



ERICSSON

Africa edition

Future of Work Life

How flexibility and technology
are changing the way we work

A Consumer Lab and Industry Lab report

This report examines how employees and employers in Africa navigate the current work environment and their views on the future of work shaped by the pandemic, digitalization and the fluctuating labor market.

Few events in our lifetimes have had such a profound impact on our daily lives and on a worldwide scale as the COVID-19 epidemic. People's normal work life, in particular, was transformed due to the various restrictions in effect worldwide.

While some work sectors could stay afloat thanks to information and communication technology (ICT) and remote working, other sectors struggled to run their businesses amidst pandemic restrictions. Nevertheless, the pandemic accelerated the development and adoption of ICT in work life. Technology is and continues to be increasingly integrated with work life – to enhance, guide, offload and act as a social glue. The expansion of digital solutions has also brought more digital friction, new fears, overlaps and silos. Overall, the increased usage of technology in work life will continue to have a profound impact in the future.

In this report, we examine what has occurred after the pandemic in a handful of markets in Africa. We look into how companies and employees deal with the current landscape, what the future work life could look like given the labor market dynamics, rapid digitalization, and the five ways employees envision the future of work.



Key findings

Flexibility is the new work life currency

Employees predict flexibility to be a future employment requirement as hybrid work continues to be the norm.



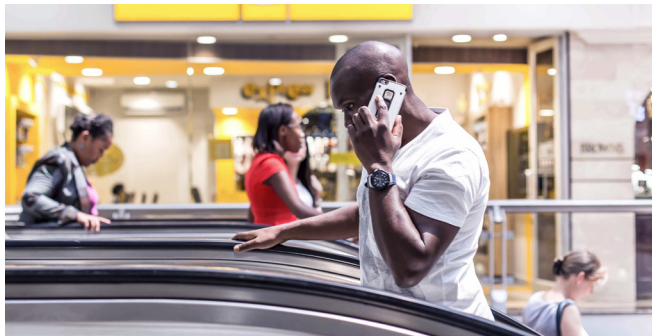
Digital technologies renew employee confidence

Using the right digital technologies boost positive feelings for employees without increasing stress.



Decision-makers and employees are increasingly at odds over technology

Decision-makers must consider employee preferences when investing in technology.



A more flexible work life requires visibility

Demand for remote surveillance and measurement increases with flexible workplaces.



Five employee paths shape the future of work

Employees prioritize flexibility, digitalization, project-based work, or career and financial stability.



Flexibility is the new work life currency

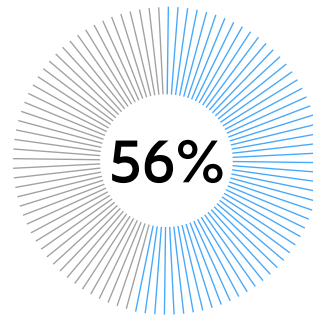
Employees demand a healthier relationship with their jobs through a more flexible hybrid work setup enabled by technology.

New work landscape enabled by technology

A driving force behind the evolving work paradigm is the desire for a more flexible work life, a sentiment shared among employees across all markets and industries. Social distancing during the COVID-19 pandemic transformed how we worked and made us realize that modifying work setups is possible with technology. Around half (51 percent) of the employees surveyed say they have enjoyed the increased flexibility at work since the pandemic started. Additionally, 56 percent consider flexible work hours or locations as key requirements and 19 percent say that flexibility would be their top priority if they were to start looking for a new job today.

Employee expectations and demands have progressed alongside emerging views on what work is and what is important in life due to the recent revelations about work and technology. Doing work rather than "going to work" is seen as the central concept of this new way of thinking about work life. What matters is the result, not the number of hours put in. Beyond just companies, employees

focus more on their values, growth and what they gain from work. A more humane, flexible and autonomous work environment is the ideal scenario for employees. 61 percent embrace technology to facilitate flexibility through remote work.



56% of employees consider flexible work hours or locations essential at work.

