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The fluid workforce revolution

How a blended workforce strategy is key to success in the age of AI and automation

Introduction

Rapid digital transformation and a volatile business environment have brought a sea change in the way organizations view talent. Especially, in the light of changes induced by the COVID-19 crisis, yesterday's traditional hierarchical organization driven by presenteeism is becoming today's fluid ecosystem, with agility, adaptability, and flexibility and a renewed balance between virtual and on-premise work at its core. This is especially true in the way the workforce is orchestrated, with independent workers, freelancers, gig, and crowdsourced workers becoming increasingly important. We call this population the ***fluid workforce***.

The causes of this shift are twofold:

- On the demand side, disruptions and new technologies are constantly evolving the business landscape – demanding that organizations have an agile and adaptable approach to skills and talent if they are to remain relevant. The fluid workforce is an effective solution to the accelerated pace of change and the urgent need to access expertise quickly. Moreover, the current COVID-19 situation has also driven organizations to accelerate and explore innovative workforce models. They are using fluid workforce approaches in a range of areas, from "plug and play" approaches to meet spikes in demand – such as last-mile delivery – to the niche skills needed to drive innovative responses to the crisis. As organizations prepare to rebuild for the post-pandemic "new normal", distributed workforce models are likely to gain more prominence. Mathias Linnemann, CEO of Worksome – a marketplace for freelancers in Denmark – validates this trend, saying *"This crisis shows companies their dependence on digital solutions … Corporates will move forward with trimmer workforces, invariably using freelancers across the board."* [1]

On the supply side, an increasing proportion of the workforce prefers roles that offer flexibility, variety and fewer constraints. Stephane Kasriel, a tech entrepreneur and former CEO at Upwork Inc, a freelancing platform, says, *"If you ask people whether they truly want the constraints of a full-time job, or whether they want to have more flexibility in life, people are increasingly saying 'I would rather have more flexibility'. This is where we see the number of freelancers growing."* The new normal of 'remote working' methods driven by COVID-19 also acts as a factor for workforce to reconsider where they want to live/work to fulfill work responsibilities without the need to get fixated to a physical workplace

But what does this increasing use of a fluid workforce mean for the workplace and for the future of work? To answer this question, in December 2019, we conducted a unique survey embracing all sides of the debate: 500 executives from organizations using a fluid workforce across different sectors and countries, 4,000 fluid workers holding full-time and part-time fluid jobs in different sectors, and nearly 1,000 permanent employees. We further supplemented

the research with a survey of 250 executives in the month of May 2020 to understand the impact of COVID-19 on fluid workforce. In addition, we also conducted one-on-one interviews with executives engaging with a fluid workforce. Drawing on that extensive research, our report focuses on four key areas:

1. Is the fluid workforce becoming mainstream and a core part of the total organizational workforce?
2. Where is the fluid workforce now in terms of the skills they bring and what kinds of roles emerge across different functions?
3. Is there a disconnect between organizations' perceptions and fluid workforce's expectations? What are the challenges?
4. How can organizations build a hybrid workplace as they expand beyond their traditional recruitment boundaries for talent?

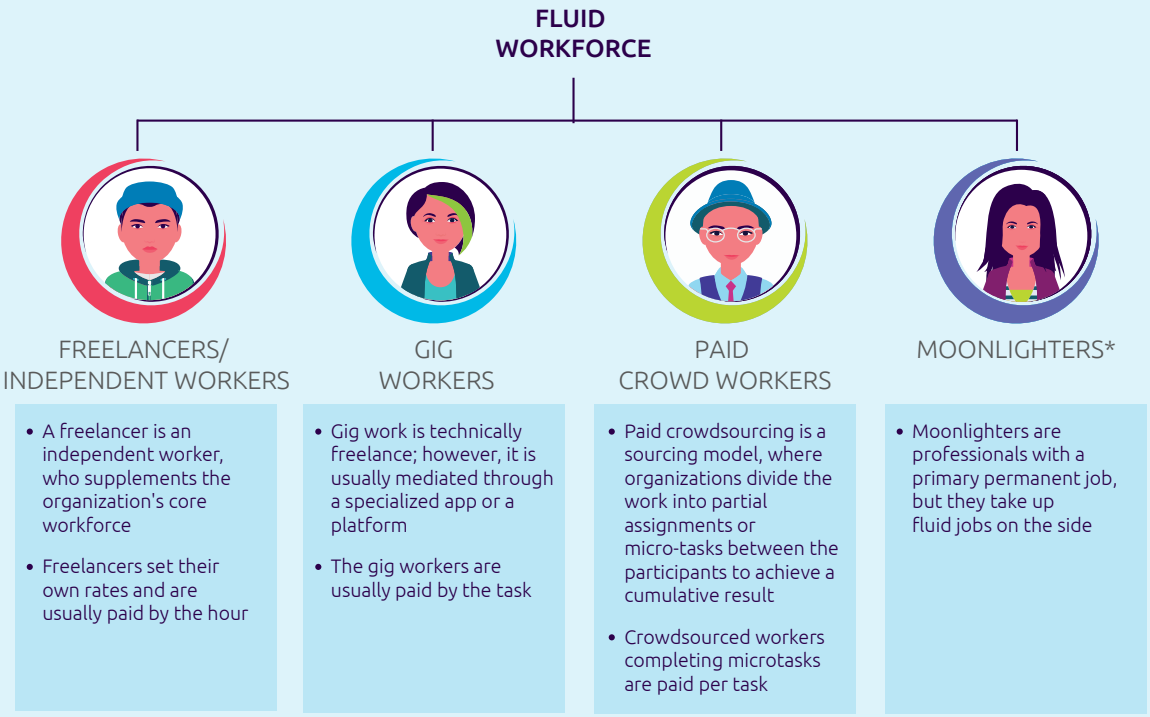
This report focuses on large organizations that utilizes fluid workforce for predominantly skilled jobs (ex., executives, consultants, analysts, experts across domains) and does not focus on service firms (ex., ride sharing firms, food delivery firms) utilizing temporary/contingent workforce.

> *"A fluid workforce allows companies to open up the book to a broad spectrum of talent than just what's on their doorstep. This system allows companies to bring in people just for the short term. These are people who can help us change direction or produce new projects. And, while they are here, they can capture and transfer their learning and expertise to our full-time employees."*
>
> Ley Wilson,
> Supplier and vendor management lead, Travelex

Defining the fluid workforce

We define the fluid workforce as freelancers, independent, gig, or paid-crowdsourced workers. In other words, individuals who work on a temporary basis with organizations (either full time or part time) and are not on any employer's payroll. In this research, we do not include sub-contractors from outsourcing or consulting organizations (see Figure 1).

Figure 1. Defining the fluid workforce



	FLUID WORKFORCE	PERMANENT EMPLOYEES
Nature of contract	Temporary	Permanent
Type of engagement	Not on the payroll	On the payroll of employer
Regulations	Employment rights and labor laws are currently evolving; varies by country	Structured employment rights and labor laws
Benefits	Limited/No benefits (insurance, gratuity, allowances, etc.)	Benefits such as insurance, gratuity, stock-options, bonus, etc.

*For moonlighters – nature of the job profile and extent it is permissible differs by country.
Source: Capgemini Research Institute.

Fluid workers are becoming a core part of the organizational workforce

Our research shows that more than 65% of executives agree that the gap between the skills their organizations need and the ones that people possess is widening. This is creating significant recruitment challenges. Moreover, in today's highly complex and volatile landscape due to COVID-19 pandemic, businesses must be both resilient and agile – seamlessly accommodating evolving market demands and skills needs and being able to increase or decrease their capacity rapidly. With the COVID-19 situation, organizations are questioning the composition of the workforce, and not just from a virtual vs. /on-premise perspective but also from fluid vs. fixed workers share. The search for talent has indeed become fluid.

A fluid workforce is common in several sectors, such as ridesharing or food delivery. However, as large organizations seek fresh perspectives and new areas of expertise, the fluid workforce economy is becoming increasingly characterized by the talent an individual brings and the contribution of skilled freelancers who add significant value, including skills transfer. Ley Wilson, supplier and vendor management lead at Travelex, says, *"A fluid workforce allows companies to open up the book to a broad spectrum of talent than just what's on their doorstep. This system allows companies to bring in people just for the short term. These are people who can help us change direction or produce new projects. And, while they are here, they can capture and transfer their learning and expertise to our full-time employees."*

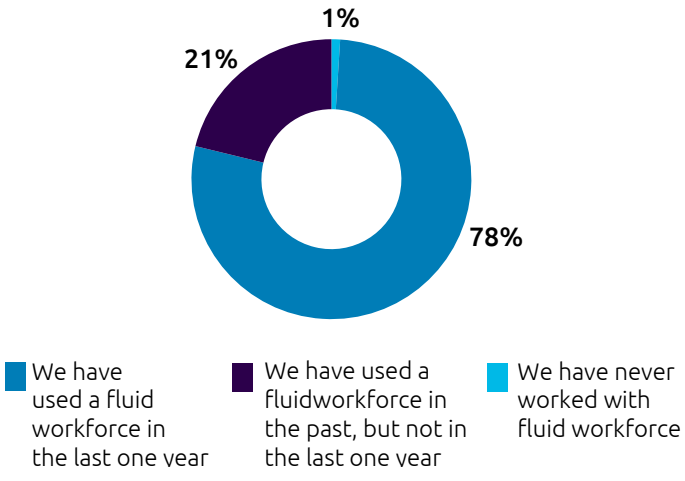
Our research also suggests that organizations have started to see the fluid workforce as a top talent acquisition strategy and not just a short-term skills procurement. Around 68% of the organizations we surveyed say that the fluid workforce has become a crucial part of workforce planning.

The fluid workforce approach is mainstream, with four in five organizations using it

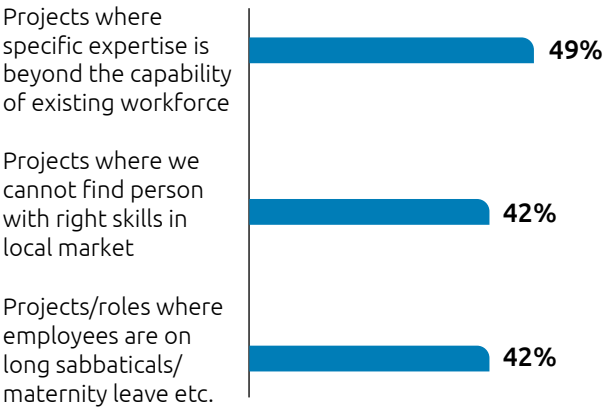
Nearly 80% of the organizations surveyed say that they have used a fluid workforce over the past year (see Figure 2). More than one in two organizations say that the number of fluid workers have increased in that period. Figure 2 also shows that close to half of the organizations utilizing fluid workforce have resorted to them for projects where the specific expertise needed is beyond the capabilities of the existing workforce or where they are unable to find the right talent within the local talent pools. Our analysis also highlights that the India and the US are leading the way in fluid-workforce adoption at a country level, and public sector and banking at a sector level (see Appendix 1 for more details).

Figure 2. Organizations' use of a fluid workforce

Have you utilized fluid workforce in the last one year?



What are the most common situations in which you tend to hire fluid workers?



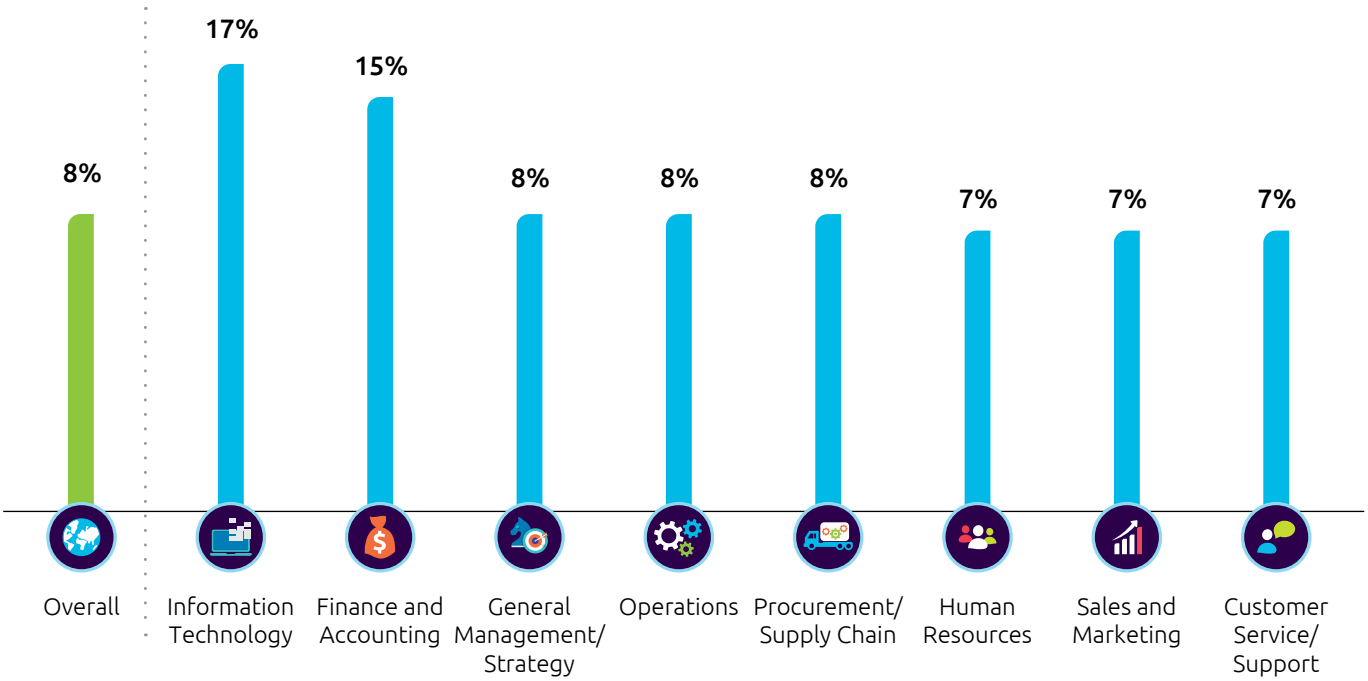
Source: Capgemini Research Institute Fluid Workforce Research, December 2019, N=500 organizations ;N=389 organizations using fluid workers in the last year.

78%

of the organizations surveyed say that they have used a fluid workforce over the past year

As Figure 3 shows, the fluid workforce constitutes about 8% of the total workforce in organizations (among the organizations in our research that have used a fluid workforce in the past year). At a functional level, IT is the most enthusiastic adopter (17%), followed by finance and accounting (15%). The fluid workers we surveyed confirmed this finding: around 27% of the fluid workforce we surveyed worked in IT and 13% in finance and accounting. Our research also confirms that the demand for new-age skillsets like AI/ML/blockchain specialists in IT and data scientists and transformation experts in finance are driving the use of the fluid workforce.

Figure 3. Fluid workforce as a % of workforce in functions



Source: Capgemini Research Institute Fluid Workforce Research, December 2019, N=389 organizations using fluid workers in the last year.

