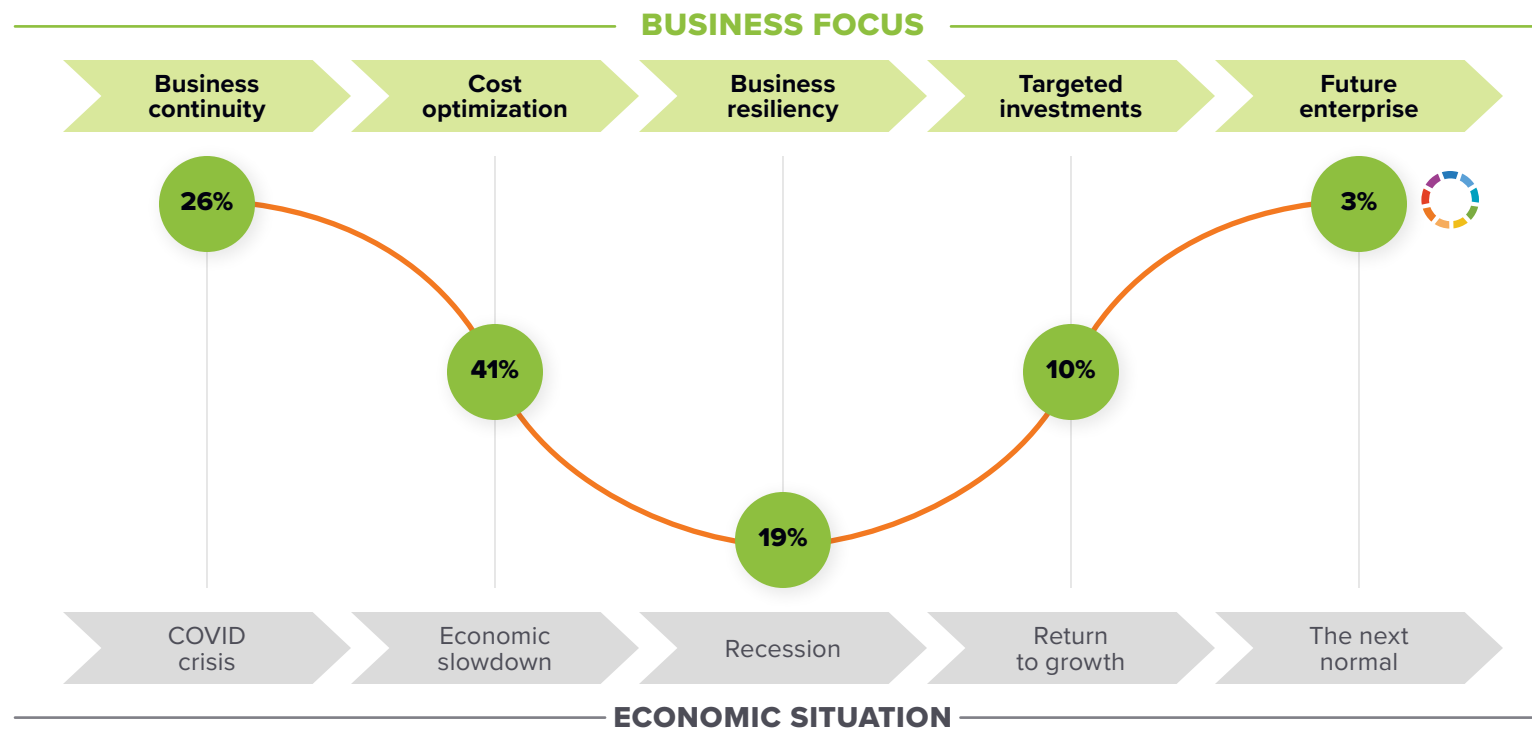
Associate Research Director, European Future of Work, IDC

EUROPE

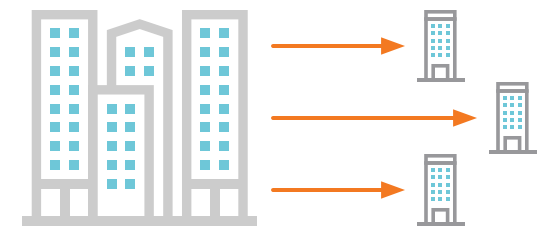
Recovery Model: Hybrid by Design

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



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



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**

Where will workplace transformation technologies help you the most?