Type of internet connection employees use when working from home

<p>52%</p> <p>of employees use cable or fibre broadband to access the internet</p>	<p>73%</p> <p>have access to 3G/4G/5G/ routers or smartphone hotspots</p>	<p>46%</p> <p>use only cellular networks to access the internet in their homes</p>
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Mobile connectivity is key in bridging the connectivity gap and providing flexible working for those without permanent connectivity infrastructures. When working from home, 52 percent of employees use cable or fibre broadband to access the internet, and 73 percent have access to 3G/4G/5G routers or can use their smartphone as a mobile hotspot. At the same time, 46 percent exclusively use cellular networks to access the internet in their homes. Complete reliance on mobile connectivity is particularly prominent in rural areas (less than 5,000 inhabitants), where routers and cellular networks to connect to the internet when working from home. Interestingly, a significant share of inhabitants

in large metropolitan areas (over 5 million inhabitants) also exclusively use mobile networks.

Changes brought by remote work go beyond the rural/urban and geographic divides that have kept many employees confined to their offices and local areas. By enabling remote workers to either pursue a different lifestyle or return to their roots, the prospect of remote work may lead to a reverse brain drain that revitalizes rural areas and economies. For some, it means being able to stay at their birthplace and still have a career, which benefits them as individuals, as well as society and the local economy.

Work life balance and flexibility backlashes

Balancing work and personal life is essential for employees, and they consider flexibility key to achieving this. Increased flexibility in work provides more time for family and friends and can make pursuing personal interests and hobbies easier. One in four of the younger generations believe they will earn extra income through their hobbies.

Despite physical workplaces or businesses still being seen as conceptual hubs by the workforce, the rise of hybrid ways of working with a mix of in office, hybrid and remote workers suggests that hybrid working is here to stay.

Increased flexibility and fluid work patterns risk blurring the lines separating work and personal life. On average, employees split their time equally between office and outside of office. While half already feel better supported with flexible arrangements, 39 percent of employees struggle to find work life balance, and 32 percent worry that work stress levels may rise in the future due to hybrid work.

Work life balance issues also impact employee loyalty and inclination to stay; 31 percent of those considering switching employers mention work life conflict as their primary reason. This worrying trend comes at a time when 57 percent of decision makers predict that maintaining and retaining top talent will become more challenging. The solution to this problem may also lie in remote work.



Flexible loyalty with job switching

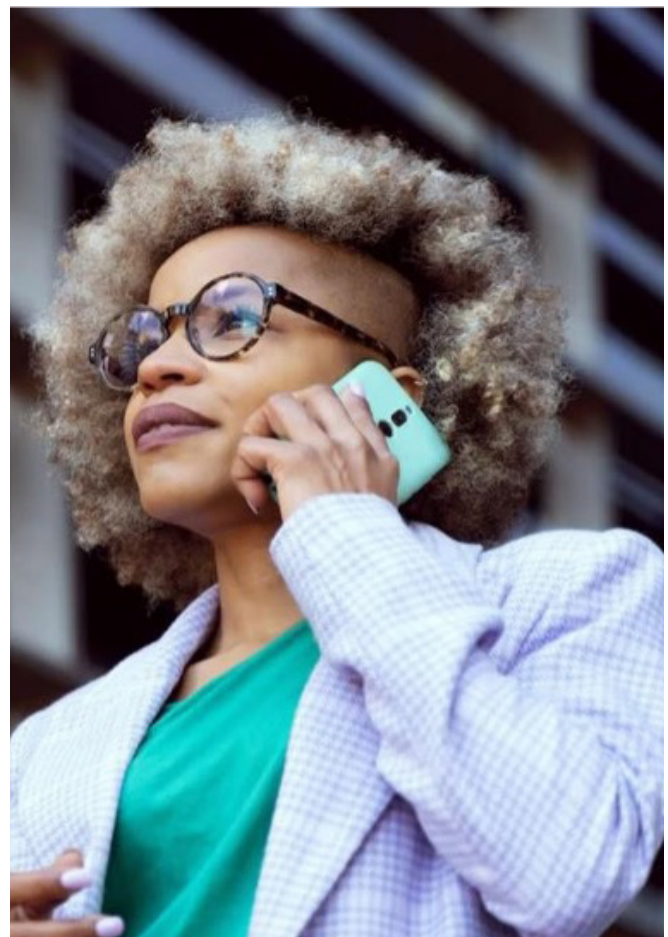
Today, switching jobs or careers to obtain better benefits, develop new skills, or access more flexibility options is increasingly common. We found that 36 percent of employees say they would seek change after what they felt was enough time at their present employer. Millennials and Generation Z are particularly prone to this behavior ([LinkedIn data 2022](#)).