COVID-19 is further accelerating the usage of fluid workforce among organizations

The way we work was already changing before the COVID-19 pandemic, the crisis has further accelerated critical trends in a new future of work. To understand the impact of COVID-19 crisis on fluid workforce from an organizational perspective, we launched a new survey in the month of May 2020 among 250 global cross-sector senior executives. As figure 4 shows, the demand for fluid talent is increasingly on the rise. Overall 70% of all organizations agreed that the current COVID crisis will lead them to hire more fluid workforce in the future. Of the organizations already using a fluid workforce in the last one year, nearly three-fourth plan to increase utilization of fluid workforce in the future.

Figure 4. Impact of COVID-19 on planned usage of fluid workforce

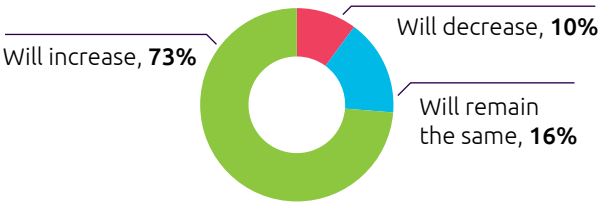
The current COVID crisis will lead us to use more fluid workers in the future

70%

organizations agreed that the current COVID crisis will lead them to hire more fluid workforce in the future

Source: Capgemini Research Institute, Fluid Workforce in COVID-19 survey, May 2020, N=252 organizations.

In the light of current COVID crisis, how do you see your usage of fluid workforce evolving in the next 12 months



Source: Capgemini Research Institute, Fluid Workforce in COVID-19 survey, May 2020, N=188 organizations using fluid workforce in last 1 year.

The drivers of this shift are multifold:

- As the pandemic has served as a crash course in virtual and remote working for many, it has alleviated many reservations they previously had about productivity of fluid workforce, which traditionally has worked remotely. In our supplementary survey in May 2020, nearly 70% of the organizations agree that they will continue work from home as a dominant way of work going forward. Many examples are emerging – for instance, Nationwide, a US based insurance organization, is looking at a hybrid operating model that will shift employees at most locations to a permanent remote work environment. Confectionary giant, Mondelez is also rethinking on where people work. Dirk Van De Put, CEO of Mondelez says, *"Maybe we don't need all the offices that we currently have around the world. So, there is a major effort going…".*[3]
- As organizations navigate through this crisis, and move towards the new normal, they also look at cutting fixed employee costs. Our survey during the times of crisis reveals that nearly 70% of organizations are planning to replace some of their permanent employees with fluid workforce. When asked about the 'extent' of this displacement, we found that organizations are roughly looking at around 12% of the permanent roles to be moved to fluid. Organizations are looking at these moves also to take advantage of flexible staffing based on business needs and bring down recurring costs – as the payments are project based.
- The demand for critical skills and leveraging from the vast experience of fluid workforce is another key driver. The skills demand goes across a range of functions. Our survey reveals that 89% of organizations plan to expand usage of fluid workforce across a wider range of functions. Moreover, the remote working models driven by COVID-19 situation has further expanded the skills availability for organizations, for instance, the tele-migrants (people in one country working for offices in another country) who are already tuned to the virtual ways of working.

As the usage of fluid workforce increase, it becomes crucial for organizations to promote a seamless working culture among the permanent and fluid workforce. There is a need for reinvention of the manager's roles and skillsets in engaging with these varied workforce, especially in the current remote working models driven by COVID-19. The crisis has also shown the need to carefully look into the workplace conditions of fluid workers from the health and safety viewpoint as the last few months have made the inequalities of different workforce groups transparent. Organizations leveraging the flexibility of fluid workforce, need to support safer and secure labor conditions as part of the societal responsibility. Are organizations recognizing these factors? We delve on this later in our report

In large organizations, the demand for fluid workers will increase by more than 40% in the next 12 months

Onboarding fluid workers is no longer a phenomenon of small organizations and startups, as this culture is also coming to large companies. They are witnessing a massive shift from traditional, full-time workforce to fluid, independent workers.

In light of the current COVID-19 pandemic, to demonstrate the magnitude of growth of fluid workforce in large organizations (with more than $500M revenue) in the next 12 months, we built a model considering six major sectors – automotive, retail, consumer products goods, financial services, utilities, and the public sector. Drawing from our survey results, we estimated the growth of the fluid workers in these large organizations. We found that over the 12 months, the large organizations will deploy nearly 80 million fluid workers in six priority sectors, representing an increase of 40% from 2019 (see Figure 5). (For more details, please see appendix 2.)

Figure 5. Large organizations will use nearly 80mn fluid workers in the next one year

Factor	Quantum (in millions)
At present, no. of fluid workers in large organizations in six primary sectors* [A]	56.7
In the next one year, expected number of fluid workers in organizations who already use them today (survey data) [B]	67.1
In the next one year, expected number of fluid workers in organizations who do not use them today (survey data) [C]	12.6
In the next one year, total number of fluid workers in large organizations [D=B+C]	79.6
Expected increase over the next one year [D/A-1]	**40%**

Note: *Six primary sectors include automotive, retail, consumer products goods, financial services (including banking, insurance and other financial services), utilities, and the public sector.

Source: Capgemini Research Institute Fluid Workforce Research, December 2019, N=500 organizations; Capgemini Research Institute, Fluid Workforce in COVID-19 survey, May 2020, N=252 organizations. Hoovers; Marketline advantage.

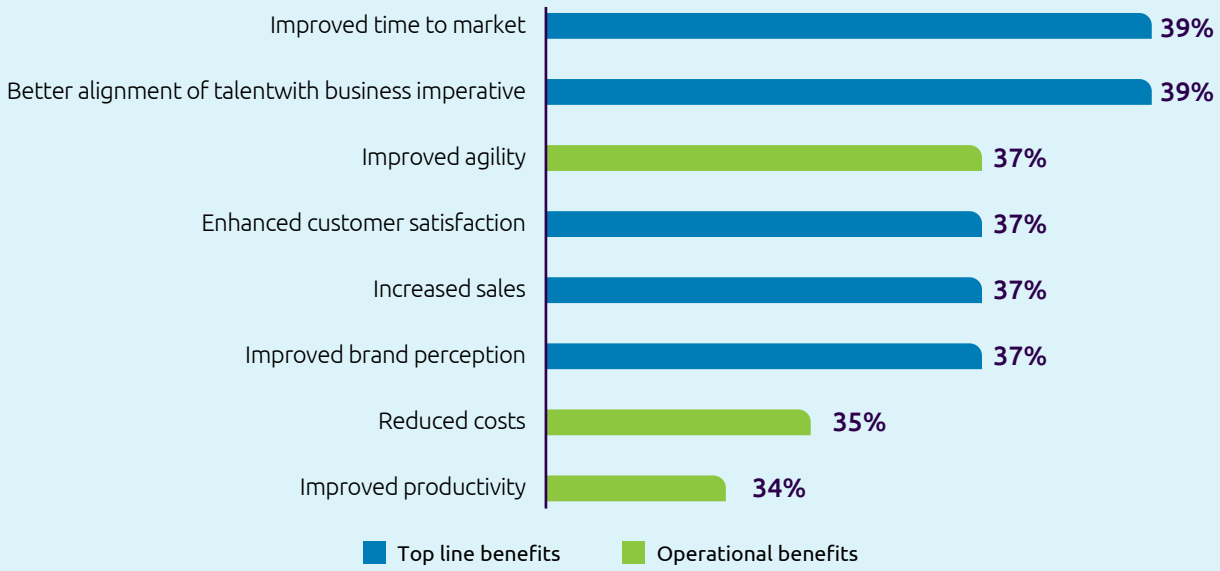
Beyond cost savings, organizations focus on agility and bridging the critical skills gap with fluid talent

As figure 6 shows, cost savings, out of hours support and gaining competitive advantage are key drivers for organizations to use fluid workforce. In terms of benefits, as figure 7 shows, apart from costs (35%), organizations are gaining other key benefits as well – faster time to market, talent expertise and agility.

Figure 6. Key drivers for using fluid workforce (% of organizations choosing the indicated driver among top 5)

Source: Capgemini Research Institute Fluid Workforce Research, December 2019, N=389 organizations using fluid workers in the last year.

Figure 7. Benefits of fluid workforce (% of organizations choosing the indicated benefits



Source: Capgemini Research Institute Fluid Workforce Research, December 2019, N=389 organizations using fluid workers in the last year.

AI and automation accelerating and enabling the rise of fluid talent

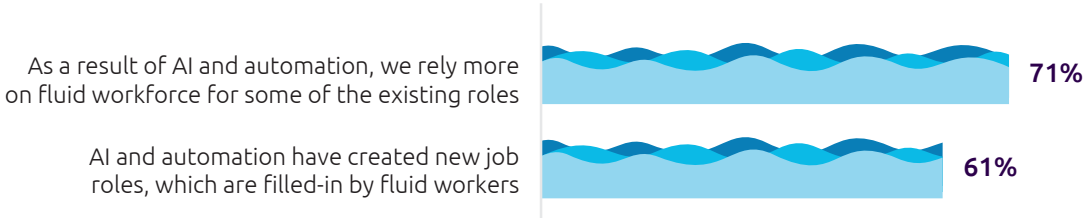
Our previous research into the impact of automation on jobs found that well over a third of organizations (37%) said that they would rely more on fluid talent in the age of AI and automation.[4] Nina Sundby, head of talent acquisition, leadership development & learning at Telia, confirms this, *"When we digitized our customer care capability, we reskilled the permanent workforce to work with automation. It also brought opportunities to bring in fluid talent to fill in those short-term, temporary demands brought in by automation."*

In this latest research, as Figure 8 shows, 71% of organizations say that, as a result of AI and automation, they put a greater reliance on fluid workers for some existing roles.

Today's COVID-19 situation has also accelerated innovation and experimentation in the use of robotics and automation. For example, Alibaba, Amazon, and JD.com have invested in drone-based delivery; and UVD Robots (Denmark) and Yuoibot (China) are developing approaches to robotic telemedicine. US food and drug retailer Albertsons Companies has decided to implement AI-powered virtual assistant in response to the increasing switch of customers to the web and mobile shopping apps due to the coronavirus pandemic. In this scenario, with organizations experimenting with technologies in shorter cycles, they are likely to turn towards fluid talent more.

More than 60% of organizations in our research also agree that AI and automation have created new job roles (such as drone operators, AI writers, AI developers etc.), that are delivered by fluid workers.

Figure 8. AI and automation accelerating the growth of the fluid workforce



Source: Capgemini Research Institute Fluid Workforce Research, December 2019, N=389 organizations using fluid workers in the last year.

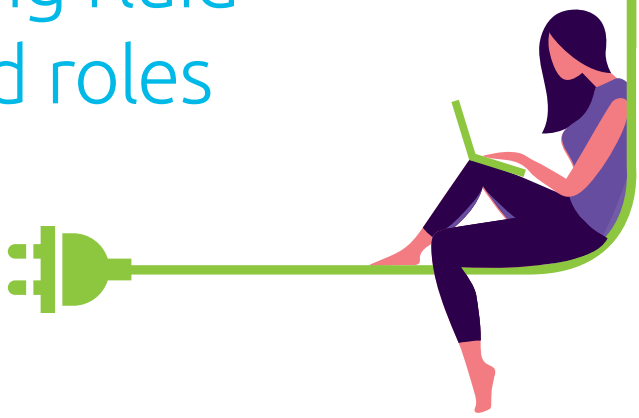
As well as accelerating the need to resort to fluid talent, AI and automation are also enabling this trend by connecting organizations and fluid workers and supporting them for the duration of their collaboration throughout the organization:

- AI and automation can help dynamically match people's skills and interests with the job to be done. Companies like Ford and Orange Telecom are using an AI-based solution to match projects with freelance programmers who have the exact skills required.[7]
- The possibilities of AI and automation in this area are huge. For example: predicting the personality attributes of fluid candidates during screening, on-demand allocation of work through AI-supported workforce planning tools and building customized career plans (by suggesting appropriate learning and development modules).

When you do a proof of concept, you require a different range of skill sets, which in most cases you'll not be able to find in the internal resource pools. Moreover, much of this PoC work may not warrant having a dedicated workforce for 100% of the time."

Nitin Sethi,
Global IT director, business transformation and engagement at Visteon Corporation

Organizations are plugging critical expertise gaps by using fluid workers in high-skilled roles



Organizations use fluid workers in a variety of high-skilled job roles across functional areas

According to the World Economic Forum, at least 133 million new roles may emerge globally by 2022 as a result of the new division of labor between humans, machines and algorithms.[8] The demand for niche-skills is rising, and the technology and skills landscape is changing so rapidly that the skills which are in demand today can quickly become obsolete. Developing some of these skills in-house might not meet speed of change required – as it is a complex, long and costly process. As a result, organizations are transitioning these high-skilled roles that are expertise-based to fluid workforce:

- P&G's fluid workforce encompasses management consulting, web development, graphic design and data science-related related roles.[9]
- In 2017, GE partnered with Upwork to create a network of millions of independent professionals with in-demand skills. They assembled PhDs and statisticians who helped them uncover $800 million in opportunities. These specialists also used predictive modelling to increase the sales department's conversion rate by 17%.[10]

Erin Hicks, Global HR operations and contingent workforce expert at Experfy – a platform connecting data science and AI experts with organizations – says, "We have definitely seen an influx of really highly skilled talent, and a demand for such talent. So, back in 2014, you saw a lot of customer service use cases. Now, while that is still thriving, we are definitely seeing a lot more of the specialized skill sets coming forward for fluid workers." Our research also confirmed that organizations use fluid workers in a range of high-skilled roles across functions (see Figure 9), and majority of these roles are being delivered remotely:

- From an IT function perspective, job roles requiring new skillsets are where fluid workforce are most used. Of the organizations using a fluid workforce in IT, 59% use it for AI/ML related roles, 56% use it for agile coaching, and 50% use it to fill blockchain specialist roles. Also, many organizations rely on fluid workers to boost experimentation and innovation. Nitin Sethi, global IT director, business transformation and engagement at Visteon Corporation – a US-based automotive components firm – says, *"When you do a proof of concept, you require a different range of skill sets, which in most cases you'll not be able to find in the internal resource pools. Moreover, much of this PoC work may not warrant having a dedicated workforce for 100% of the time."*
- High-skilled fluid job roles are emerging in finance and accounting as well especially in roles demanding a specialized skill set or expertise in a specific area. For instance, of the organizations using a fluid workforce in finance and accounting as well, more than 60% use it for data science-related roles.
- In general management as well, fluid job roles are emerging across strategic advisory dimensions – from business development, merger and acquisition specialists to interim c-level executives.