60%
Cost optimization

56%
Business continuity

59%
Business resiliency

51%
Operating a digital enterprise

Source: IDC European IT Buyer Sentiment Survey, July 2020

EUROPE

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.

France

Pre-COVID: 16%

Post-vaccine: 22%

French people have a legal right to ask their employers if they can *télétravail* (work from home).

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.

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.

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.

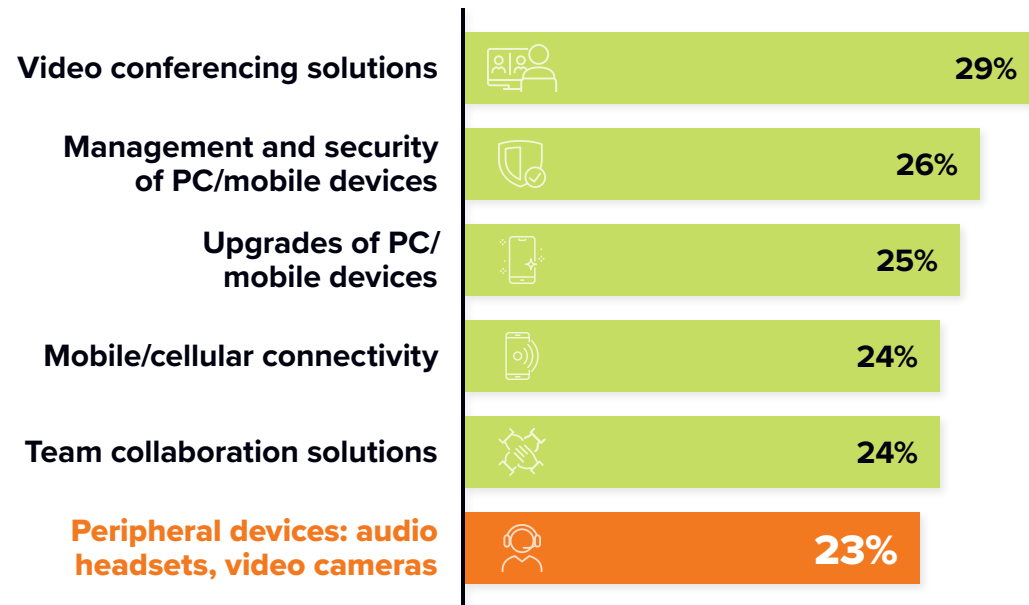
EUROPE

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)



Source: IDC EMEA, COVID-19 Impact Survey, Internal, Wave 10, August 5–14, 2020



Source: IDC Europe, COVID-19 Impact Survey, Wave 12, September 25–October 5, 2020

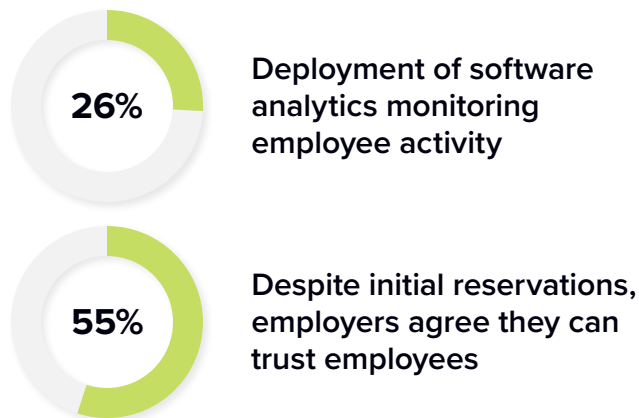
EUROPE

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...



