

Blue-Collar Report 2021

The Evolving Paradigm





The second wave of COVID-19 has been a challenging period for many. The pandemic will have a long-lasting impact on India's job market, too, especially on blue-collar employees.

However, as the economy emerges from restrictions, businesses are resuming activity and there is likely to be a heightened demand for blue-collar workers. We see this as an opportunity for economic growth.

BetterPlace, with inputs from industry experts, has prepared this report, which analyses the current scenario, provides insights into the challenges and emerging trends in the blue-collar ecosystem and throws light on what lies ahead. We have relied on data from our many platforms that help companies hire, manage and engage with the blue-collar workforce. Our integrated systems encourage ease of use and enable companies to reap the benefits of our platform.

We believe this report will guide companies, policymakers and leaders with the necessary data and insights to unlock growth and create a livelihood for millions of blue-collar employees.

Pravin Agarwala, Saurabh Tandon
Founders, BetterPlace





Demand 05

Overall
Segment Wise
State Wise

Impact of COVID 09

Overall
Segment Wise

Interstate Migration 12

Migration Pattern
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Digitalisation
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• Rise of the Gig Economy 22

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KEY TAKEAWAYS



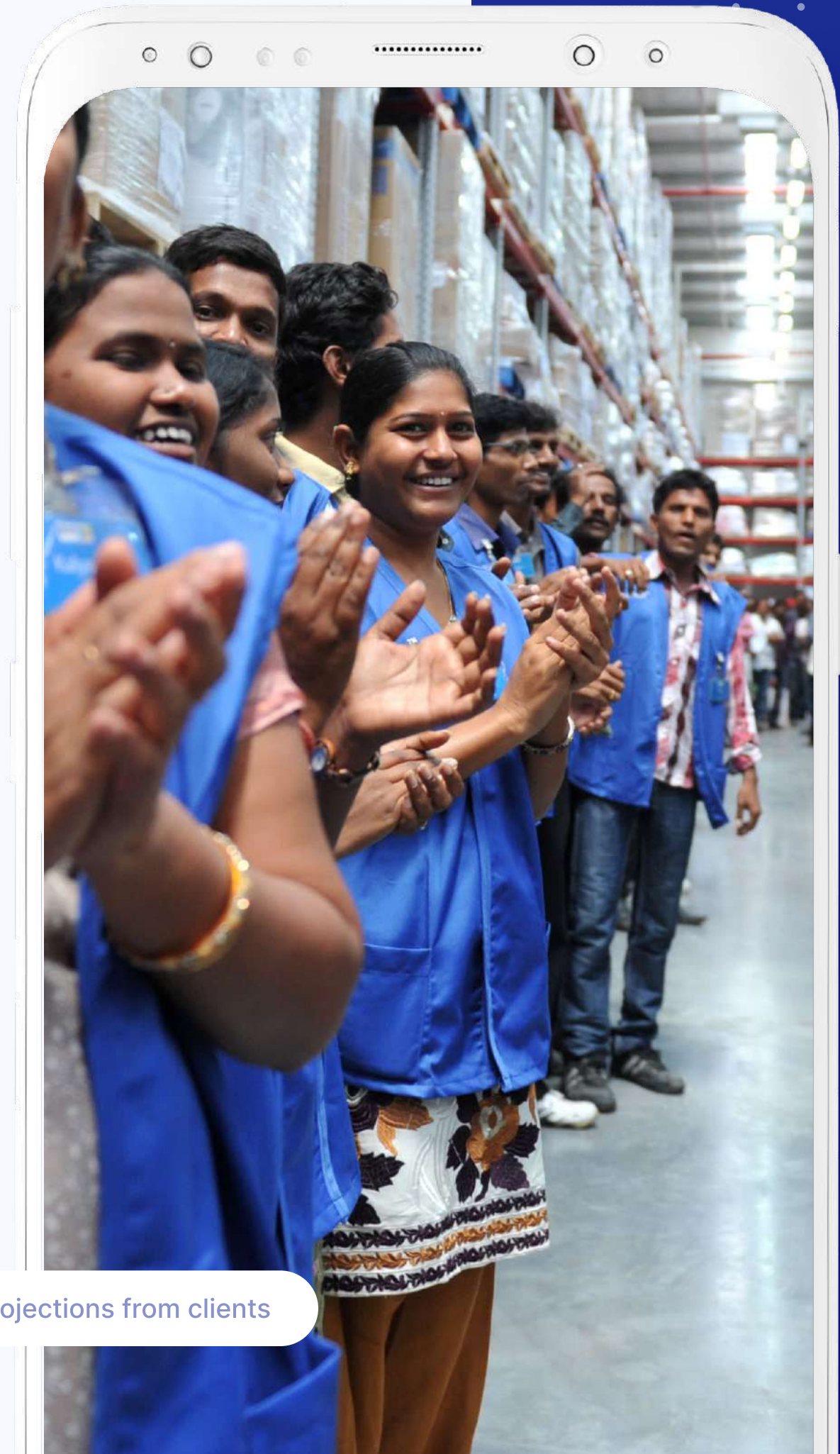
- **7 million jobs are likely to be created in 2021**
- **Impact of the second wave of COVID-19 on jobs not as severe as that of the first wave**
- **Interstate migration has reduced**
- **A permanent shift in migration patterns for Driving and Delivery segments was witnessed**
- **3 Major trends in the blue-collar workspace**
 - Technology Advancements
 - Simplified Labor Codes
 - Rise of the Gig Economy