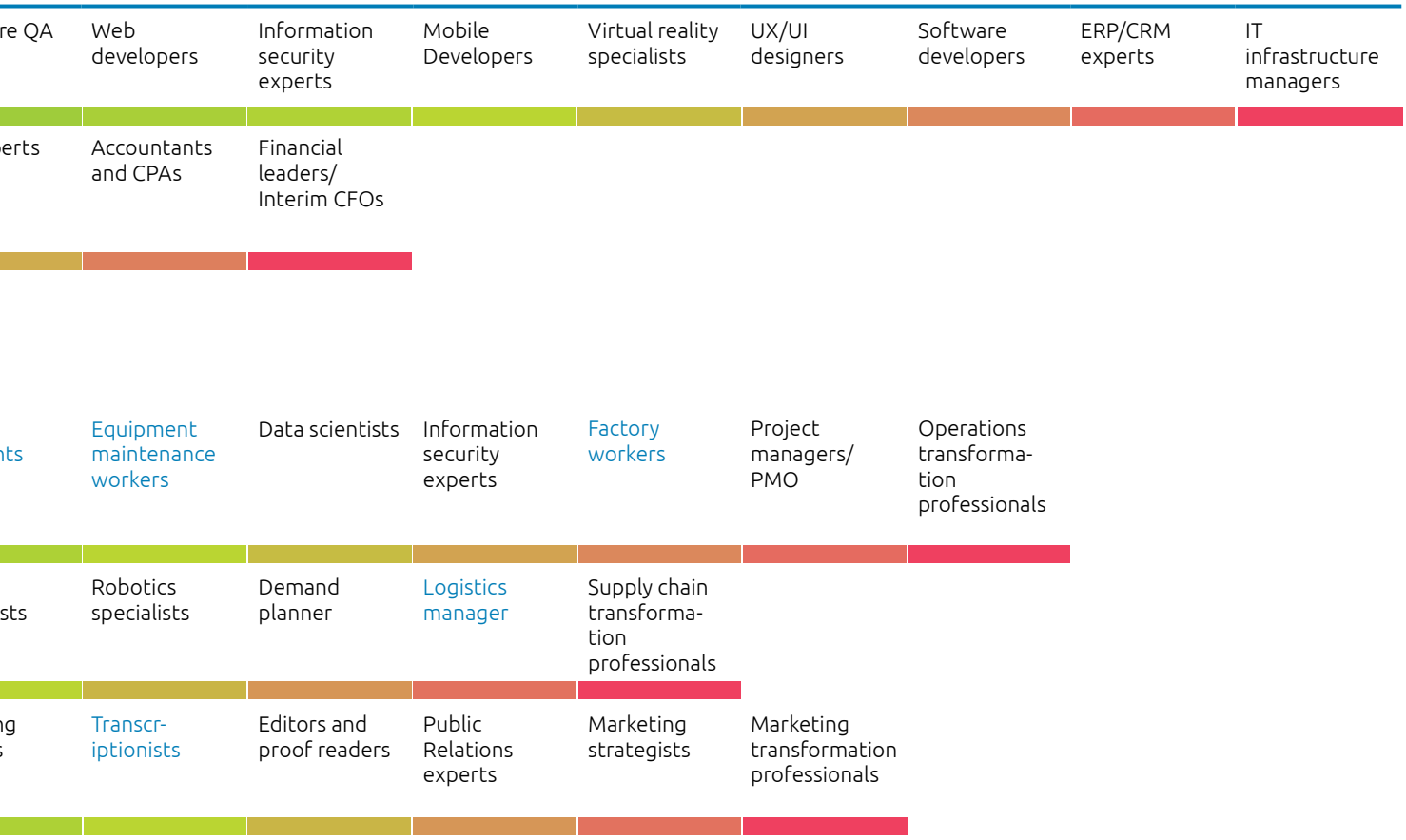
Figure 9. Job roles where organizations engage a fluid workforce within each function (excludes individuals from outsourcing or consulting firms working with client organizations)

Information Technology	AI/ML specialists	Agile Coaches	Blockchain specialists	IOT specialists	Data scientists	IT transforma-tion experts	Robotics specialists	Softwa testers
Finance and Accounting	Financial analysts	Data scientists	Finance transforma-tion professionals	Financial risk managers	Controllers	Bookkeepers	Financial planners and CFAs	Tax exp
General Management/ Strategy	Business Development experts	M&A specialists	Strategy/ Innovation experts	Interim C-level executives	Organizational design experts	Business transforma-tion consultants		
Operations	IOT specialists	Travel managers	Robotics specialists	Change management experts	AI/ML specialists	Virtual reality specialists	Process improvement and redesign experts	Admin assistar
Procurement/ Supply Chain	Sourcing experts	Delivery Executives	Fulfilment Centre Executives	Inventory management specialists	IOT specialists	Data analytics/ Data Scientists	Blockchain specialists	AI/ML speciali
Sales and Marketing	Translators	Data scientists	SEO specialists	Telemarketer	Email marketers	Creative Service/ Graphic Designers	Social media marketers	Brandir experts
Customer Support	Live chat agents	Email tech support agents	Phone support specialists	Technical support specialists	Data scientists	Customer service representa-tives		
Human Resources	Talent acquisition professionals	Payroll processing specialists	HR strategists	Talent mobility experts	HR and culture transforma-tion specialists	HR data analytics experts	Training and development specialists	
Others	Facility management personnel	Security personnel	Internet researchers	Store assistants	Transportation services personnel	Housekeeping personnel	Legal & compliance advisors	

Note: 1. Roles where fluid workforce are used the most (dark green) to roles where they are utilized the least (red)

2. Job roles color-coded in black are indicative of high skilled roles offered to fluid workforce (specialists, professionals, experts, etc.) and job roles color-coded in blue are indicative of mid to low-skilled roles offered to fluid workforce (delivery executives, phone agents, etc.). This excludes individuals from outsourcing or consulting firms working with client organizations

Source: Capgemini Research Institute Fluid Workforce Research, December 2019, N=389 organizations using fluid workers in the last year.



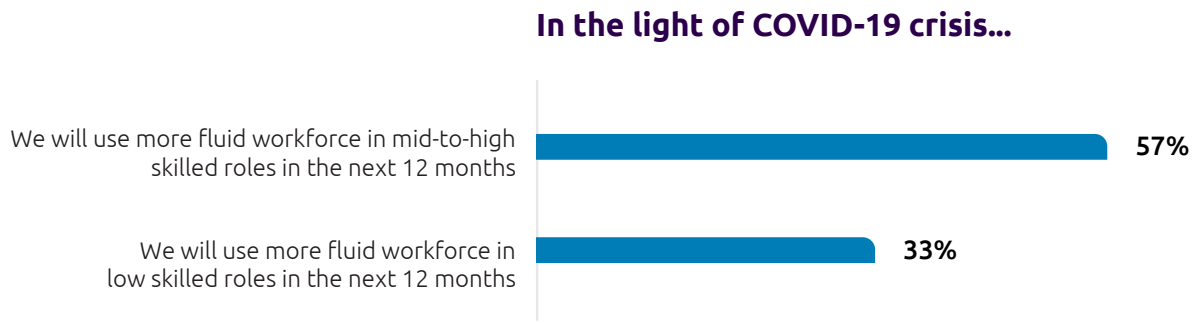
Organizations are also looking at fluid workforce to upskill the permanent employee base. Abraham Regan, head of recruitment at Federal Soft Systems says, *"The advantage with a fluid workforce is that they bring in skillsets not readily available with organization. You hire them for a particular requirement, and once that is completed, your permanent employees can learn from them, their skill-set and their experience."*

COVID-19 further drives the demand for mid-to-high skilled fluid workforce

Our research survey of 250 organizations in the month of May 2020 revealed that, 56% of the organizations who are planning to continue using or increase using fluid workforce in the next 12 months, will prefer to use them in mid-to-high skilled roles (see Figure 10). As previously indicated, they also plan to expand usage of fluid workforce beyond IT and finance and accounting functions to include a wider range.

As companies navigate through towards the new normal, they are likely to leverage the vast experience the fluid workforce brings in areas of digital transformation, cybersecurity and strategy and operations consulting. For instance, Flexing It, an India-based gig platform for freelance and project-based work for high-skilled roles, said that there was a 75% spike in the number of freelance positions published in April 2020. As per Chandrika Pasricha, CEO of Flexingit *"Our platform has seen a spike in demand for skilled independent consultants and freelancers, with top-tier strategy, technology and marketing skills most in demand."*[11]

Figure 10. Role preferences for fluid workforce



Examples of high skilled fluid roles includes consultants, analysts, data scientists, AI/ML experts, marketing strategists etc ; mid skilled fluid roles includes data entry operators, executive assistants etc.

Source: Capgemini Research Institute, Fluid Workforce in COVID-19 survey, May 2020, N=218 organizations who plan to use fluid workforce in the light of COVID-19 crisis

Even among the organizations who are already using fluid workforce and planning to increase them in the future, 57% of them prefer fluid workforce in the mid to high skilled roles and only 38% prefer them in low skilled roles.

Specifically, talking about low-skilled workforce, COVID-19 has brought in a range of challenges for them – ranging from safety concerns, to lack of benefits, health insurance or sick leave, to lay-offs due to low customer demand. Although some sectors like deliveries of essential goods are thriving – example Walmart has hired 150,000 temporary workers across its fulfillment centers, distribution centers and stores, and plans to hire 50,000 more , and newer partnership and shared talent models are emerging, for instance, Mc Donald's partnered with Aldi stores in Germany to redeploy many of its workforce in Aldi stores - these are exceptions rather than norm. Our survey with 250 executives in May 2020 reveals that only 33% of organizations planning to use fluid workforce in the next 12 months intend to hire low-skilled fluid workers. What can be the prioirties of organziations in this regard? We delve on this more in detail later in our report.

High-skilled fluid workforce favor roles that match their skills and offer flexibility; and they find a sense of purpose in fluid roles.

In our survey of 4,000 fluid workers, we surveyed around 78% fluid workers in high-skilled roles such as specialists, professionals, and experts, while 22% in mid- to low-skilled roles, such as delivery workers, factory workers, phone agents, or store assistants.

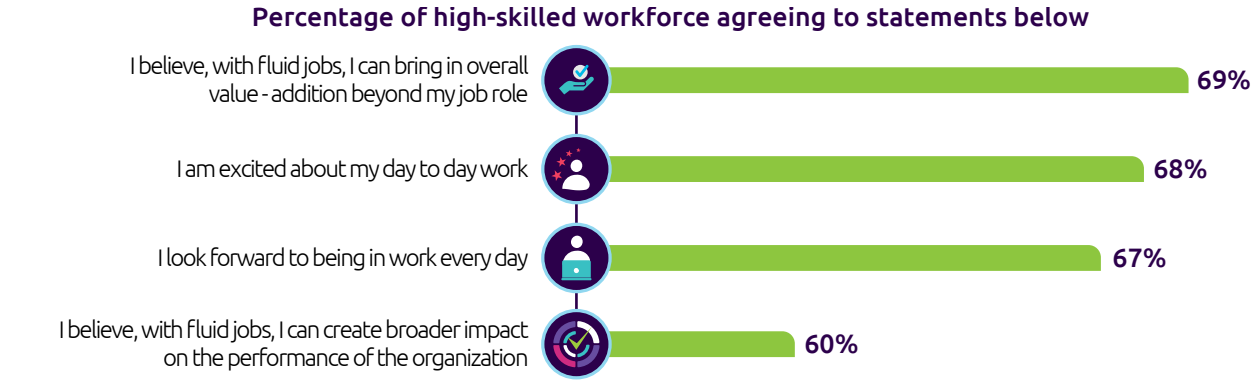
When asked about the reasons for preferring fluid work over permanent roles to high-skilled fluid workers, more than half ranked flexibility in timings or place of work among top three factors. (see Figure 11). The current COVID-19 crisis has further strengthened this demand for flexibility – with workforce now realizing remote and flexible working as an efficient way to balance work along with other commitments, while staying safe. As they see this arrangement working well, the question arises about the sheer need of going back to work the way it was before.

Figure 11. Top reasons for choosing a fluid job over permanent job

Source: Capgemini Research Institute Fluid Workforce Research, December 2019, N=2,044 full-time fluid workforce who have taken up high-skilled jobs

As figure 12 shows, about 70% of the high-skilled fluid workforce are excited about their day-to-day work and look forward to being in work every day. Likewise, 60% and above believe that they bring value-addition beyond their job roles and create a broader impact on the performance of the organization. Organizations agree, with 72% satisfied with the "self-motivation" levels of fluid workers. Bryan Campbell, Agile transformation coach at ExxonMobil, agrees that skilled fluid workers tend to feel empowered in their jobs: *"The fluid workforce looks at work differently. They want to find ways in which they deliver work quickly, add more value to the work, and change course more rapidly if something isn't working well. They have more opportunity to innovate and feel much more empowered."* This showcases that there is a huge opportunity for organizations to leverage from this highly motivated lot.

Figure 12. Extent of motivation and satisfaction: Fluid workforce performing high-skilled job roles



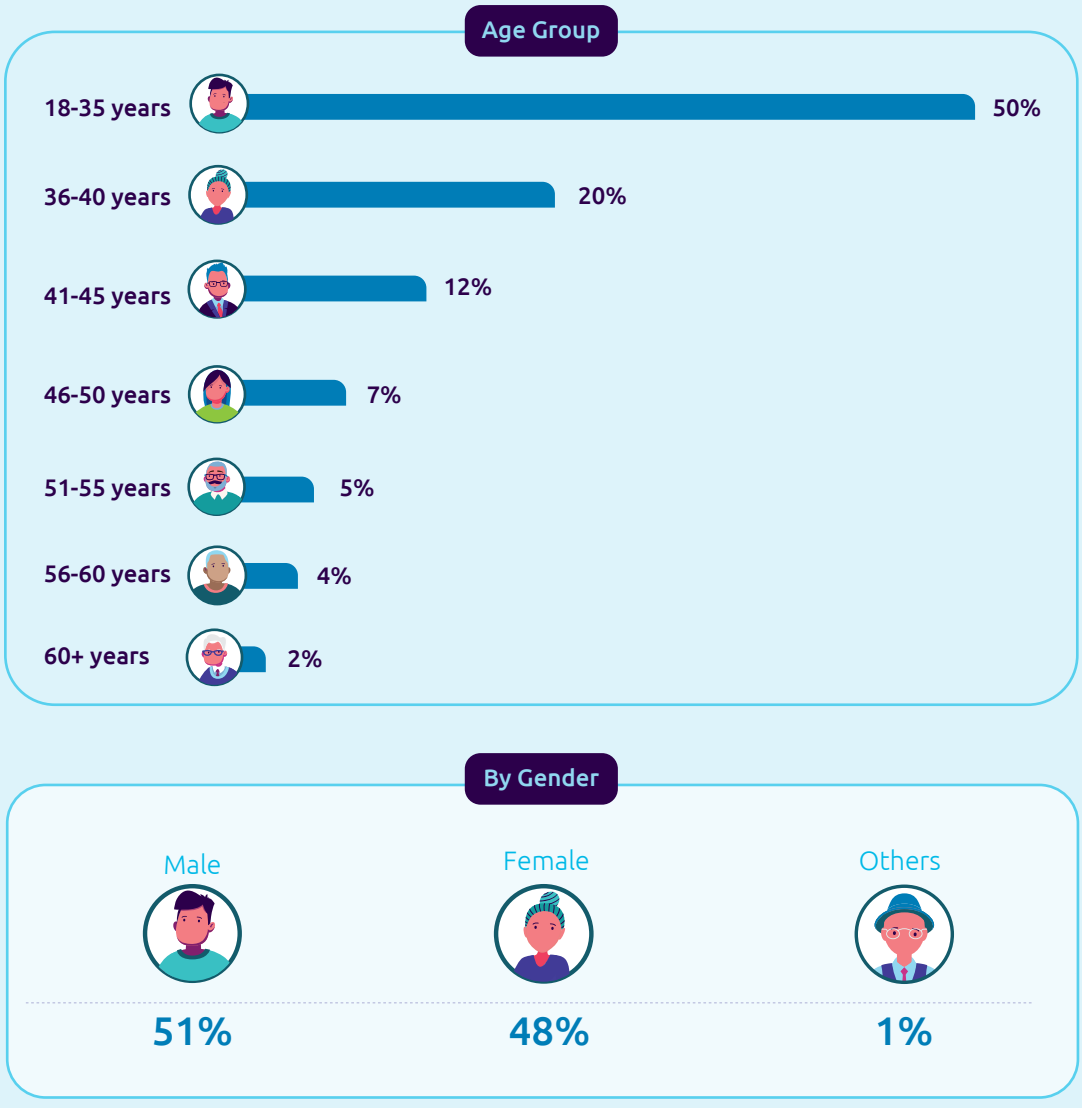
Source: Capgemini Research Institute Fluid Workforce Research, December 2019, N=3,139 fluid workforce who have taken up high-skilled jobs.