Source: European Future of Work COVID-19, April 2020

...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

Source: IDC Europe, COVID-19 Impact Survey, Internal, Wave 10, August 5–14, 2020

Enabling an Agile Hybrid Workforce: ASIA/PACIFIC



[Click to access video](#)



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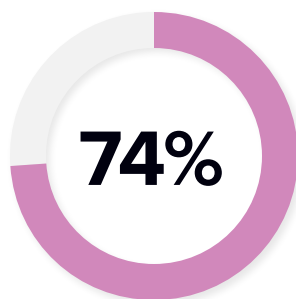
Simon Piff

Vice President of Security Practice, IDC

ASIA/PACIFIC

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.



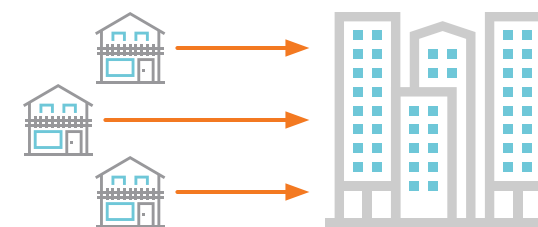
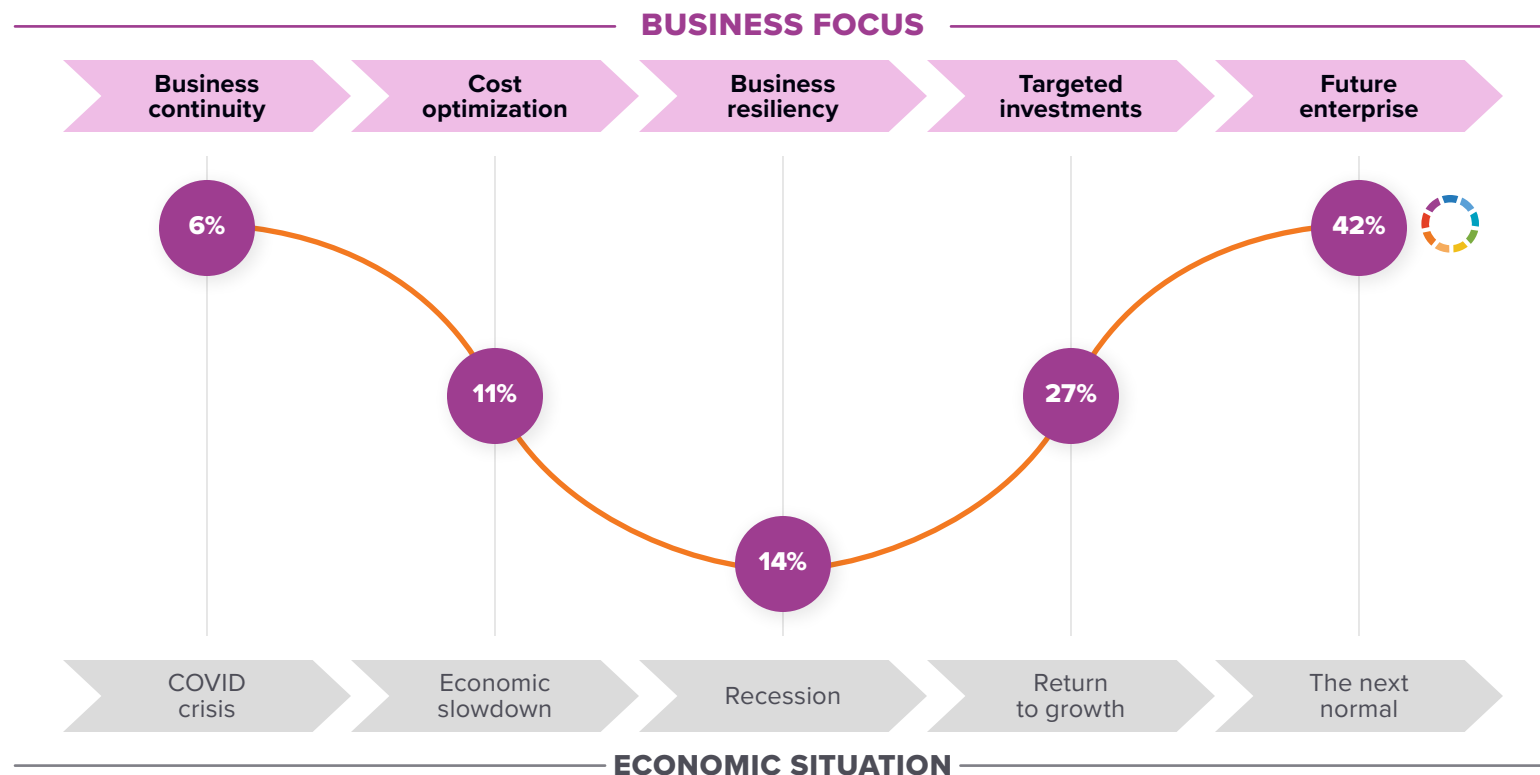
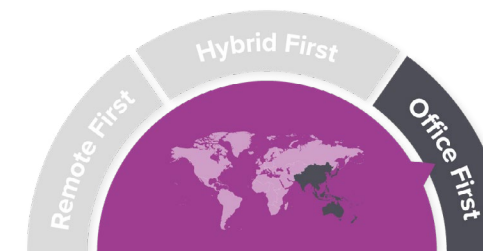
74% of Asia/Pacific organizations anticipate a full return to the primary workplace in a post-vaccine world, likely by the second half of 2021.