Some employees will likely quit their jobs or decline a new employment offer unless given flexible work options. Flexible working hours (46 percent) and office locations (36 percent) are among the top three reasons employees accept a job offer.

Over half of the decision makers are aware of this trend and anticipate reduced employee loyalty and increased job hopping among skilled workers. Consequently, they are actively searching for solutions, including offering additional upskilling, establishing hybrid work playbooks, and bringing in talents remotely or on a project basis.

Companies must acknowledge the strive for flexibility and make deliberate decisions to develop a modern employee experience that many employees seek to better align with their workforce. This transformation goes beyond simply allowing workers to use their private broadband connection to work from home or using state-of-the-art video meeting technologies.

Employers must also consider how, where, and when employees collaborate in a digital culture. What are their needs in terms of connectivity, devices, and interaction? And how can equity be fostered between on site and remote workers?



Digital technologies renew employee confidence

Technology offers functional and psychological benefits for employees, but continuous upskilling is needed to use its benefits fully.



Pros and cons of increased technology usage at work



On a societal level, the COVID-19 pandemic is recognized as a digital tipping point and that it has contributed to a steadily growing usage of technology. However, it remains unknown and of considerable interest how these may affect the development of the new work life in the near to long term.

There are many benefits of rising technology use. Functional advantages like productivity, efficiency, and flexibility are critical for companies and 51 percent of decision-makers have noticed that the digitalization of their work has made them more agile and flexible. Other benefits can be described as emotional or psychological, such as a sense of empowerment and authority, satisfaction and confidence, or the ability to show one’s experience using social media and other digital platforms. Our results show that along with factors like a high salary, economic compensation and flexibility, 1 out of 3 employees consider having the ability to make decisions about their work one of the top job requirements when selecting a new job.

From the decision-maker’s perspective, 66 percent of them firmly believe there will be more empowered employees in the near future.

Another positive aspect of technology is the raised confidence experienced by those who leverage digital tools in productive ways. With greater use of technology, employees have more power, increasing their satisfaction. For instance, people who feel they can influence policies on workload are generally happier at work.

Technology aids employee upskilling

Fast-paced technological improvements require continuous employee upskilling since they must maintain their digital skills to benefit from these advancements.

Interestingly, technology will also support employee growth through training and learning tools, according to 67 percent of employees.

Digital training tools are also important for ensuring employees remain valuable to their present employer and to the labor market at large. They offer the potential for skill development without the need for travel to classes or time away from work, making it

time and cost-efficient. 7 out of 10 decision-makers anticipate using online platforms and services to upskill and train workers in the future. The knowledge and ability to leverage technology for one’s benefit distinguish employees with positive experiences with technology from those who feel negatively.

However, our research demonstrates that when we use technology more frequently, the positive effects will increase while the negative effects stay the same. Negative feelings like stress or feeling overwhelmed by technology do not grow with more intense usage (Figure 1). Additionally, employees who claim to have access to appropriate technology at work report feeling twice as good when using technology than those who do not.

Experiences from using technology at work



Figure 1: The share of employees who feel empowered by technology is significantly higher than those who feel overwhelmed.

Decision makers and employees are increasingly at odds over technology

Technologies bring vast benefits for companies, but only if employees are able to use appropriate digital tools

ICT improves productivity

Decision makers believe that the increasing use of ICT (up by 61 percent) is one of the most important work trends since the pandemic began, and they have noticed a change in their teams' behavior. With this shift, 50 percent of decision makers report doing most or all of their work using digital tools, and 52 percent claim that greater technology use has improved their organizations' productivity. As a result, decision-makers have a newfound appreciation of technology.