Who are these high-skilled fluid workers?

We found that 70% of fluid workers who took up high-skilled job roles are aged between 18 to 40. While flexibility is a key driver for the younger workforce to pursue fluid jobs, being a digital native and ease-of-access to different digital platforms is their key enabler.

The proportion of women to men in fluid roles is just about equal (48% to 51%) and close to half (48%) hold a degree at the postgraduate or doctoral/professional level
(see Figure 13).

Figure 13. High-skilled fluid workforce – demographics



By category

Full-time fluid workers

65%

Moonlighters

35%

By educational degree

Did not attend school/attended primary school **2%**

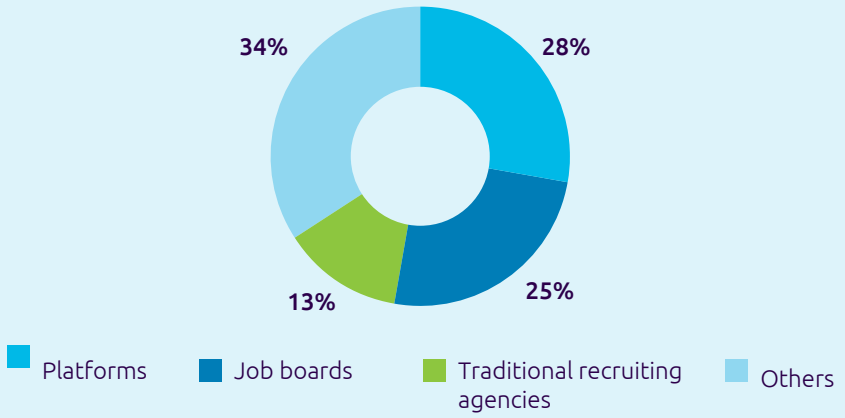
Undergraduate degree **33%**

High school/secondary school **16%**

Doctoral/professional degree **10%**

Postgraduate degree **38%**

How are they getting fluid jobs (top source used)



Source: Capgemini Research Institute Fluid Workforce Research, December 2019, N=3,139 fluid workforce who have taken up high-skilled jobs.

Organizations fail to provide an experience endearing to the fluid workforce

This research also finds out that currently crucial gaps exist throughout the fluid workforce lifecycle – from recruitment, onboarding, to learning, performance management and catering to sense of belongingness – and this does not match up with the experience they provide to permanent employees today. Moreover, the current COVID crisis showcases that these processes also have to be resilient enough. By not addressing these needs of fluid workforce, and by not making these processes resilient, organizations are missing out on serving an attractive proposition to this crucial talent market. Manisha Singh, Schneider Electric's Global Director, Digital HR, adds, *"Today, organizations are much more centred or designed towards catering to the needs of full-time employees rather than other segments. In the Future of Work context, organizations will need to engage with the fluid workforce - most probably for their higher value work - to innovate at the edge and at much higher frequency. But fluid workers will not come back and take on a second project with you if their first experience is poor. We need to think about the fluid workforce as our extended ecosystem and extended family. They are not with us all the time but will come in on a plug-and-play basis when we need them, even at short notice and for a short duration, because they like being with us."*

Organizations have concerns about data security and intellectual property, but they are not managing these concerns in collaboration with fluid workers

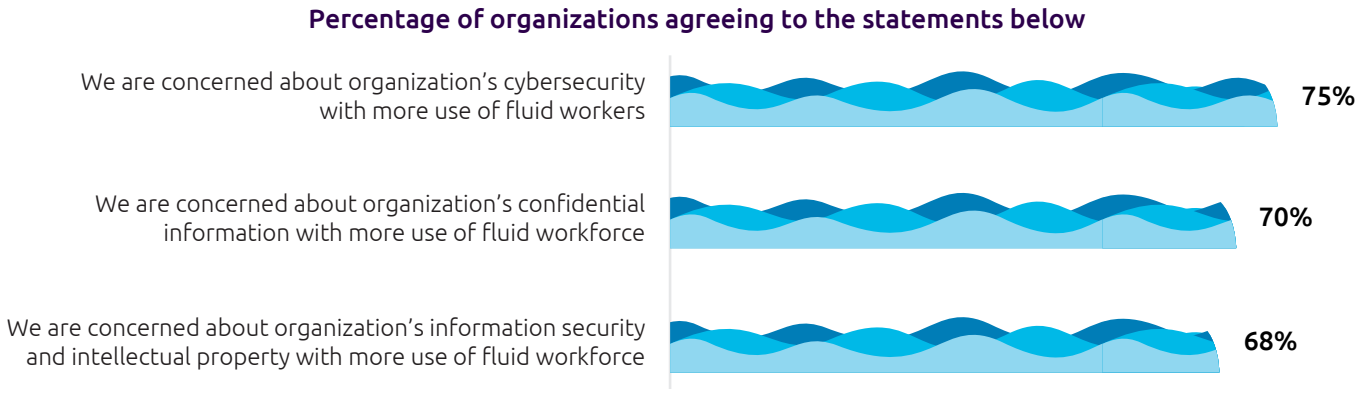
In our research with organizations using fluid workers, we found that 65% of the projects involving a fluid workforce have an element of remote delivery and more than 70% of the organizations are concerned that a fluid workforce poses a risk to information security. *"When data is shared externally, it opens up the possibility of it being compromised by hackers. Understanding these risks is the first step towards mitigating them,"* says Tess Smillie, vice president of human resources at Samsung UK.[14]

"Organizations are worried about intellectual property. If a fluid worker creates IP for them in the course of a project, how do they ensure that the IP belongs to them? These are important concerns that companies have today. However, the real question is, what are they doing about these concerns? Organizations must have a thoughtful approach to retain rights to IP without turning off the benefits and value which these fluid workers bring."

Erin Hicks,
Global HR operations and contingent workforce expert at Experfy

Beyond information security, organizations are also concerned about confidential information and the intellectual property that fluid workers create when working for a company (see Figure 16). Erin Hicks, Global HR operations and contingent workforce expert at Experfy, highlights the dilemma facing organizations today. She says, *"Organizations are worried about intellectual property. If a fluid worker creates IP for them in the course of a project, how do they ensure that the IP belongs to them? These are important concerns that companies have today. However, the real question is, what are they doing about these concerns? Organizations must have a thoughtful approach to retain rights to IP without turning off the benefits and value which these fluid workers bring."*

Figure 14. Organizational are concerned regarding data security and intellectual property

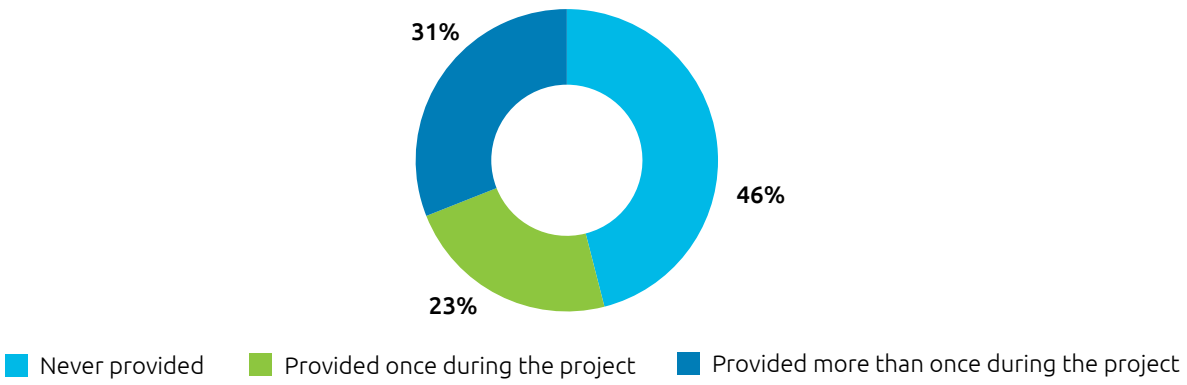


Source: Capgemini Research Institute Fluid Workforce Research, December 2019, N=389 organizations using fluid workers in the last year.

In today's crisis, where remote working has become the norm, data security and intellectual property have become critical questions that need to be addressed quickly. Running regular data and information security awareness programs for the entire workforce – permanent employees, subcontractors or fluid workforce – is a crucial first step.

However, our research suggests that many organizations currently lag in adequately sensitizing the fluid workforce on data and cyber security issues. Nearly half of fluid workers say that they have never received data or cyber security training from their client organizations (see Figure 15).

Figure 15. Cybersecurity training – A fluid workforce perspective



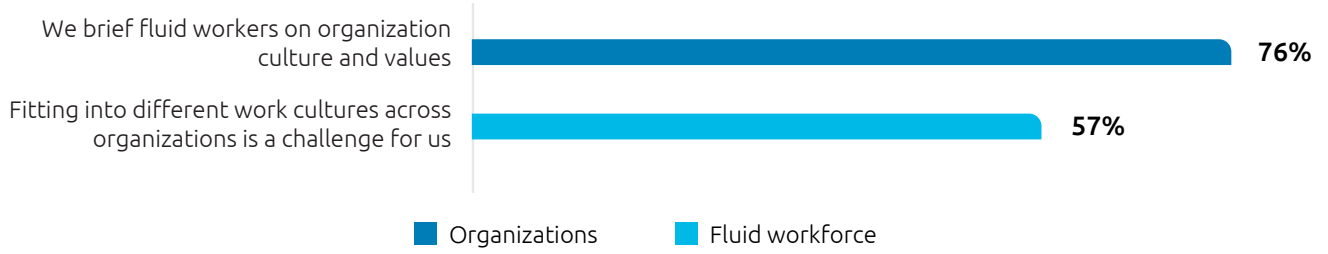
Source: Capgemini Research Institute Fluid Workforce Research, December 2019, N=4,000 fluid workers.

Just providing briefings about organizational culture and values is not enough – many fluid workers struggle to fit into the culture and feel left out

Organizations expect the fluid workforce to fit seamlessly into their work culture. Finding the right fit (by that we mean fluid workers who at least have the right attributes to integrate into a given organizational culture) is an essential first step. *"Fluid workers have to understand our culture. It is vital they integrate with the culture and with the type of people we have in our company as well as the results that we set and strive to go after"* says an executive from a global consumer products company.

In our research, more than three-quarters of organizations agree that they brief the fluid workforce on their organization's culture and values. Clearly, this is not enough, as close to 60% of the fluid workforce mention "difficulty in fitting into organizational work culture" when they take up fluid jobs (see Figure 16). Experfy's Erin Hicks confirms saying, *"I do not think organizations today are doing enough. They are keeping fluid workers at arm's length. They are not telling them about company culture, they are not giving them all the data security training that they necessarily need. Ultimately, this all is resulting in fluid workforce not getting integrated in teams."* Our research also confirms that more than half of the fluid workers find "not being considered as a part of a team" as challenging. This lack of inclusiveness adversely impacts the loyalty of fluid workers towards the organizations they engage with.

Figure 16. Organizations and fluid workforce's views on briefing on organizational culture and values



Source: Capgemini Research Institute Fluid Workforce Research, December 2019, N=4,000 fluid workers, N=389 organizations that used a fluid workforce in the last year.

Our research also suggests that there is a growing need for organizations to train their managers to effectively manage the fluid workforce. This becomes all the more prominent in the current COVID-19 crisis, where remote, distributed teams become the "new normal". Only 43% of fluid workers in our research say that any new ideas that they provide are encouraged by their managers and organizations. However, on the other hand, 68% of permanent employees feel they are encouraged to share ideas. Clearly, this reflects the mindset that organizations still consider the fluid workforce as a "different" workforce.

However, in today's environment, where the blended workforce is the new normal, discriminating between fluid workers and permanent employees will not be helpful. Organizations need to consider the workforce – permanent, fluid, or subcontractors – as a group of people working towards a shared goal and sharing the same values. As Telia's Nina Sundby tells us, *"First of all, I think that we need to stop talking about the fluid workforce as some sort of a separate population. They are our employees, and I think that we as employers need to cater to their needs for 'belongingness.' We need to have a more customized perspective – customized onboarding, offboarding, etc. In many organizations today, fluid workers come in, do their job and leave – with nobody having a clue why they left. We at Telia have started to think about how we can do preboarding, onboarding, and offboarding more effectively."*

In this context of culture, some of the questions that organizations should consider include: What are the culture-driven drivers that works for fluid workforce (ex., is it collaboration or employability or choosing projects of interest or social contract)? Are fluid workforce aligned on commonly accepted principles of the organization? Can a multi-form culture create a balanced ground for different forms of workforce?

Organizational process gaps exist throughout – from recruitment to offboarding

While our expert interviewees point to the importance of effective processes, from recruitment to offboarding, our research with organizations reveals that there are several areas where organizations do not have a highly robust approach in place.

Figure 17. Percentage of organizations with a highly developed approach for key processes (respondents who rate 6 or 7 (out of 7) to the following statements)

Source: Capgemini Research Institute Fluid Workforce Research, December 2019, N=389 organizations using fluid workers in the last year.

Recruitment

Only 34% of organizations feel strongly that their procurement policies for hiring fluid workers are quick and agile. Moreover, 57% of fluid workers feel that the job description provided by organizations during hiring is not clear. Abraham Regan, head of recruitment at Federal Soft Systems, highlights this as a common challenge when working with clients for filling specific roles with fluid workers. He says, *"We have seen a lot of miscommunication happening on what exactly is the job description when they try to hire fluid workers. The program manager will have some specific requirements, but the job description typically follows a completely different brief from the HR side."*

Onboarding and support

Only 32% of organizations feel strongly that they have a robust approach for systematic onboarding of fluid workers, and 59% of fluid workers feel that organizations do not have the right technology to automate their onboarding. Less than 40% of organizations agree that they have enough tools for fluid workers to do their work more effectively.

