

THE FUTURE OF WORK

TAKING INNOVATION, COLLABORATION, AND INTERACTIVITY TO THE NEXT LEVEL

The Future of Work is not just about automation and technology upgrades, but a holistic strategy that aims to leverage digital technologies, attitudes, and behaviors to reinvent the way businesses engage with their employees, partners, and customers to deliver superior experiences that result in sustained competitive advantage.

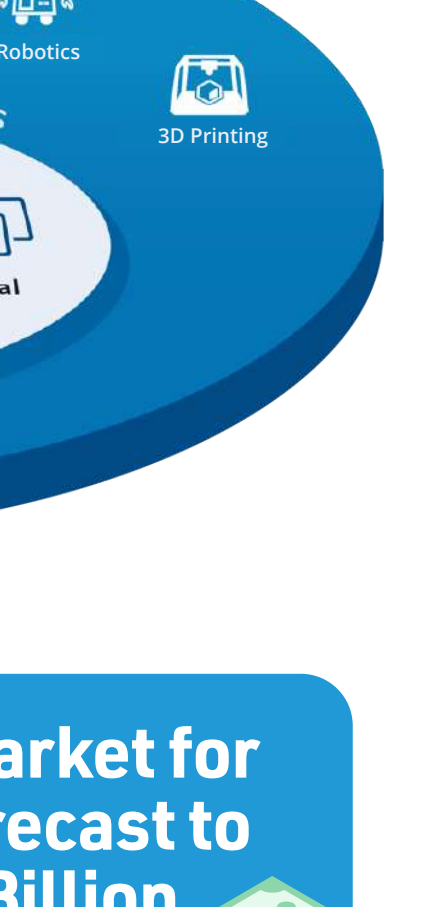
PARADIGM SHIFTS ARE HAPPENING

Digitalization Goes Mainstream

Digitalization is no longer a choice, but a necessity.



At least **60%** of the Asia/Pacific GDP will be digitalized over the next three years with growth in every industry driven by digitally-enhanced offerings, operations, and relationships.



At the core of the digital economy are 3rd Platform technologies which enable businesses to accelerate their digital transformation (DX) journey.



Asia/Pacific is the largest market for Innovation Accelerators, forecast to reach more than US\$600 Billion by 2020

Millennials Take Center Stage in the Workforce



By 2020, more than **50%** of the workforce in Asia/Pacific will be Millennials



The growing mix of millennials in the workforce and hyper competition is forcing organizations to explore new sources for competitive advantage, which is fueling DX and the adoption of 3rd Platform and Innovation Accelerator technologies such as AR/VR, AI, 3D printing, IoT, and Robotics. This trend will not only help drive the evolution of innovative products and services, but also new business models and experiences.

THE RISE OF NATURALLY INTERACTIVE COMPUTING

By 2020, human-digital interfaces will diversify:



30% of consumer-facing A1000 will use **biometric sensors** to personalize experiences.

Nearly 30% of new mobile apps will use **voice** as a primary interface.

20% of field service technicians and over 20% of information workers will use **AR**.