67%

of decision maker want to prioritize investments in new tools and technology for employees



Decision makers need to walk the talk

Although businesses are aware of the benefits of digitization, only 3 out of 10 employees feel they have access to the necessary digital tools at work, and 6 out of 10 companies claim they have not set up the necessary technology for their employees. Consequently, companies are predicting additional investments in workplace technology, and decision makers believe these investments should benefit the employees. A staggering 67 percent say it is crucial to prioritize investments in new work tools and technology to aid employees, even over other areas like marketing, consulting services and new business ideas. However,

when it comes to making the investment choice, decision-makers fall short of their commitment and put cost- and time-saving strategies ahead of the preferences and demands of their workforce.

The most obvious course of action for decision makers is to prioritize operational benefits and the direct impacts on their company's financial success. However, by neglecting what employees need and feel most comfortable using, they fail to fully capitalize on digitalization's impact on productivity. This discrepancy on technology is causing distrust and information silos between employers and employees.

Decision drivers for acquiring new technology

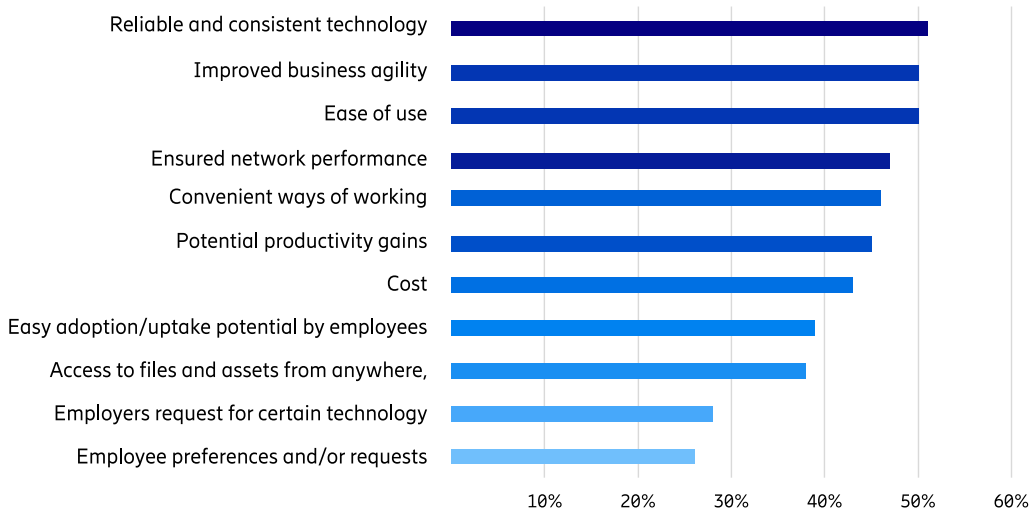


Figure 2: Decision makers and employees have different priorities when determining technologies to invest in.

Misalignment in technology is causing friction

The digitalization of work processes in response to remote work and flexibility demands companies to increase their use of ICT applications. Gartner research shows an average user will use up to 40 different applications daily or 6 to 8 applications for a single process (Gartner Digital Friction Survey 2020).

However, as businesses deploy more ICT applications, digital friction – the additional work needed to use data or technology – is becoming a bigger issue for employees. The friction caused by context switching and toggling tools to search for data and collaboration hinders productivity gains. When work is fragmented among various unconnected tools, there is a risk that employees will become stressed and inefficient and that they will duplicate tasks and information. Already 4 in 10 employees struggle with overlapping technology and tools that are too complex to use or have too many unnecessary feature.

50%

of decision-makers believe faster internet connectivity will make their business more agile



Turning friction into an opportunity

Decision makers have a genuine opportunity to cooperate with employees as they now consider digitalization a game changer in driving productivity and employee wellbeing. Focusing on the digital employee experience rather than short term cost savings could result in long term wins, resolve conflicts between employers and employees, and lessen digital friction. As a result, efficiency would rise and reduce duplication related costs.