Learning and development

There are of course a few regulatory uncertainties regarding the classification of workers and the extent to which organizations can involve fluid workers in full-scale learning and development programs. However, our research shows that mindset is a bigger issue. An executive with a leading oil and gas corporation told us, *"We would not be looking at investing money on training or providing additional learning to fluid workers. Now, if that is a certification that is required as a mandate by our customers, then maybe the answer is yes. Otherwise, I do not think we would want to invest on their learning and development. They have got to do that themselves."*
Our survey also shows that only 43% of organizations have established some sort of L&D plan for their fluid workers. Establishing a mentoring and coaching plan for fluid workforce can be another area to look for.

Performance management

Only 34% of organizations feel that they have strong performance management processes in place for fluid workers. Some leading organizations are designing performance management to fit to the needs of fluid workers – using real-time performance management rather than the annual systems that are suited for full-time employees. Cisco, for example, has moved to weekly appraisals for its entire workforce. [15]

Offboarding:

Just over 40% organizations feel strongly that they have a well-laid out offboarding process for fluid workers or their HR teams keep in touch post exit. When we asked fluid workers about this issue, nearly 60% said that their client organizations did not gather their feedback once they completed their assignments.

The journey to the future of work: a roadmap to a blended workforce

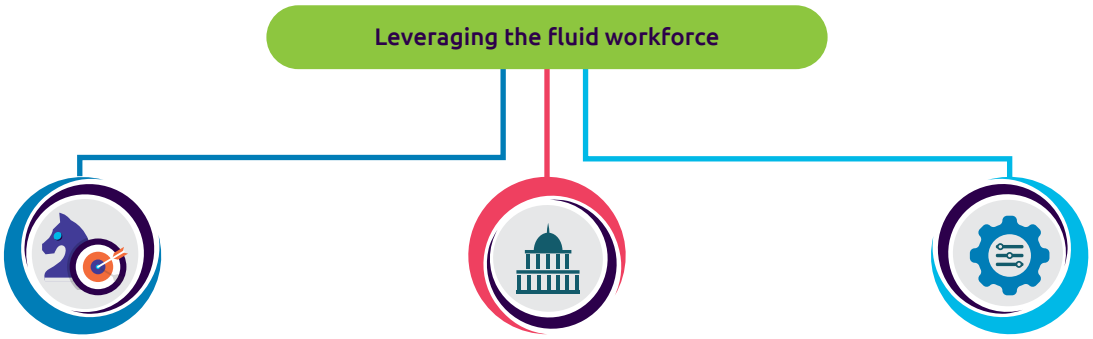
COVID-19 crisis has taken up the fluidity of workforce to a whole new level – with remote working being the new normal, and boundaries between permanent and fluid workers diminishing. It is now all the more crucial for organizations to realize that a blended workforce is not only a "nice to have" strategy – it is key for organizations to source in-demand critical skills to truly reap the benefits of agility and adaptability. And, as this blended workforce grows, it raises questions in front of organizations to think about the welfare and security of the workers in their ecosystem. As organizations also look to tap into the benefits of this blended workforce, understanding the learnings and best practices of high performers is critical intelligence. To understand the leading practices, we identified a high-performing group of organizations who are leading the way in this area. These front runners, which make up 20% of the overall sample of 500 companies, are organizations that are using fluid workers in variety of roles and are also generating significant benefits from their fluid approach.

Taking those front-runners, we examined what they do differently. Based on that analysis, we suggest three key recommendations for organizations looking to leverage the value of an integrated workforce (see Figure 18).

"We have seen a lot of miscommunication happening from client's end on what exactly is the job description when they try to hire fluid workers. The program manager will have some specific requirements, but the job description typically follows a completely different brief from the HR side."

Abraham Regan,
Head of recruitment at Federal Soft Systems

Figure 18. A roadmap to successfully leverage the blended workforce



DEVISE

Plan for an integrated talent strategy through people analytics and collaborating with business units

- Understand current skills landscape and future skills demand through people analytics and working with individual business units

GOVERN

Redefine the operating model with a dedicated fluid talent management role and a cohesive approach with functions

- HR to act as a trusted advisor for senior management in fluid workforce planning
- Create a fluid talent management role
- Ensure effective collaboration between HR, procurement and finance functions
- Simplify the tools landscape

ADAPT

Build robust processes and culture to support the growth of fluid workforce

- Build strong recruitment and onboarding systems to familiarize fluid workers with your organization and its culture
- Provide a comprehensive briefing on data security and deploy agreements and systems to hedge the data-risk
- Devise micro, on the go training modules for the fluid workforce
- Equip managers to effectively manage a hybrid workforce

Source: Capgemini Research Institute

"The fluid workforce looks at work differently. They want to find ways in which they deliver work quickly, add more value to the work, and change course more rapidly if something isn't working well. They have more opportunity to innovate and feel much more empowered."

Bryan Campbell,
Agile Transformation Coach at ExxonMobil

1. Devise: Plan for an integrated talent strategy through people analytics and collaborating with business units

Although nearly 4 in 5 organizations use fluid workers today, many do not have an integrated talent strategy. Having a clear strategy for hiring and retaining fluid talent, aligning the fluid workforce with the overall business-growth plan, and communicating the role of fluid talent in future workforce is crucial for organizations to be prepared for the changing future of work. This also means moving away from typical job descriptions and focusing on tasks, outcomes and skills.

It is important for organizations to look at the current workforce – understand their current skills and competencies – and then map the future skill set required through a skill-gap analysis with individual business units. Leveraging people analytics is key here. Zoe Harte, head of human resources and talent innovation at Upwork, says, *"Analytics enables organizations to slice and dice their workforce data to uncover critical issues, conduct skills gap analysis, and customize their approach to working with different groups of the workforce such as freelancers, full-time, temp, and agency workers. Just as finance tracks ROI and operations measures productivity, HR can measure and influence human-related value such as turnover and engagement."*[16]

In this environment, HR also has to take up a role of a talent broker – managing relationships with fluid workforce staffing platforms, using AI-based tools for dynamic resource matching, enabling skill-based staffing, allocating work on demand and responding to changing business needs in real time.

2. Govern: Redefine the operating model with a dedicated fluid talent management role and a cohesive approach with functions

Historically, the talent management and scenario planning practices of HR in various organizations were mainly considered from the permanent employees' perspective and not from the perspective of the total workforce. Today, as well, different functions often take a siloed approach to fluid workforce hiring and retention. Currently, in many organizations, procurement functions or core functions hire fluid workers directly with minimal involvement from HR.

Our research shows that successful organizations have adopted a new operating model, with redesigned policies, processes and practices. Nearly 90% of the frontrunners in our research have started by establishing a clear process for managing and developing the fluid workforce. As these leading organizations embed a fluid workforce into the fabric of the organization, the best practices that emerge include:

- **HR to act as a trusted advisor for senior management in fluid workforce planning:** Laura Goodrich, workforce transformation expert and thought leader, agrees that HR needs to transform its role from a support function to an advisor for senior management. *"When you ask about HR, fluid workforce is a unique opportunity for HR to shift out of their functional expert role and move into the role of being a trusted advisor to the senior leaders of their organization. And the first thing that they need to do is to deeply and intimately understand the priorities of the senior leaders."*

- **Create a fluid talent management role:** Samsung has a "head of on-demand talent" role, responsible for recruiting a fluid workforce from platforms in accordance with Samsung's sourcing policies.[17] At Rio Tinto, the chief learning or talent officer within HR function is responsible for building and nurturing the fluid talent network.[10] Our research suggests that the fluid talent manager should:

  – Liaise with internal functions to optimize the planning, onboarding and use of fluid talent.
  – Build a proactive relationship with external digital platforms and fluid communities.
  – Promote organization's brand and value proposition to attract fluid talent.

Nitin Sethi, global IT director, business transformation & engagement at Visteon, also sees HR gaining prominence as organizations increasingly engage with fluid workforce:

"Today, the recruitment of a fluid workforce is a very localized function between the project managers and procurement organization. HR's role – to a certain extent – is just to act as a facilitator. However, I personally feel that once we see the volumes increasing in the future, we may see a separate dedicated HR function to handle fluid workers"

- **Ensure effective collaboration between HR, procurement and finance functions:** It is imperative for HR to look at the fluid workforce through a holistic lens. This means breaking down any silos that stand between them and functions like procurement and finance. Equally important is defining the roles and responsibilities according to the competencies of each function– for instance, the budgeting expertise from finance and employee engagement and recruitment expertise from HR. To take advantage of the blended workforce, CHROs, CFOs and CPOs must partner for:

"Today, organizations are much more centred or designed towards catering to the needs of full-time employees rather than other segments. In the Future of Work context, organizations will need to engage with the fluid workforce - most probably for their higher value work - to innovate at the edge and at much higher frequency. But fluid workers will not come back and take on a second project with you if their first experience is poor. We need to think about the fluid workforce as our extended ecosystem and extended family. They are not with us all the time but will come in on a plug-and-play basis when we need them, even at short notice and for a short duration, because they like being with us."

Manisha Singh,
Global Director, Digital HR, Schneider Electric

– Strategic workforce planning to get the right integrated talent at the right budget
– Developing a forward-looking approach to manage human and financial capital
– Setting the right KPIs to measure the success that very well go beyond the traditional financial metrics

At a large insurance provider, Group HR liaises closely with its Group Procurement colleagues, and sets standards and approaches at a Group level. This then leads to individual business units also following and mirroring that collaborative approach. Head of extended workforce at a large insurance provider, says: *"At a Group level, we are trying to provide benchmarks so that we are more efficient about the fluid workforce, but the strategy itself has to be defined at entity level, because we are not a top-down group. So, at global level, we focus on a close cooperation between group procurement and group HR to work on the sourcing mix and the trends."*

- **Simplify the tools landscape:** Supporting technology suites enables businesses to find, attract, and engage talent. However, in many organizations today, siloes exists. This is where HR manages the permanent workforce and procurement manages the fluid. As they often use different tools, it causes a lot of redundancies. Stephane Kasriel, former CEO, Upwork, says, *"The same resume would be in two totally different databases because they [a fluid worker] would have engaged with the company once as a contractor and once as a fulltime employee. This cannot be a good experience for anybody – neither the worker nor the company. But the reality of it is because the buyers are different within the company."* A similar siloed situation also often exists in how the different groups use outsourcing. HR tends to engage with RPO (recruitment process outsourcing), but procurement deals with MSP (managed services providers). Stephane Kasriel adds, *"The idea behind total workforce management is you merge MSP and RPO, you merge HRMS (human resource management systems) and VMS (vendor management system) and you merge services procurement with HR, and all of that becomes a single place where human beings that need to interact with a company are being managed."*

"When you ask about HR, fluid workforce is a unique opportunity for HR to shift out of their functional expert role and move into the role of being a trusted advisor to the senior leaders of their organization. And the first thing that they need to do is to deeply and intimately understand the priorities of the senior leaders."

Laura Goodrich,
Workforce transformation expert and thought

An interview with Stephane Kasriel, former CEO of Upwork

Stephane Kasriel is a tech entrepreneur, former CEO at Upwork Inc and a co-chair of the World Economic Forum Council on the Future of Education, Gender and Work. He is an expert on future workforce trends, from the growth of flexible workforces to how companies should evolve and change the way they build teams. Stephane holds an MBA from INSEAD, Master's from Stanford in Computer Science and a BS from Ecole Polytechnique in France.

Q: Over the last few years, an increasing number of companies are focusing on the fluid workforce. In your opinion, what is fueling this trend?

There are two different sides – demand and supply. On the demand side, companies increasingly use a freelance workforce. This is partly because they must and partly because people want to be freelancers. So, companies that are always looking for highly skilled talent are being pulled into this by the supply. It is also driven by a stronger need for flexibility – shareholders are increasingly demanding that companies be more nimble, agile, cost effective, and move faster. In this agile environment, organizations are realizing that they are missing certain skills, or they don't have enough resources with certain skills, so being able to hire people on demand makes a ton of sense. The second reason on the demand side is the fact that technology keeps on accelerating and, as a result, skills are becoming obsolete faster than ever before. So, as work becomes more specialized, it is less and less likely that organizations will have all the skills that they need internally.

On the supply side, if you ask people whether they truly want the constraints of a fulltime job or whether they want to have more flexibility in life, increasingly people are saying "I would rather have more flexibility." In America, the millennial generation and the gen Z are twice as likely to be freelancers than the baby boomers. The baby boomers – who weren't freelancers – are retiring. Therefore, the younger generation are becoming the main generation in the workforce and about 50% of them have done some amount of freelancing in the last year. So, the number of freelancers is growing faster than the overall workforce.

Q: What are the drivers for fluid workforce to take up fluid opportunities?

It can include people for whom the act of physically going to an office is complicated and who prefer fluid jobs. This could be because of physical health issues or mental health issues like depression or PTSD in military veterans, or people who are somewhere on the autism spectrum, who have high IQ, but emotionally struggle in an office.

Another reason is care duty. So, people who have young children at home and can't commit to a full-time job, people who have elderly parents that they need to take care of, or people who have a spouse that they need to take care of. These people prefer fluid jobs.

Another key reason is geography. It is very clear in the US – and to some extent other countries as well – that dual-income families will increasingly struggle because one of the two spouses gets relocated regularly and the other one struggles to continue to have a traditional job. Finding a new job every time they move from one city to another is difficult. And, increasingly, the places where jobs are being destroyed by automation are not the same as the places where new jobs are being created. So, there

is a huge geographic mismatch between where jobs are being created and where people live.

So, what has been fueling this is that people are saying "I can't take a fulltime job – the best thing I can do is to have one of those freelance jobs that can be done from home."

Q: In terms of regulations on fluid workers, do you think there is a need for a new social contract?

If you are a full-time employee of a company, you get free or highly discounted healthcare coverage. But if you are a freelancer – and you try to buy your own healthcare insurance products – it is very expensive, because you don't have any negotiation power. So, for the same amount of income, the cost of healthcare for a freelancer is much higher and, therefore, their net income after paying for benefits is much lower. Fundamentally, it needs to be made sure that, for freelancers, benefits are affordable. This is whether they pay for it themselves and buy it from the government, union, or some kind of collective bargaining or co-op type of system; whether they buy it from their clients; or whether it is provided by platform such as Upwork. What happens if you are disabled, what happens if you are sick, what happens if you die, what happens if you want to go on vacation, what happens if you lose your source of income? All these issues that fulltime employees have are also true for freelancers. And, as the number of freelancers grows, this becomes a big issue for the society and government.

Also, training the independent fluid workforce is highly problematic today in most countries. In many cases, the worker would like the training, the company might want to give the training because it's economically in their interest. However, you can't do that, because that reclassifies the worker as being permanently employed.

That's the work we are trying to do with the World Economic Forum. So, this idea of the new social contract is to say that a lot of these employment laws were created in late 19th century, but the world has changed a lot – both on the supply side and the demand side. The basic needs of humans – to stay relevant, to feel protected, to be able to go on vacation – remain important. Therefore, as more and more of the workforce is freelancing, we need to create a social contract that is not tied to employment and allows companies to be more empowered to have different dealings with fluid workers.