7 million

Jobs are likely to be created in 2021

- 137% of 2020 demand
- Delivery segment is expected to be the key driver
- 50% of the demand is likely to come from 4 states



137%
of 2020 demand



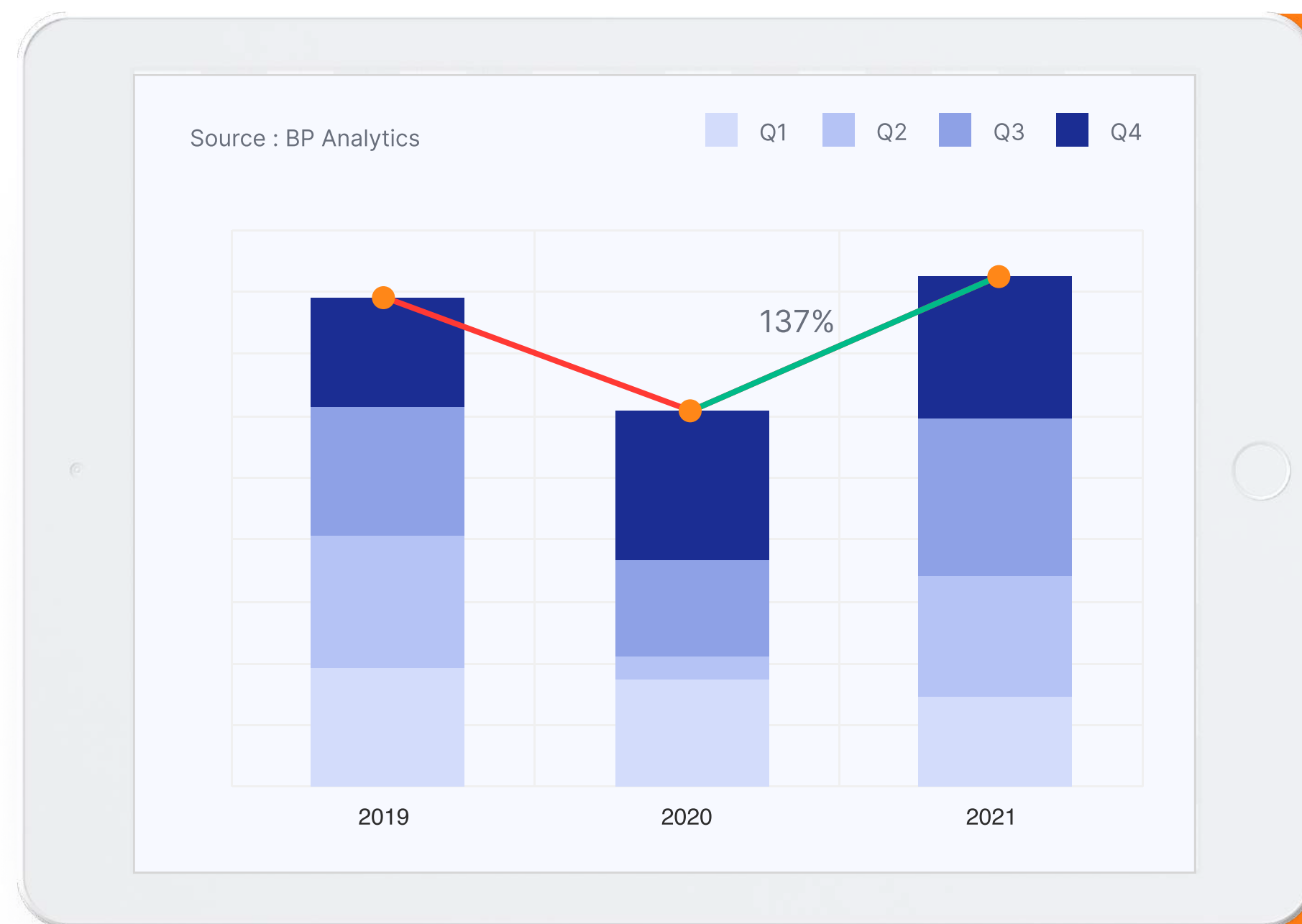
Demand is likely to reach pre-COVID levels