Another good starting point for reducing friction in the era of hybrid and remote work is ensuring that employees have devices fit for remote work and steady and reliable connectivity regardless of where they work.

Decision makers believe fast connectivity and business agility go hand in hand. Half of them say faster internet connectivity would improve their business agility.

Focusing on this increased connectivity can lead to employee and customer experience advantages as decision makers understand that this will boost internal collaboration and customer experience.

Companies cannot always control the availability of high speed connectivity, but they can ensure data subscriptions and devices are ready to take advantage of existing and new network capabilities. For instance, providing mobile broadband devices or, where available, 5G enabled devices and E SIMs could make remote work seamless for employees and elevate the discussion on who should carry the cost for a remote employee’s home network.

A more flexible work life requires visibility

Demand for remote surveillance and measurement increases with flexible workplaces.

Over 70 percent of employees and employers expect the share of total worktime carried out at home to increase by 2025. However, flexibility may come with a price of greater monitoring and control as employers require higher work visibility. 6 in 10 of the employees think technological advancements will enable work from anywhere. Among them, 68 percent also think monitoring will be commonplace compared to 22 percent who do not. Without the possibility of direct communication with remote workers, the demand for remote surveillance and measurement tools has dramatically risen.

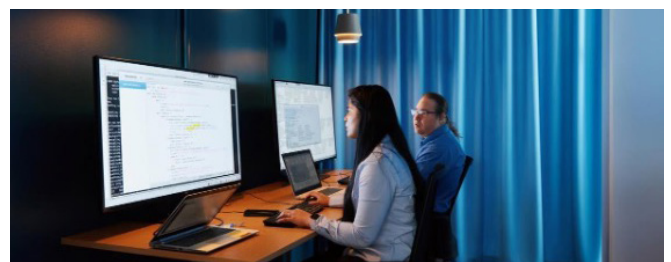
74%

of decision maker want to guarantee security and integrity of employee data



Increased use of monitoring tools

According to [Gartner research](#), the percentage of large employers using IT-enabled tools to track their employees has doubled to 60 percent since the start of the pandemic, and is anticipated to reach 70 percent in the next three years. Our study respondents also agree with the expected rise in work monitoring. The majority (71 percent) of decision-makers believe employee performance monitoring through technology will be standard soon.



Five employee paths shape the future of work

Various contexts and priorities mean employees envision and strive for different work futures

One vision fits none

There is no single answer regarding how the future of work will look like or how to enable it. The future of work is uncertain and multifaceted, with various paths and outcomes shaped by the diverse desires and needs of employees, the objectives and approaches of companies, and cultural and societal factors. Society will accelerate this evolution as it becomes more individualistic.

In our research, we have looked at employees' wants and needs and identified five alternative paths employees will lean into to shape their future work lives. The different paths are based both on more recently emerged drivers, such as increased digitalization, flexibility and project-based work and more traditional motivators, such as the search for stability, career, and financial drivers.

The paths we identified are Projects first, Flexibility first, Stability first, Career first, and Technology first, each named after the central driver for employees in each group (Figure 4). In all the markets studied, the paths are represented in differing degrees. We observe that some paths are more prevalent in some areas than others, which suggests that the various core drivers resonate with the cultural context in each market. We also see generational differences, with some paths preferred by certain age groups.

These results reflect how context and life stage have impacts on what drives and motivates professionals. Employees who pursue a path will value and be driven by factors related to its core driver when determining how to shape their future work lives.