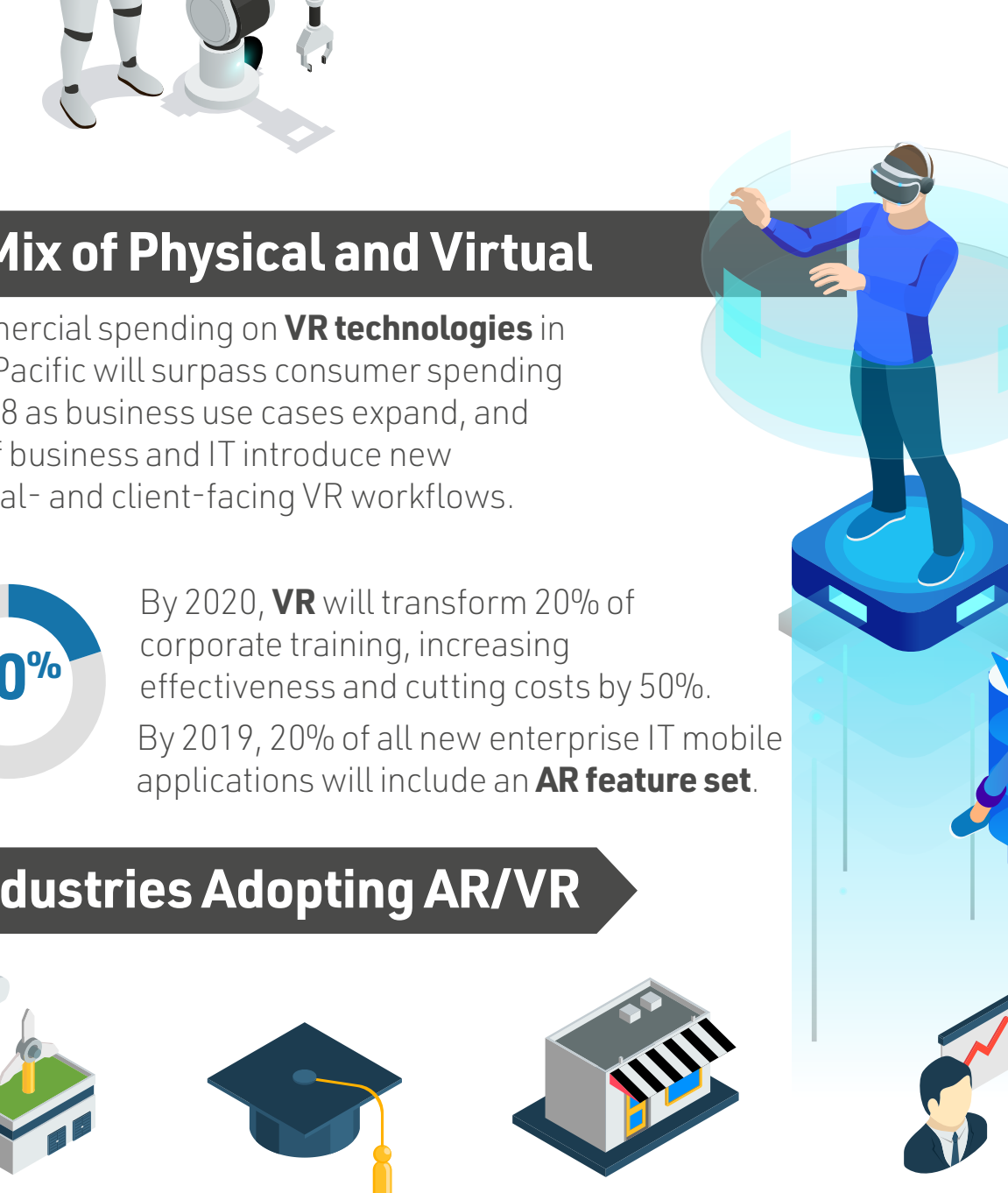
By 2021, over 50% of consumers will interact with **customer support bots** and 75% of commercial apps will use **AI**.

WORK ITSELF IS CHANGING AND EMERGING TECHNOLOGIES ARE CREATING NEW JOBS THAT COULD NOT EVEN HAVE BEEN IMAGINED BEFORE



SO, WHAT DOES THE FUTURE OF WORK ENTAIL?

The **Workculture of the Future** will be even more borderless, collaborative, and innovation focused, with culture as the defining character that enterprises will utilize to compete in the digital era.



The **Workspace of the Future** will increasingly be a mix of physical and virtual spaces. These spaces will comprise flexible configurations, modern designs, and naturally interactive technologies to meet the needs of the digital era, and to suit the taste of millennials – all while ensuring security and compliance.

The **Workforce of the Future** will intelligently be distributed with intelligent machines and humans working together. Emerging technologies will augment human capabilities delivering automation, and new products and services that can only be imagined today.

THE FUTURE WORKFORCE: AI IS AUGMENTING HUMAN CAPABILITIES



THE FUTURE WORKSPACE IS...

Increasingly Mobile and as a Service



Over 80% of the enterprises in Asia/Pacific have already deployed some form of **mobility solutions** and 88% of these plan to spend either the same or more on mobility over the next 12-18 months.

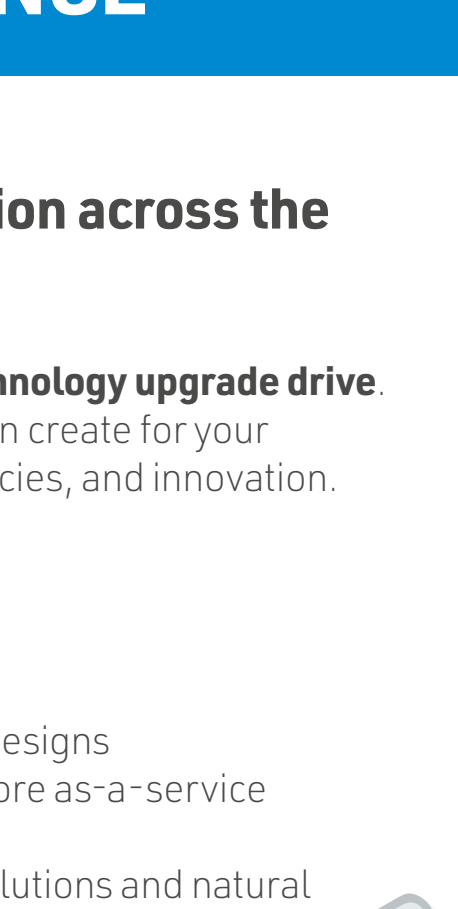
By 2020, 67% of all enterprise IT infrastructure and software spending will be for **cloud-based offerings**.