Q: Finally, what are the key steps that the organizations need to take as they start to design a hybrid talent strategy for themselves?

The first point is don't resist a change – embrace the change. The companies that embrace the change will thrive and the companies that resist the change will fail. Therefore, the number-one thing that the CFO, the head of HR, the head of procurement and the CEO need to agree on is that they are going to be embracing the change.

So, the second question is – how? And I would say the first thing is don't try to go big, because you are going to fail. Identify change agents in small pockets of your organization, who are excited about the change, and have them do it on a small scale. Have them document what it took, the learning and, more importantly, the impact they felt in organizing the work in the new way, and the benefits they are getting from it.

And then, the third one is to get help and realize that you are not alone, and not the only company that has had to go through this. There are tons of consultants out there that can help you change how you organize your workforce and there are software solutions that can help you manage the workforce in a different way. You don't have to reinvent the wheel. It is not nearly as complicated as you think it is and it is also not something that you have to invent from scratch. There are tons of companies that do this at such scale today.

3. Adapt: Build robust processes and culture to support the growth of fluid workforce

Build strong recruitment and onboarding systems to familiarize fluid workers with your organization and its culture

With multiple options open to an organization, hiring a fluid worker has become easy. But what is challenging for them is to hire the right worker. This calls for new and innovative and recruitment process and efforts to get the right candidate on board:

- Organizations should be very clear in explaining and outlining their expectations from the fluid worker. Our research suggests that 77% of the front runners agree that they provide a very clear task/skill description when hiring fluid workers, as compared to 42% of others. However, only providing a clear task description is not enough. It will also be valuable to understand why the fluid workers want the assignment, from the financial rewards to the flexibility it offers.
- Along with the traditional ways of evaluating a candidate – which includes candidates' availability, skill sets, and degrees, hiring managers should think outside the box to find the best fit for the role. One way could be to include newly hired and senior employees in the hiring process. This will allow the fluid worker to see the company through different perspectives and get a better understanding of the organization's culture.
- Showcasing openness to diversity and inclusion in the workplace is also important to attract fluid workforce, which is already so diverse and wants organizations to mirror the same values they believe in. Moreover, having the fluid workforce boosts the workplace diversity, as the fluid talent is globally distributed, from different backgrounds, covers a wider range of age groups and is gender diverse. An HR manager from a financial services firm says, *"One of the key drivers for organizations to look for a fluid workforce is that they want to promote a very diverse workforce. A workforce that comes from different regions, different backgrounds, speaks different languages, has different views on the market, etc. The benefits of this diverse workforce are huge."*
- If the role for which the fluid worker is being hired is a critical one, it would benefit by having him/her shadow an existing employee for a day or two. Involving the potential hire into the daily operations can help in ensuring a good fit.
- Hiring managers can also go a step ahead and proactively explain the benefits and perks they can offer to the fluid worker. Our research highlights that 74% of the front-runner organizations do so, vis-à-vis only 26% others. Another way is to get dedicated talent acquisition specialists to explore, assess, and experiment with the digital and offline platforms to find the right fit.

Once recruited, there should be an onboarding process to integrate fluid workers into the mainstream workforce. A digital onboarding process, which requires the fluid worker to fill in documents and provide proof points for background verification. The pandemic has pushed many companies to adopt digital onboarding of new employees which should be extended for the fluid workforce as well. Similarly, the investments into a digital workplace and remote working kick started by the crisis are a good basis to bring the talent experience of fluid and normal workers closer together.

This feeds through to the managerial contact, at which point processes and policies should be communicated clearly, given that fluid workers have different needs and expectations, such as working from remote locations. An executive from global consumer products company emphasizes how fluid workers need to be properly armed to succeed in their role, from being clear on their objectives to having the right connections in the business: *"Firstly, we need to introduce them to our key stakeholders and help them understand the business in relation to what they're coming in to deliver. And secondly, making sure that they've got the right connections, such as access to subject matter experts. Given the expertise that they bring, I think the more we can make sure that they are included and involved in the decision-making process, the higher value impact they're going to make for us as a business."*

Provide a comprehensive briefing on data security and deploy agreements and systems to manage any data risk

- Front runners provide comprehensive onboarding for fluid workers, which include data and information security training and periodical refresher programs. It is particularly important to explain legal, compliance and intellectual property rules to ensure there is no breach in data security and privacy. Our research shows that 82% of front runners provide cybersecurity training to their fluid workers, while this drops to 43% in other organizations.
- Our research suggests that operating on a "need-to-know" basis has also worked well for many organizations. Having documented and comprehensive agreements in place is crucial. Lokesh Kariappa, director of workforce planning and talent acquisition at McDermott International adds, *"Fluid workers tend bring their own devices. However, we do not give them full access to all our systems. For example, we do not give them access to our salesforce or internal finance related systems. However, the data we do share with them is also covered under a confidentiality agreement."*
- Many organizations usually install security or device management software for the devices of permanent employees, but rarely do the same for fluid workforce. Enforcing security and privacy for fluid workers at a device level is key. One approach would be to do this through VPN or through other solutions to encrypt the device's data traffic. In the era of BYOD, identity management and establishing strong authentication controls are key.

Devise micro and 'on-the-go' training modules for fluid workers

Owing to the nature of fluid workers – and the fact that they often are hired for a very specific skill set – it is difficult to justify fully-fledged, large-scale training and development modules. Secondly, there are regulatory restrictions regarding L&D and the classification of workers. Keeping these in mind, organizations need to build a strategy for expanding their training capabilities, examining how traditional learning and development (L&D) teams that are focused on full-time employees can play a role. Our research suggests that 80% of the frontrunners have established an overall L&D plan for fluid workers as compared to just 26% all other organizations. Few of the leading practices emerge:

- Providing several micro-learning modules that a fluid worker can access on the job:-
  - The modules also need to be dynamic so that it can be scaled to deliver to any number of fluid workers, and for varying topics such as data and privacy, organization culture, workflow, and so on.
  - An added benefit could be to personalize these training materials to the language and culture of different segments of the fluid workforce.
  - As most fluid workers are rarely present physically at work, these learning programs need to be accessed anytime, anywhere, on any device.
- There is also an opportunity for organizations to engage in coaching and mentoring with fluid workers to reflect on

"As far as performance is concerned, when the person completes their assignment or task, it is really important for the managers to have a discussion with them on how they felt. This is about looking at it as a bi-directional conversation - to see how we felt and how they felt. We then fill in the ratings, give them suggestions if there are any, takes notes, and save everything in our system."

Lokesh Kariappa,
Director of workforce planning and talent acquisition at McDermott International

their current skills and future skillset required. As a further step, organizations can use AI and machine learning-based training modules, which will be able suggest the right and relevant training for a fluid worker. These sorts of initiatives will also result in better engagement and satisfaction.

- For the L&D teams, it is imperative to ensure that special attention is paid to learning that helps integrate fluid and permanent workers. While organizations need to orient fluid workers into the organization and its processes, their culture should promote trust and collaboration for permanent employees to engage effectively with fluid workforce. An industry expert adds, *"Learning experiences can be a great opportunity for team building, networking, and inclusion. So, I think that an organization would be very short-sighted to exclude the freelance workers from L&D, because that's a unique opportunity for connection and, a unique opportunity for relationship building."*

Reinvention of the role of managers to effectively manage a hybrid workforce in the current context

Fluid workforce presents a diverse and a shifting talent pool. Managers who are accustomed to managing a permanent pool of resources with annual goals will also be responsible for setting up diverse talent pools and achieving task-based goals. The role of managers gains even more prominence especially as organizations are embracing remote working amid COVID-19. This can be sometimes difficult and complex for managers. Equipping managers with a right mix of project and people management techniques along with promoting an overarching collaborative culture is imperative to highlight the value proposition to the fluid workforce. Key areas of managerial role evolvement include:

- **Working with managers to promote a culture of autonomy and collaboration in the teams:** Our previous research on agile organizations suggest that the high-performing organizations (those we called the 'Agile frontrunners') provide teams with autonomy, purpose, a mission, and work towards minimizing constraints.[11] This is also very applicable to managing the fluid workforce. Managers should be able to provide fluid workers with as much autonomy and freedom as possible, and not tie them down with unnecessary protocols and processes. A truly collaborative environment – one that promotes responsibility and visibility across permanent and fluid worker – delivers better results. To foster this approach, managers should try to make the fluid workers feel like a part of the company, and not make all conversations solely "transactional" in nature. Involving fluid workers in forums such as meetings and team lunches can help here.
- **Training managers on handling diverse teams:** As the role of manager evolves to manage fluid workforce, they should also be trained on handling diverse teams and to mentor fluid workers. In addition to this, the HR teams should be available to help and assist the managers, and step-in should any problems arise. Stephane Kasriel says, *"The Head of HR should recognize that somewhere between 10 and 30% of their workforce at any point in time will be these non-traditional workforces. And, that the managers in their organization that are engaging with those workforces are not trained at all on how to engage with them, how to retain them, and how to get them excited about the company - even if there are limitations on how much they can include them".*
- **Engaging with managers to set up a continuous performance management process for fluid workforce:** Apart from managing, it is also necessary to recognize the work and efforts of the fluid workers and provide them with constructive feedback. Whenever possible, the managers should work with HR to customize the performance review process and arrange for performance review sessions. Seeking feedback from the fluid workers is equally important. This can happen via face-to-face discussion, or by administering online surveys to understand their opinions, needs and expectations. Our research shows that 76% of frontrunners actively collect feedback from fluid workforce they engaged with; however, this percentage is just 36% in all other organizations. Ley Wilson, supplier and vendor management lead at Travelex, says, *"You cannot work without a feedback system for fluid workers. If you don't have feedback from both sides of the table, you will get nowhere. It is a must to have monthly feedback and 360-degree feedback as well, because you want to hear what they think of your company. I look to have feedback on both sides of the table to understand things like how the project is going, is there any slippages, are there any movement in dates, is there any extensions required, is the project fit for delivery".* Lokesh Kariappa, Director of workforce planning and talent acquisition at McDermott International, echoes this sentiment. *"As far as performance is concerned, when the person completes their assignment or task, it is really important for the managers to have a discussion with them on how they felt," he explains. "This is about looking at it as a bi-directional conversation - to see how we felt and how they felt. We then fill in the ratings, give them suggestions if there are any, takes notes, and save everything in our system."*

Fluid workforce and the need for a social contract

Even before the COVID-19 crisis, the world of work was changing fast. With remote working being the dominant way of work today, work is no longer a "place" where we go; instead it is what we "do." Our survey with 250 senior executives in May 2020 shows that 63% of the executives agree that the shifts caused by COVID-19 crisis has blurred the boundaries between fluid and permanent workforce.

However, today's anxiety and disruption has brought a few fundamental challenges for the fluid workforce into the spotlight – the lack of social benefits and job security, disparity in digital skills between high-skilled and low-skilled workforce, and a lack of sense of belonging, recognition and purpose.

In these times, where there are rising calls for a organizations to form a new social contract with their permanent employees – focusing on security, health and safety; it becomes equally crucial to take a fresh look at the **new employer promise for fluid workforce.**

Several questions emerge about how the future could evolve:

Q: Will organizations address the critical issues of health and wellness and social benefits for fluid workers?

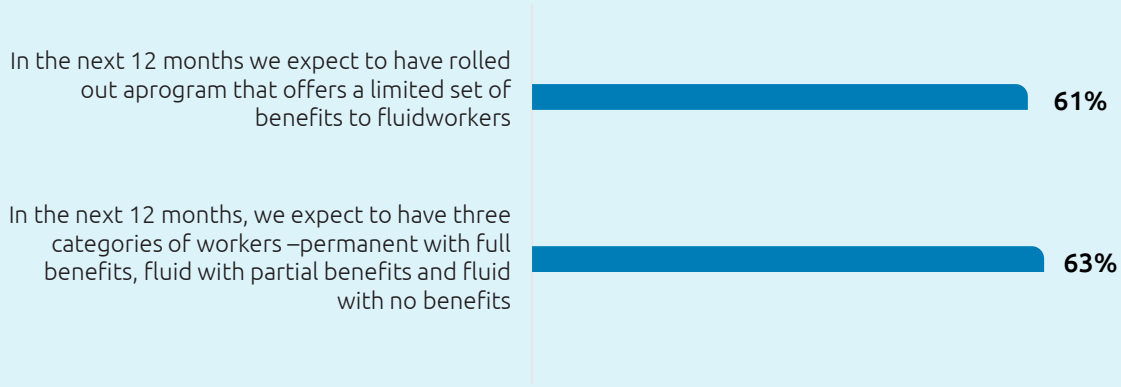
Our pre-COVID research found that close to half (49%) of fluid workers feel that not receiving social security and other benefits (such as healthcare) is challenging. Before the pandemic outbreak itself, discussions had started whether benefits or social security arrangements have to be similar for fluid workers and employees. Few organizations had taken a lead – for instance, Survey Monkey, an online survey software tool company, provided staff benefits to its contract workers including health insurance, time off and transportation.

The COVID crisis again shows the importance of these discussions. For instance, in this era of remote working, we see a number of organizations discussing on benefits from an ergonomic set-up of the home office and some are even reimbursing to permanent employees for their home office furniture. How should some of these health and wellness or financial benefits can be extended to fluid workforce? What will be the emerging role of regulators, governments, talent brokers and organizations in this is something to ponder.

In the time of crisis, we see a few organizations stepping up for fluid workforce. Unilever has promised to protect its workforce – covering employees, contractors, and others who it manages or who work on its sites, on a full-or part-time basis for up to three months. Weem, a France-based talent platform, announced it was offering credit aid and more engagement opportunities for fluid workers. Likewise, Uber India announced the roll out of insurance policies and financial assistance for its associated workforce.

Our additional research with 250 executives in the COVID times reveals that 61% of executives believe that they will be thinking about rolling a program that offers a limited set of benefits to fluid workers in the next 12 months. Additionally, 63% executives expect new categories of workforce to emerge (see Figure 19)

Figure 19. Social Contract for fluid workers – Executives views in the COVID times



Source: Capgemini Research Institute, Fluid Workforce in COVID-19 survey, May 2020, N=252 organizations.

The situation in the post-crisis "new normal" may also see different models emerging. Laura Goodrich, workforce transformation expert and thought leader, explains, *"I think we will see insurance companies putting together packages that are very much designed for the freelance community in a much more favorable way. And, I imagine that governments will also step in to fill those gaps that exist."*

Q. Will employability be the new security? Will new organizations and talent brokers emerge to support fluid workers in their journey to employability?

In the age of digital innovation and disruption with skills and skill-requirements quickly changing – traditional notions of job stability do not apply.