Five employee paths shaping the future of work

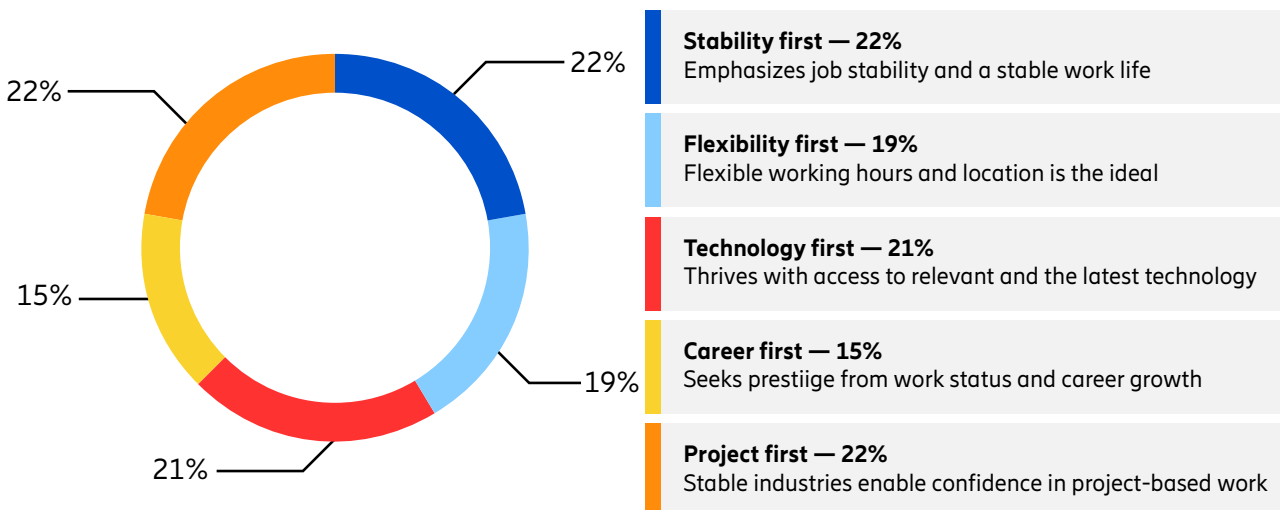


Figure 4: Employees tend to follow one of five paths to shape their vision of the future of work based on their priorities.

Stability first

One in five employees has a more pragmatic view of their work, even when looking for a future job. Work priorities for this group focus on factors like job stability, a fun social atmosphere and salary, but ultimately, they are mainly looking for a stable work life. This view on the future workplace is more common among Generation X and baby boomers. This group is least interested in working at different locations outside of the workplace itself. On average, this group imagines a future with approximately 46 percent remote work compared to 47 percent among all employees.



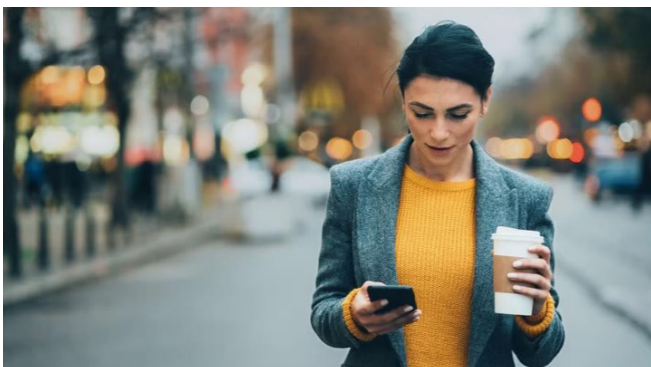
Flexibility first

One in five employees believe the emergence of the future work life is driven mostly by more flexibility in where and when they work. 47 percent of this group already think flexibility is available in their current work, compared to an average of 51 percent in the rest of the working population. However, at 81 percent, they have much higher expectations of future flexibility compared to 56 percent among other employees.

No specific demographical subgroups or types of workers are more common in this path. Instead, the main distinguishing character is the higher focus on family, friends and leisure time in relation to the importance set on status, work and money.

Technology first

Roughly one in five employees share this view of the future of work. The future of work concept is centered around the availability of the latest, best and most relevant technology. The focus on technology as an enabler of workplace empowerment comes from more than just earlier positive experiences, but can also be the result of bad connectivity or other technology issues. The dominating factors for accepting a new job are the technology used at the workplace and the salary. This group also strives to work for larger companies.