By 2019, 20% of A1000 companies will have a **device-as-a-service (DaaS)** agreement in place, and 1% will have completely transitioned to DaaS.

A Mix of Physical and Virtual

Commercial spending on **VR technologies** in Asia/Pacific will surpass consumer spending in 2018 as business use cases expand, and line of business and IT introduce new internal- and client-facing VR workflows.

By 2020, **VR** will transform 20% of corporate training, increasing effectiveness and cutting costs by 50%. By 2019, 20% of all new enterprise IT mobile applications will include an **AR feature set**.

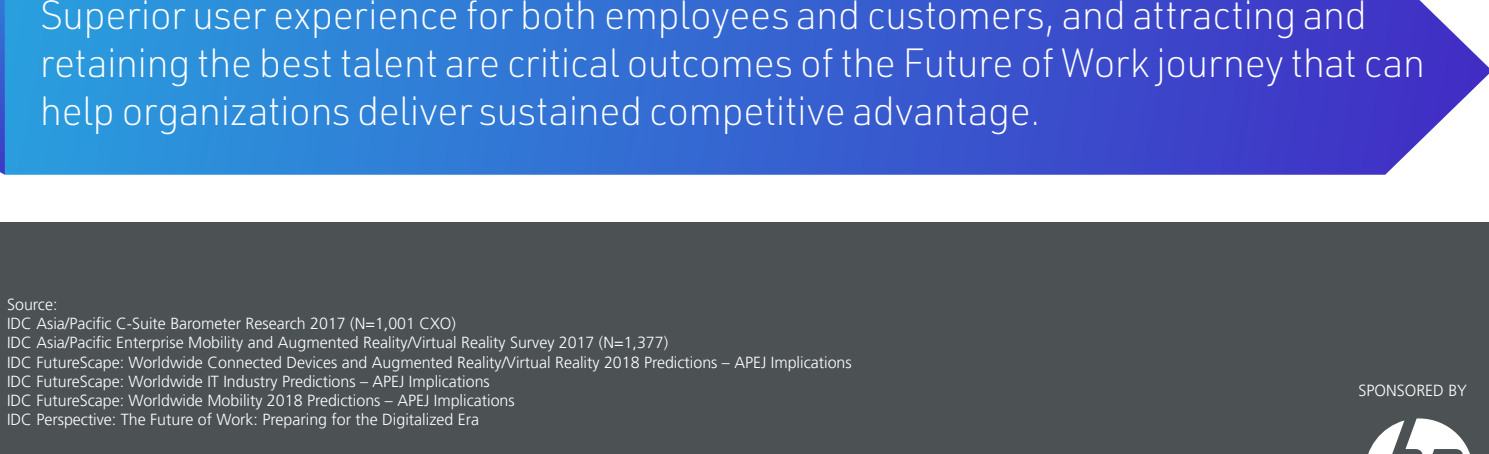


Key Industries Adopting AR/VR



THE FUTURE WORKCULTURE FOCUSES ON SUPERIOR EXPERIENCES, COLLABORATION, AND INNOVATION

Experience Is Paramount



User Experience

Productivity and Collaboration

Business Agility and Decision Making

Innovation Today Is about Partnerships and Ecosystems

Technology Vendors/Partners

Open Innovation

Crowdsourcing

As Organizations Drive Further Digitalization, New Workflows and Business Models Will Emerge...

Emerging technologies will have a profound impact on the way work is performed, and how products and services are created, marketed, and delivered in every sector.

...But This Transformation Is Not Without Challenges

TOP CXO CHALLENGE

#1 CHANGE MANAGEMENT IS CITED AS THE BIGGEST CHALLENGE BY CXOS IN THE DX JOURNEY

KEY IT DECISION MAKER CHALLENGES

ESSENTIAL GUIDANCE

IDC Recommends a Holistic Transformation across the 3 Dimensions of Future of Work

The **Future of Work** is more than just an automation or technology upgrade drive. Look instead at the bigger picture of new possibilities this can create for your organization with new products, services, improved efficiencies, and innovation.

Workspace

- Adopt flexible, collaborative modern designs
- Mobilize business processes and explore as-a-service models, but ensure holistic security
- Explore immersive AR/VR business solutions and natural language voice interfaces

Workforce

- Augment human capabilities with emerging technologies
- Utilize digital talent platforms for expanding in-house capabilities
- Create a vision for future needs and train employees to develop capabilities

Workculture

- Create a coherent digital brand identity that acts as a source of differentiation
- Embrace open innovation and foster collaboration with the broader ecosystem
- Focus on talent practices that attract and nurture the best talent and reward innovation

Superior user experience for both employees and customers, and attracting and retaining the best talent are critical outcomes of the Future of Work journey that can help organizations deliver sustained competitive advantage.