104% of 2019



Demand is expected to pickup in H2

2021 and is likely to be **141%** of H1



Delivery

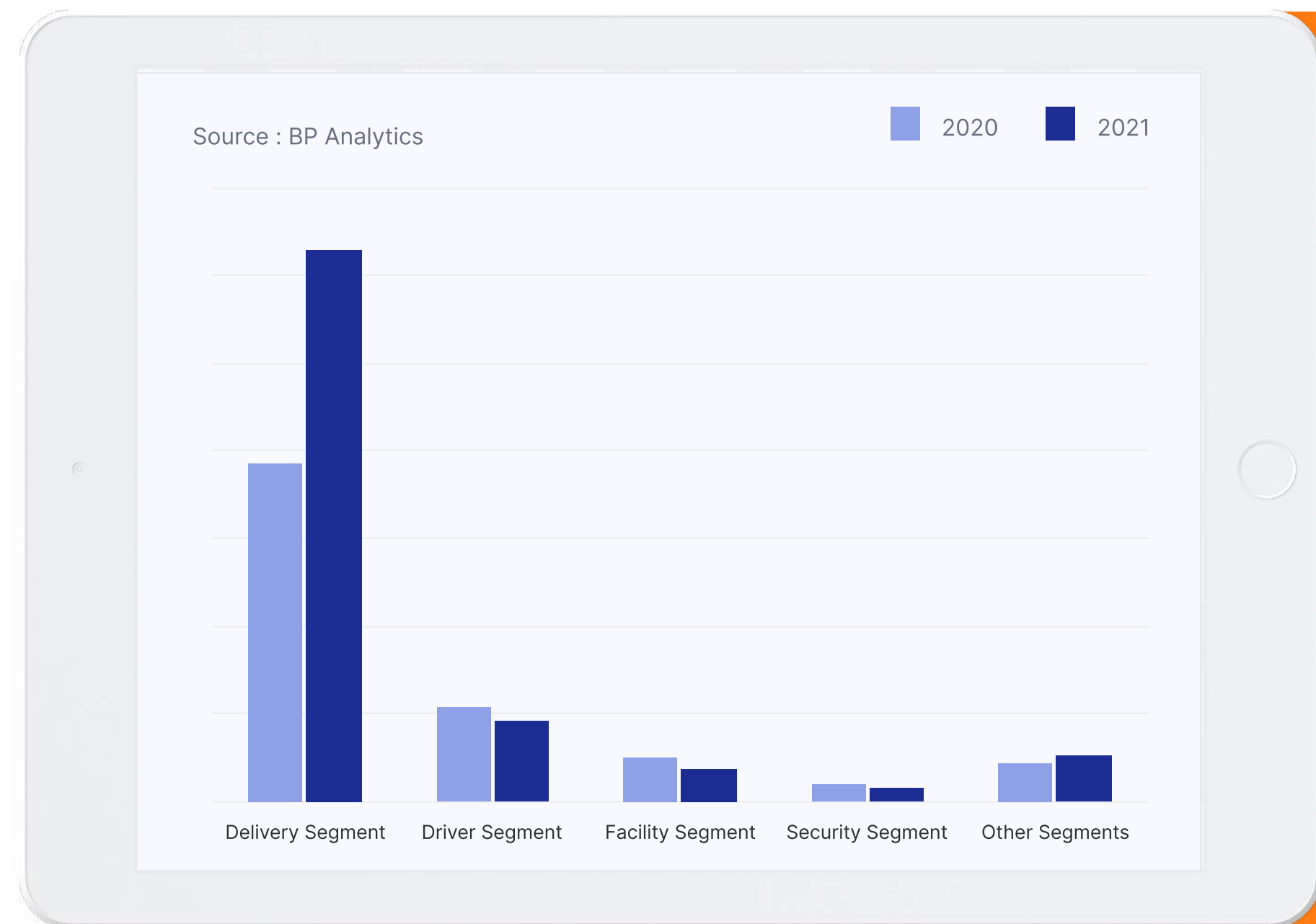
segment is expected to be the key driver