Career first

Around 15 percent of employees state that both their current and future primary way of looking at work is nearly categorically driven by creating a career and having a position that symbolizes status.

While this group does not express higher expectations of technology for future work tasks, they generally show much higher usage of technology at work, especially for networking and keeping up to date with innovations and work opportunities. For example, they use social networking and video conferencing services around half an hour more every day than the average employee.

Projects first

This outlook on the future of work favored by around a fifth of employees emphasizes flexibility and working on a project- or temporary-assignment basis. Remote work can and will play an important role in this setup. Employees in this group can be characterized as potential gig workers who wish to make the most of technological advancements and the opportunities presented by a globalized labor market.

Approximately half of the group are managers, business owners or sole traders.



Final reflections

It is abundantly evident that the COVID-19 pandemic has significantly impacted work life, and the changes it has sparked will impact how we work, view work and use technology in the foreseeable future. Decision-maker and employee opinions on the future of work are generally similar. Our survey shows that digitalization and flexible workforce management are key factors in their vision of the future. The views and priorities of decision-makers and employees do, however, differ from one another.

Employers should be aware that employees will approach the future of work differently and should endeavour to reconcile their needs with the company. To accomplish this, decision-makers must understand employees' preferred paths, consider their input, communicate openly and consistently, and have an inclusive mindset when making decisions regarding the future of work.

When it comes to technology, employees inclined toward one of the five paths will gravitate toward different types of technological devices and tools for work. Simplified ways of working and cloud technology that bridges multiple devices and platforms will be critical for accommodating any paths. At 77 percent, most of the decision-makers already recognize that having a setup to handle multiple connected devices will be critical for their business.



Employers will need to consider several key aspects when creating the future of work regardless of the dominating path among employees. One crucial factor is understanding how a digital culture plays into the traditional corporate culture. Another is ensuring that technology is set up to support the promoted values, behaviors, and business and compliance standards across the virtual and physical divide. This should be approached through technological enablement, autonomy, and worker empowerment.

Decision-makers and employees focus on different areas to reach their goals and enable the emerging future work life. Employees,

77%

of decision-maker know it is essential for their business to have a setup that allow for multiple connected devices

as individuals, aspire to change their lives as per the five different paths. On the other hand, as employers, decision-makers focus on related but different areas such as workforce management (including core processes like HR, costs, productivity, upskilling and ways of working), technological empowerment (making decisions and investments in platforms, devices, and applications) and automation (seeking to increase efficiency and simplification of work processes).

While there is some alignment between the views of employees and decision-makers on the future of work, friction is inevitable. Employees in our study voiced disagreements on the type of technologies companies should invest in, and some fear becoming redundant with the increased usage of technology and automation. Decision-makers must acknowledge that cutting headcounts through automation is not the only option. Previous industrial revolutions changed how work is done, [transformed](#) the workplace, and both created and eliminated certain jobs. Given today's increased focus on human-machine interaction, the future digitalization of industries is expected to generate new jobs rather than replace them in fields such as analysis, strategy, and leadership.

In summary, flexibility and intentional digital setup that supports humans and simplifies how we work will make the workplace of the near future possible if handled in the right way. It is based on fast, reliable, and secure data connectivity that allows systems and people to exchange data. Widespread high-speed connectivity is a base demand as work needs to be agile and allow for high levels of adaptability. This implies that infrastructure investments will be necessary in rural and city environments to support a more global work setting. Equipping employees with new devices and a setup that takes advantage of existing and potential infrastructure upgrades will also drive the need for further improvements.

A fresh perspective on work drives the redefined work life; a culture and set of values that place transparency, equity, and humanity at the forefront; and an environment where technology empowers leaders and staff to collaborate and thrive.

Methodology

The foundation for the conclusions and statistics presented in this report are based on two different pieces of market research carried out during 2022.

- 5,000 online surveys of employees aged 18-65 within 5 markets in Africa; Egypt, Kenya, Morocco, Nigeria, and South Africa.
- 600 online surveys of decision-makers aged 18-65 within Egypt, Morocco, and South Africa.



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