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

ASIA/PACIFIC

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**

Source: IDC Global COVID-19 Survey, Wave 13, November 3, 2020 | n = 337

ASIA/PACIFIC

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).

Australia

Pre-COVID: 32% | Post-vaccine: 39%

Hybrid working models were largely already in place with relevant technical and policy support. Now this is an “option” for employees.

Indonesia

Pre-COVID: 23% | Post-vaccine: 35%

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

Pre-COVID: 21% | Post-vaccine: 28%

Local management practices tend to prefer stronger oversight of employees and the hybrid model will take time to become accepted.

China

Pre-COVID: 16% | Post-vaccine: 19%

A rapid recovery has seen this market return to the workplace fastest, backed by a very traditional approach to workplace location.

New Zealand

Pre-COVID: 22% | Post-vaccine: 29%

As a market that is almost 100% recovered, the hybrid model is more a matter of employee choice. Legislation was already supportive.

Singapore

Pre-COVID: 8% | Post-vaccine: 38%

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

Pre-COVID: 28% | Post-vaccine: 36%

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

Pre-COVID: 22% | Post-vaccine: 28%

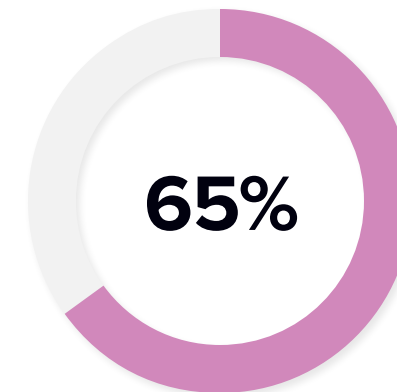
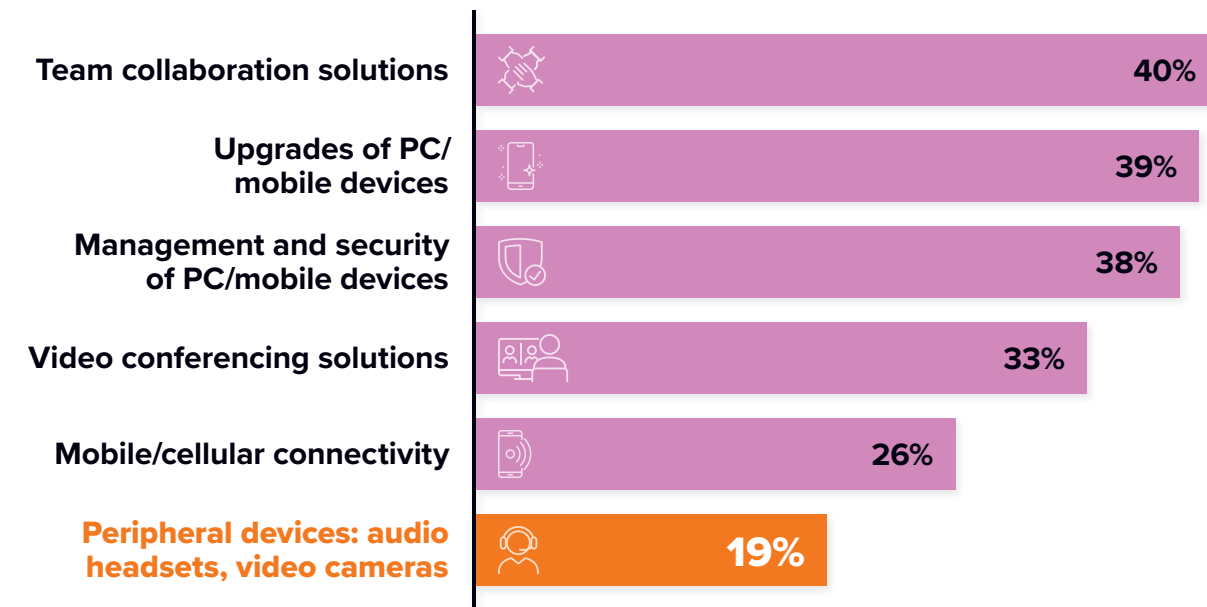
Presenteeism in Korea is powerful, and many employees feel driven to be office-based to assure career progression, but it is slowly evolving to hybrid.

ASIA/PACIFIC

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)



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.

Source: IDC Global COVID-19 Survey, Wave, 13 November 3, 2020 | n = 337

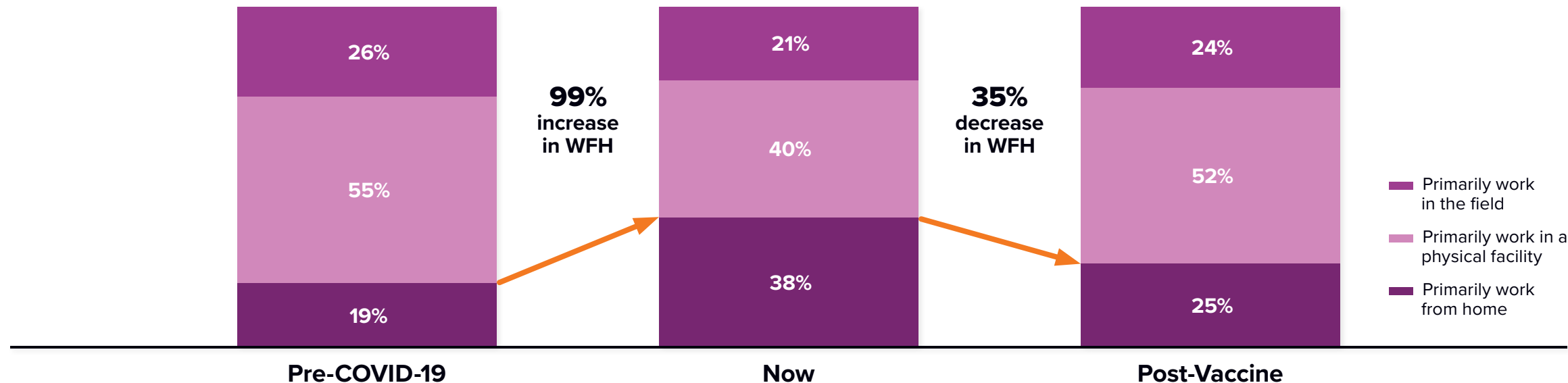
ASIA/PACIFIC

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?