The COVID pandemic has only added to this disruption and accelerated the need to redefine the very future of work. Especially, for low-skilled fluid workers, the ongoing pandemic has created a divide between high-skilled and low-skilled – between those who are digitally savvy for a virtual work environment and those who are not. An HR leader from a leading firm energy and utilities organization told us, *"If we talk about fluid workers with leading digital skills today – definitely the boundaries between permanent employees and those fluid workers are going away. But, to be honest, for gig workers – especially those without critical digital skills are suffering. Today, organizations are looking at whether the fluid worker is super critical to their success, and if so, then there has been no discrimination in the way they have been managed. But adversity has taken away a bit of pragmatic view and created distinctions across the board and I would say that the gig economy has suffered a lot."*

So, in this scenario who will make sure that these different types of fluid workers are able to live and work in a "new normal"?

In this case, will 'employability' be the new security (in other words, focusing on being employable in the long term rather than staying employed in your current role). To be employable, fluid workforce must continuously develop your skills, qualifications, and experiences. Today, the onus of employability is on fluid workers themselves. As the future evolves, will employers also share this onus? Will they support them with learning, re-skilling opportunities, and assistance in career transitions?

Will talent brokers work closely with organizations and fluid workforce on learning, career development? How will technology support individuals to find their career paths and to ensure their employability?

In the age of digital innovation and disruption with skills and skill-requirements quickly changing – traditional notions of job stability do not apply.

Q: In an era where the boundaries between professional and personal life are merging, how will organizations cater to the fluid worker's need for belonging, recognition and purpose in their job?

In times, where remote working is the new norm even for permanent workforce, and boundaries between "home" and "office" are blurring – what will organizations do to align the culture? How will they motivate permanent employees and fluid workforce? Does it mean organizations to look at a multi-form culture?

How will they ensure putting "trust" as the core value between managers, permanent employees and fluid workforce? This requires a reinvention of managers role, capabilities as well as behaviors. Will managers be able to lead virtually, keeping the communication open and teams connected?

Will organizations be able to close the "purpose gap" – the gap between stated objectives and their lived behaviors? Will they be able to identify the core social vision to be embodied by the themselves and to be shared with their ecosystem? Will they be able to live upto expectations of this blended workforce to be engaged and to contribute to organization's purpose?

Conclusion

The demand for specialist skills is growing, and traditional recruiting techniques are not keeping pace with the speed of change. In the 'new normal', the fluid workforce will become increasingly relevant and high-performing organizations will shift their fluid strategy from a cost-efficiency play to a source of competitive advantage. However, making a success of this strategic shift will require significant change.

'Fluid' not only highlights a fluidity of contract, it also reflects a fluidity of location. And this will translate into changes in recruitment, onboarding, talent management, and retention strategies as well. A new virtual operating model, and building a culture where permanent and fluid workers feel equally valued and can collaborate as a blended team will be key.

This paradigm shift will also call for a fresh look at a new 'social contract' between organizations and the fluid workforce, and to find a balance between two key goals – cost savings and adaptability for the organizations, and benefits and flexibility for the fluid workforce. At the same time, it will become necessary to think about the kind of regulations required to achieve this objective and engage with regulatory authorities accordingly. This will set us on the path towards a new era of people management and guide us to the future of work.

Appendix 1

Organizations using a fluid workforce over the past year– by country and sector

Our analysis highlights that the India and the US are leading the way in fluid-workforce adoption at a country level, and public sector and banking at a sector level.

Figure 20. Organizations using a fluid workforce over the last 12 months – by country

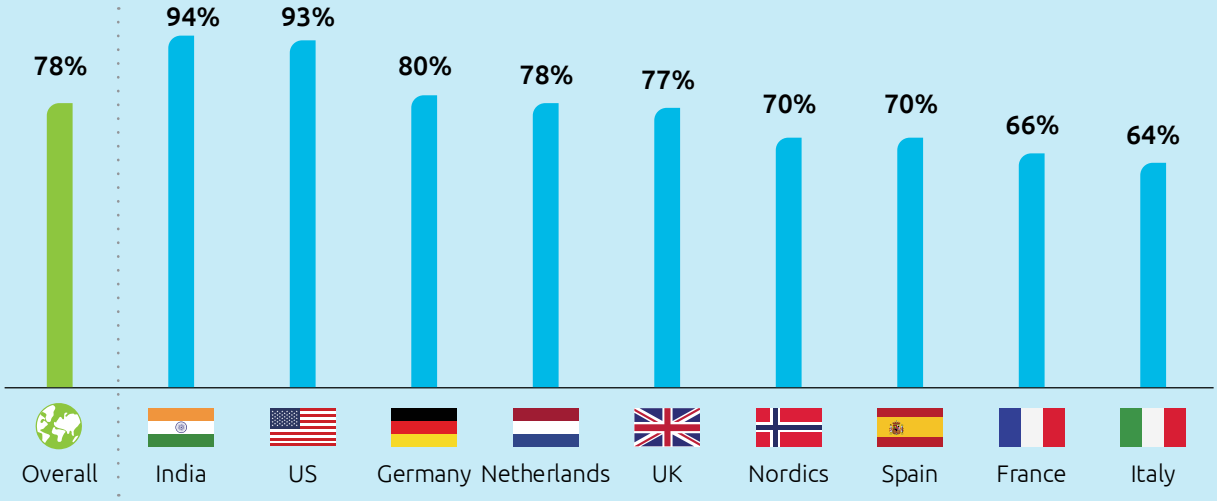
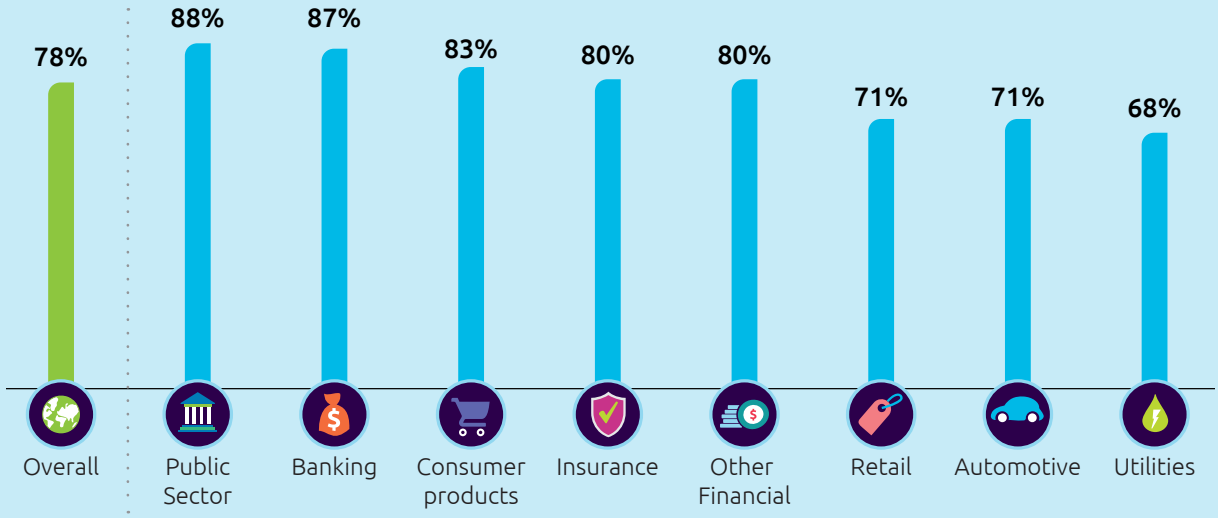


Figure 21. Organizations using a fluid workforce over the past year– by sector



Source: Capgemini Research Institute Fluid Workforce Research, December 2019, N=500 organizations.

Appendix 2

In large organizations, the demand for fluid workers will increase by nearly 40% in the next one year

Figure 22. Estimation of fluid workforce for skilled roles in next 12 months (estimated for six* sectors)

Current state of fluid workforce	A	B	C	D	E	F	G	H	I
	No. of organizations above $500M revenue (in 2019)	% of organizations using a fluid workforce in the last one year	Total no. of user companies (2019)	Total no. of non-user companies (2019)	Average no. of permanent employees in companies >$500M revenue	Total no. of permanent employees in user companies (in millions)	% of fluid workers as a % of total employees	Total workforce in user companies (in millions)	Current no. of fluid workforce in the user companies (in millions)
	Benchmark data	*Survey Data*	*(B*A)*	*(A-C)*	*Benchmark data*	*((C*E)/ 1000000)*	*Survey Data*	*(F/(1-G))*	*(H-F)*
Six primary sectors*	22,840	78%	17,815	5,025	25,963	462.5	10.9%	519.2	56.7

Forecasted state of fluid workforce	J	K	L	M	N	O	P	Q	R
	Expected increase in fluid workforce in user companies in next 1 year	Total no. of fluid workforce in user companies in next 1 year (in millions)	% of Non-User organizations planning to use fluid workforce in next 1 year	No. of non-user companies planning to use fluid workforce in next 1 year	Total workforce in current non-user companies planning to utilize fluid workforce in next 1 year (in millions)	Expected increase in workforce attributed to fluid workforce in next 1 year	Total no. of fluid workers in non user organizations in next 1 year (in millions)	Total no. of fluid workers in next 1 year	Expected % increase in fluid workforce (from 2019)
	Survey data	*(I*(1+J))*	*Survey data*	*(L*D)*	*((M*E) /1000000)*	*Survey data*	*(O*N)*	*(P+K)*	*((Q-I)/I)*
Six primary sectors*	18.3%	67.1	78%	3,899	101.2	12.40%	12.6	79.6	40%

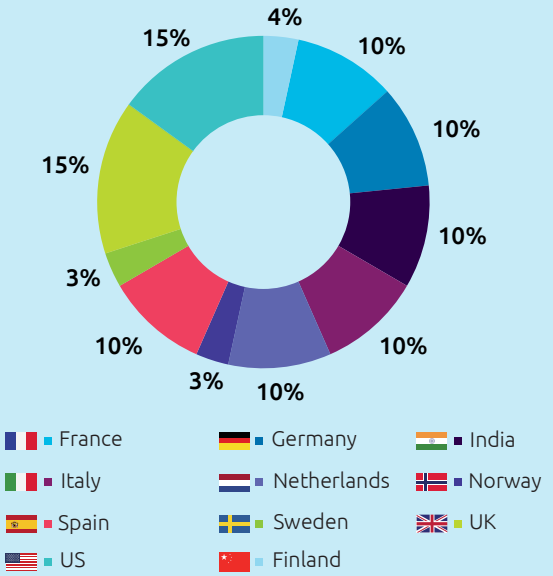
Note: *Six primary sectors include automotive, retail, consumer products goods, financial services (including banking, insurance and other financial services), utilities, and the public sector.
Source: Capgemini Research Institute Fluid Workforce Research, December 2019, N=500 organizations; Capgemini Research Institute, Fluid Workforce in COVID-19 survey, May 2020, N=252 organizations; Hoovers; MarketLine advantage.

Appendix 3

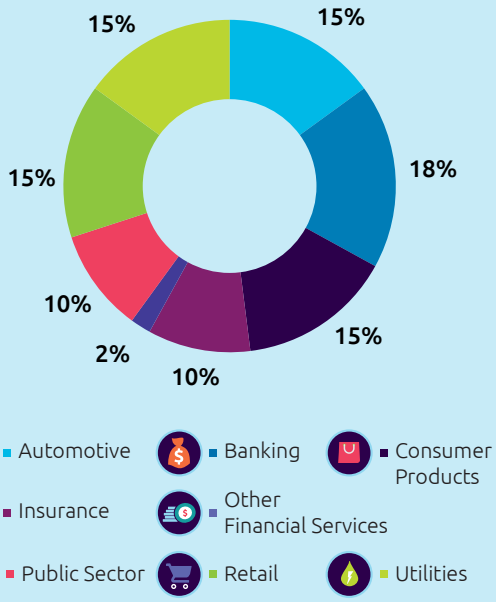
Research methodology

In December 2019, we surveyed 500 business leaders from organizations with greater than $500 million revenue in FY 2019 across a range of sectors and countries. We also surveyed more than 5,000 workers – 4,000 fluid workers and nearly 1,000 permanent employees. This workforce was working on a variety of high-skilled and low-skilled roles across functions, sectors, and geographies.

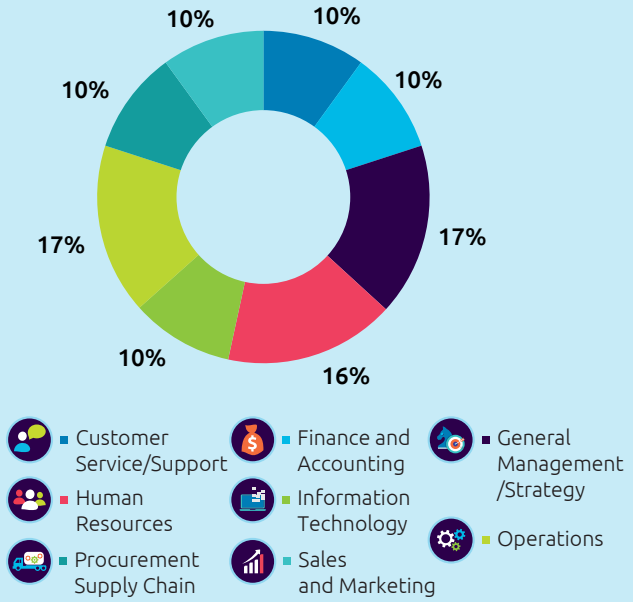
Organizations by country



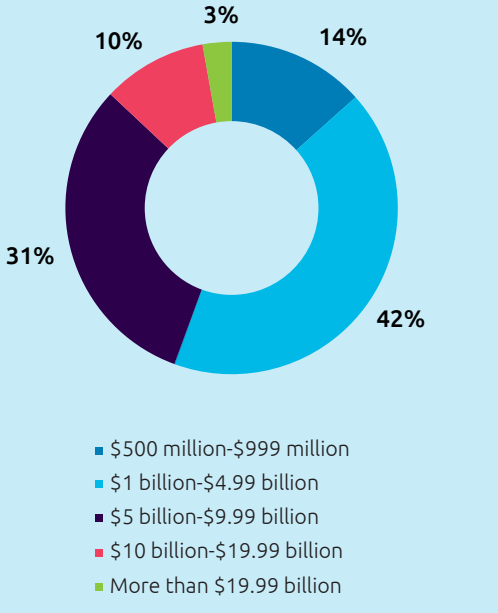
Organizations by sub-sector



Executives by function

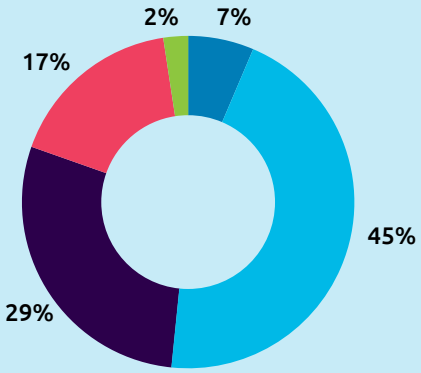


Organizations by revenue



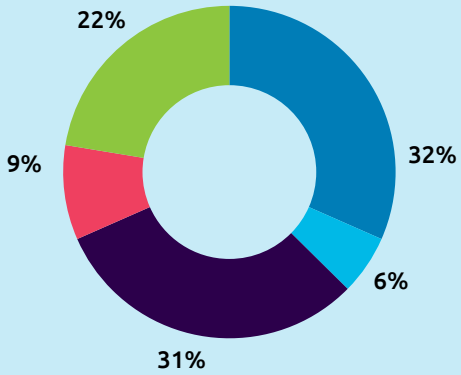
Research methodology

Organizations by employee-size



- 10000-50000 employees
- 1000-5000 employees
- 5000-10000 employees
- 500-1000 employees
- More than 50000 employees

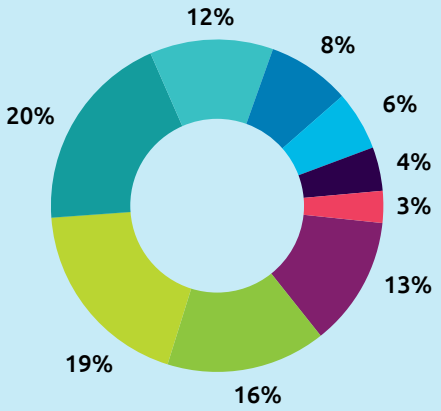
Executives by designation



- Director
- Executive (c-suite)
- Senior Director
- Senior Vice President
- Vice President

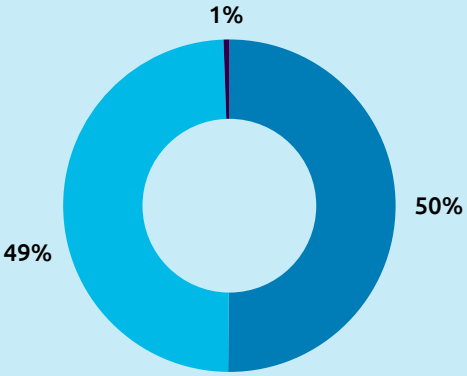
Source: Capgemini Research Institute Fluid Workforce Research, December 2019, N=500 organizations.