Source: COVID-19 Impact on IT Spending Survey (Survey conducted during August 5–17), IDC, August 2020 | n = 347

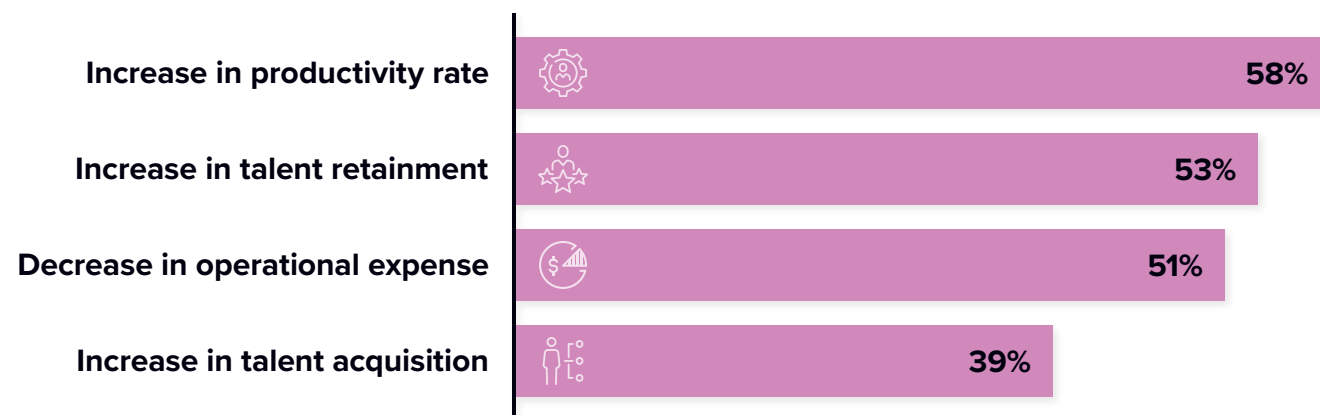
ASIA/PACIFIC

Building an Improved Employee Experience and Business Value Through Adoption of Key Collaboration Tools Offering Privacy Features

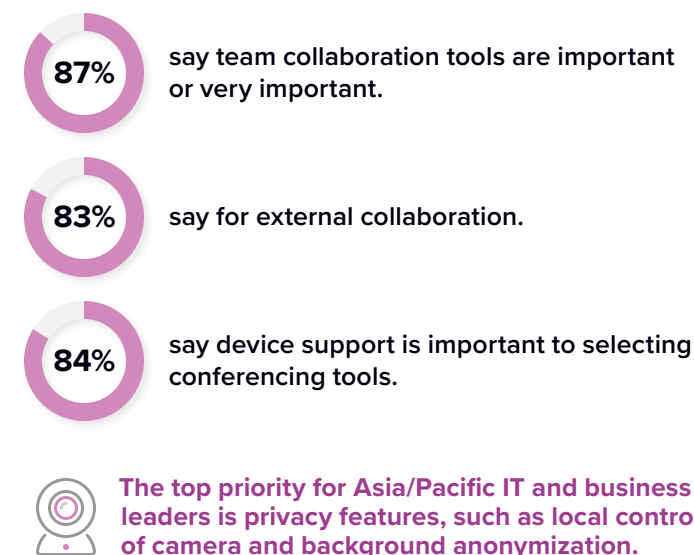
The pandemic has challenged and changed old assumptions about remote work and worker productivity: Increased productivity and talent retention supported by lower operational expenses will drive further adoption of the hybrid and remote-working models over time.

Key Benefits for Remote Work in Asia/Pacific

(% of respondents)



Of IT and business leaders surveyed...



Source: COVID-19 Impact on IT Spending Survey (Survey conducted during August 5–17), IDC, August 2020 | n = 347

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.

Management of endpoint devices



Collaboration



Conferencing solutions



All of these require higher-quality audio and video equipment that fits with the remote working space.

Rise of new business modes:

As-a-service models for workspace and devices are becoming more appealing to organizations.

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

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](#)

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