Workforce by age



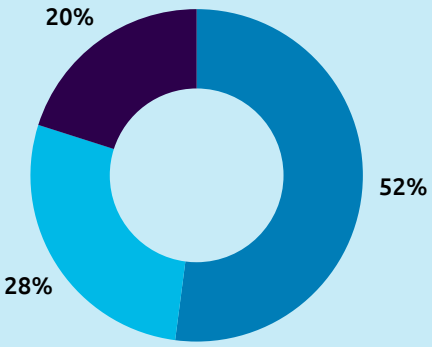
- 46-50 years
- 26-30 years
- 51-55 years
- 31-35 years
- 56-60 years
- 36-40 years
- 60+ years
- 41-45 years
- 18-25 years

Workforce by gender



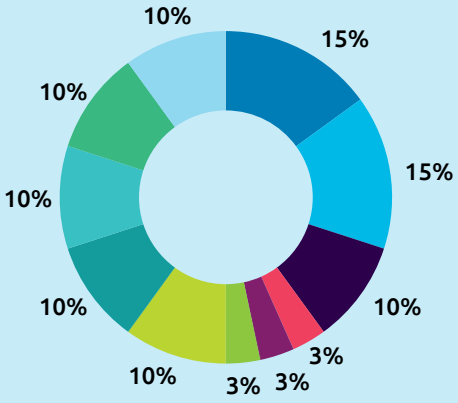
- Male
- Female
- Others

Workforce by current work status



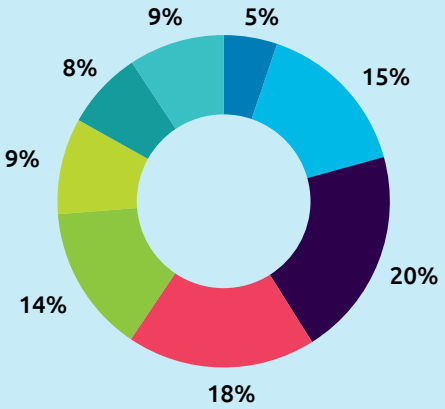
- Workforce with full-time fluid jobs
- Workforce with part-time fluid jobs
- Workforce with permanent jobs

Workforce by country of residence



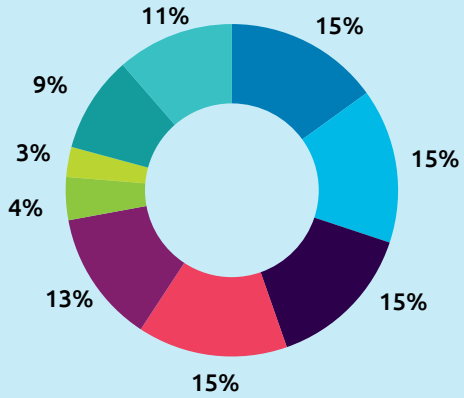
- US
- UK
- France
- Sweden
- Finland
- Norway
- India
- Germany
- Italy
- Spain
- Netherlands

Workforce by pre-tax household income



- Less than $20,000
- $20,000-$39,999
- $40,000-$59,999
- $60,000-$79,999
- $80,000-$99,999
- $100,000-$119,999
- $120,000-$139,999
- $140,000 or more

Workforce by the sectors their jobs were attached to

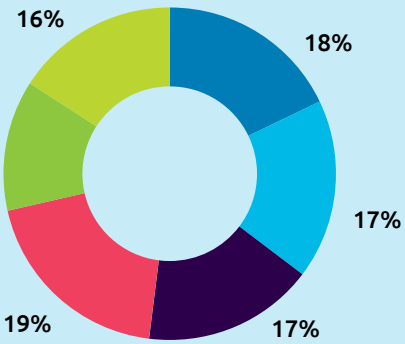


- Consumer Products Goods
- Retail
- Utilities
- Automotive
- Utilities
- Banking
- Insurance
- Other Financial Services
- Public Sector

Source: Capgemini Research Institute Fluid Workforce Research, December 2019, N=5,000 workforce.

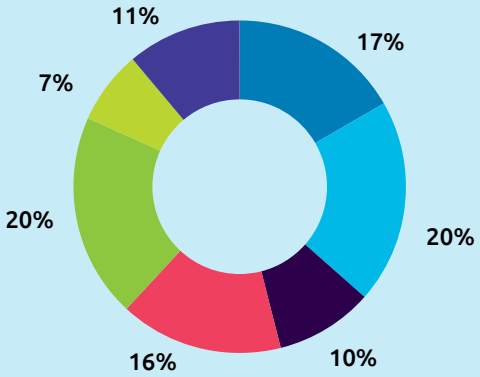
We further supplemented the executive survey in the month of May 2020 to understand the impact of COVID-19 on fluid workforce. For the same, we surveyed 250 executives from different sectors

Organizations by country



- Spain
- France
- Germany
- UK
- India
- US

Organizations by sector



- Other Financial Services
- Utilities
- Insurance
- Retail
- Banking
- Consumer Products Goods
- Automotive

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Make your workforce your competitive advantage by partnering with Capgemini!

We are convinced that business performance is intrinsically linked people performance. Various theories and 25 years of (HR) transformation experience point out three ingredients for talent productivity delivering business strategies: Competencies, commitment and contribution. What does this mean for organizations in their digital transformations moving towards large scale adaptive ecosystems with fluid workers?

- **Competencies are the new source of competitive advantage.** Skill requirements are changing faster than ever and the battle for the best talent is on. To successfully drive digital transformation, organizations need to take on the challenge of attracting, developing and retaining scarce talent. And at the end, tech, data and smart workforce strategies will decide who will win the war of talents.
- **Top talents want meaning and purpose.** Today's talents are attracted by a specific mission and purpose which needs to be reflected and anchored in organizations' workforce strategies and value propositions. Not getting employees' commitment means losing the impact of their competence. Therefore, it requires leaders being able to communicate the purpose and to increase the overall value proposition by providing guidance and coaching to the workforce. Working in ecosystem organizations demands them to translate the purpose to and involve both, permanent and fluid workers.
- **Organizations need talents contributing to the firm and their personal development.** Growing complexity in terms of different worker generations, individuals' preferences and contract forms, require rethinking employee experience design. We believe in flipping it upside down and in enabling the workforce to drive their own experience and development according to their needs and preferences. Part of it will be transferring the responsibility of continuous learning and managing own careers to individuals.

How Capgemini can help you maximizing benefits of a fluid workforce while keeping your talent productivity high?

An unproductive workforce can be costly. And no access to required skills can cost your business! Here is what Capgemini can do for you:

Develop a workforce plan and talent strategy

We help clients to align their business and workforce strategy. Considering the technological impact of their strategy on job roles and skill requirements, we help them to define a smart workforce/talent strategy leveraging permanent and fluid workers.

Enable leaders for managing diverse workforces

We empower leaders to manage a diverse and fluid workforce and build trust across organizational borders.

Truly accelerate new roles for HR

We enable HR departments to incorporate the idea of "organi-zations as an ecosystem" into the HR strategy and design their operating model respectively. We upskill them for their new role as workforce architects.

Design a holistic talent experience

We support organizations in designing and implementing a holistic talent experience for both, permanent and fluid workers.

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Claudia is an expert in the people perspective of digital, automation and AI. She collaborates and support clients in how leadership in the digital age is evolving, how workforce and organizations transform through automation and AI, how the HR function is composed and how to engage with employees during the process. Her project expertise lies in the rollout of large transformation programs in an international context.

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The Capgemini Research Institute is Capgemini's in-house think tank on all things digital. The Institute publishes research on the impact of digital technologies on large traditional businesses. The team draws on the worldwide network of Capgemini experts and works closely with academic and technology partners. The Institute has dedicated research centers in India, the United Kingdom, and the United States. It was recently ranked Top 1 in the world for the quality of its research by independent analysts. Visit us at *https://www.capgemini.com/researchinstitute/*

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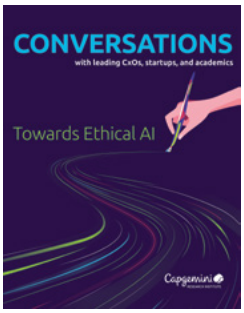

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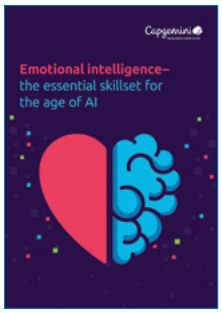

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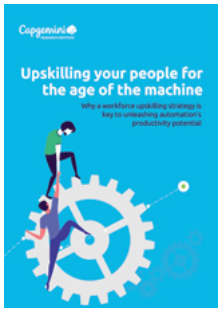

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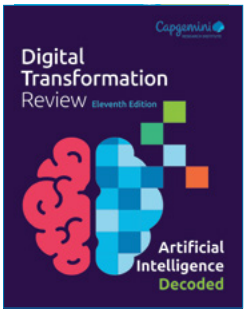
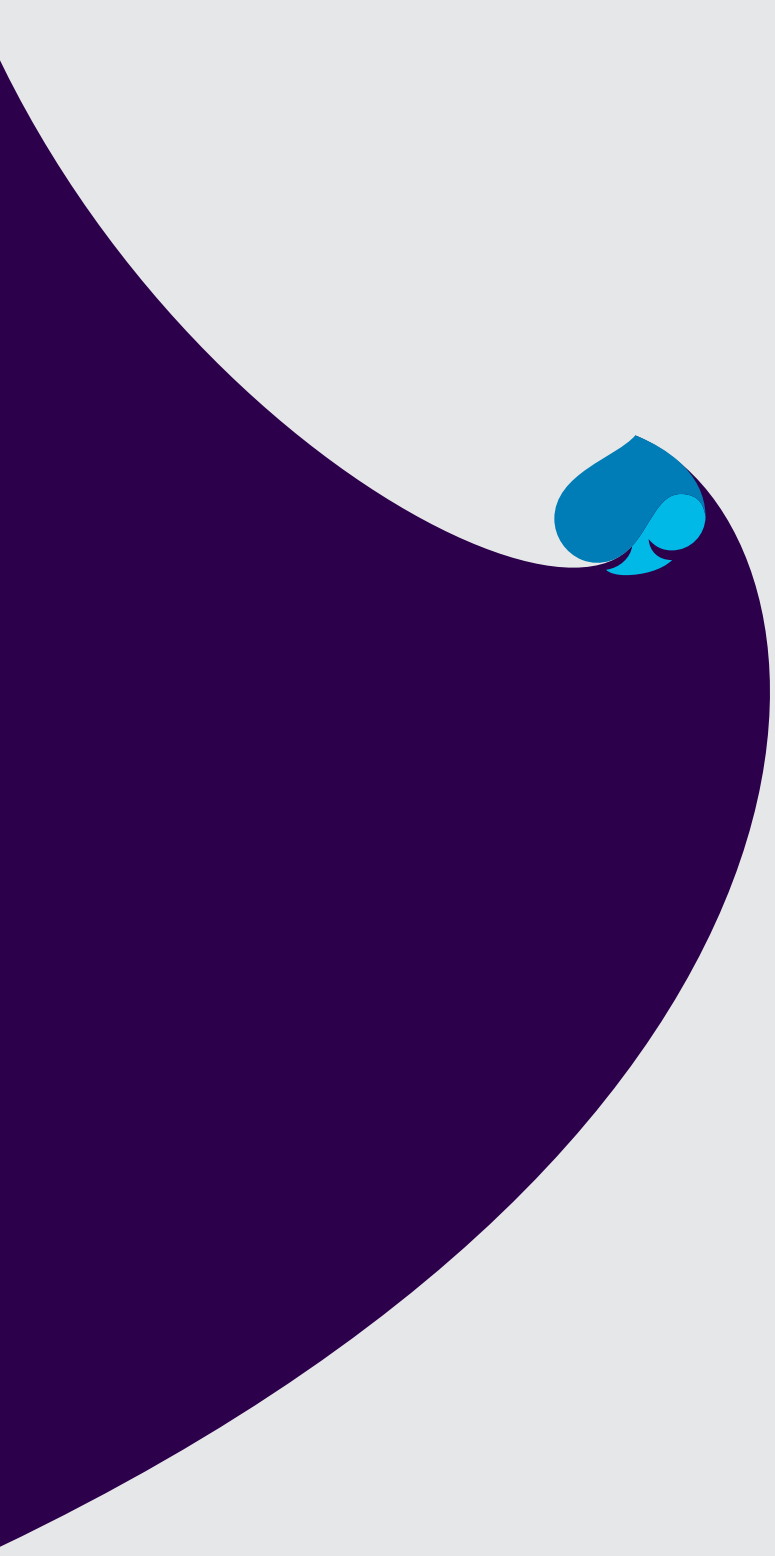


Digital Transformation Review 11: Artificial Intelligence Decoded



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A global leader in consulting, technology services and digital transformation, Capgemini is at the forefront of innovation to address the entire breadth of clients' opportunities in the evolving world of cloud, digital and platforms. Building on its strong 50-year heritage and deep industry-specific expertise, Capgemini enables organizations to realize their business ambitions through an array of services from strategy to operations. Capgemini is driven by the conviction that the business value of technology comes from and through people. It is a multicultural company of almost 220,000 team members in more than 40 countries. The Group reported 2019 global revenues of EUR 14.1 billion.

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