Delivery segment is likely to be the silver lining with demand growth of **1.6X**



Driver segment is likely to close the year at **85%** of 2020 demand



50%

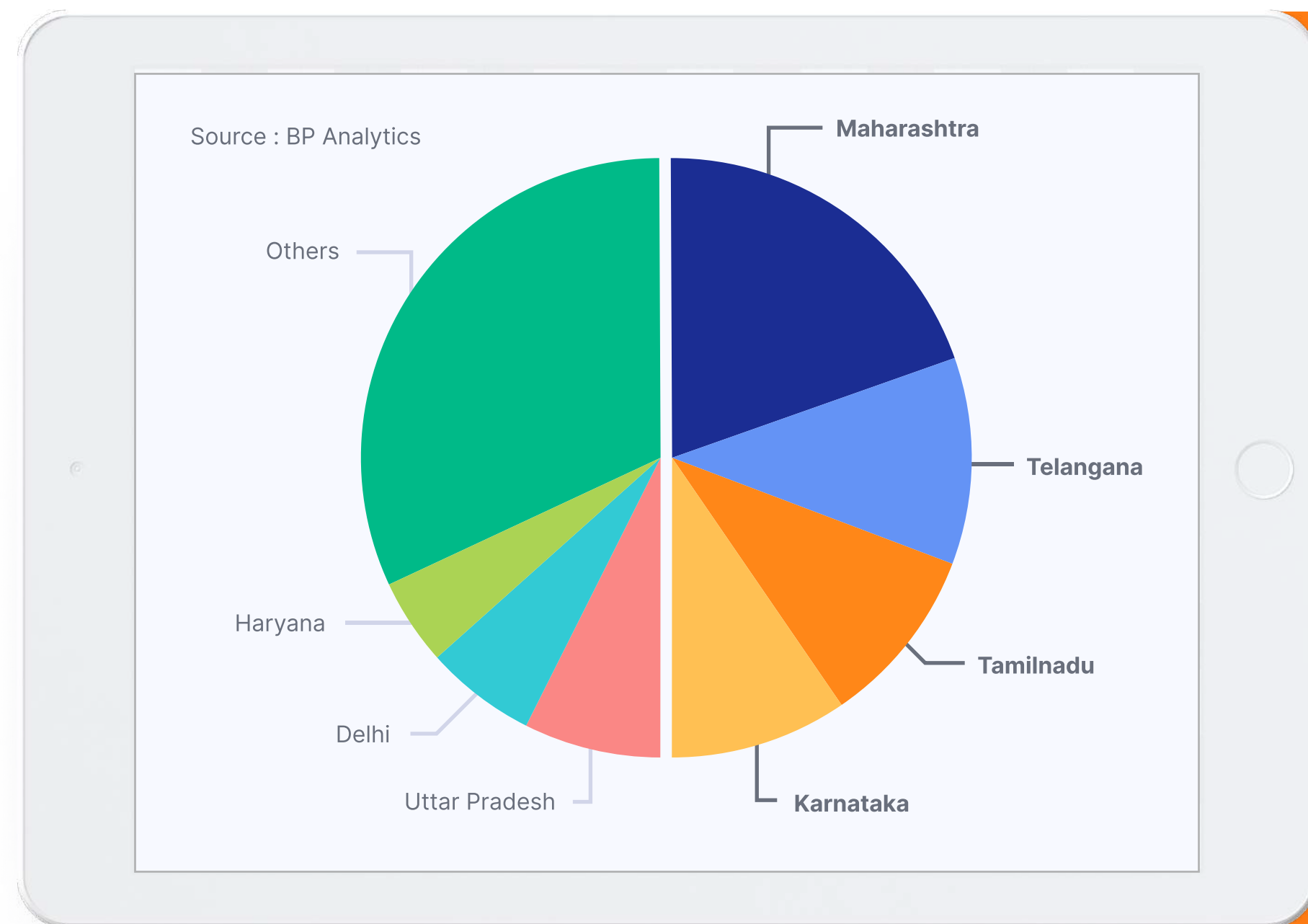
of the demand is likely to come from 4 States



Top 4 States - **Maharashtra, Telangana, Tamilnadu and Karnataka**

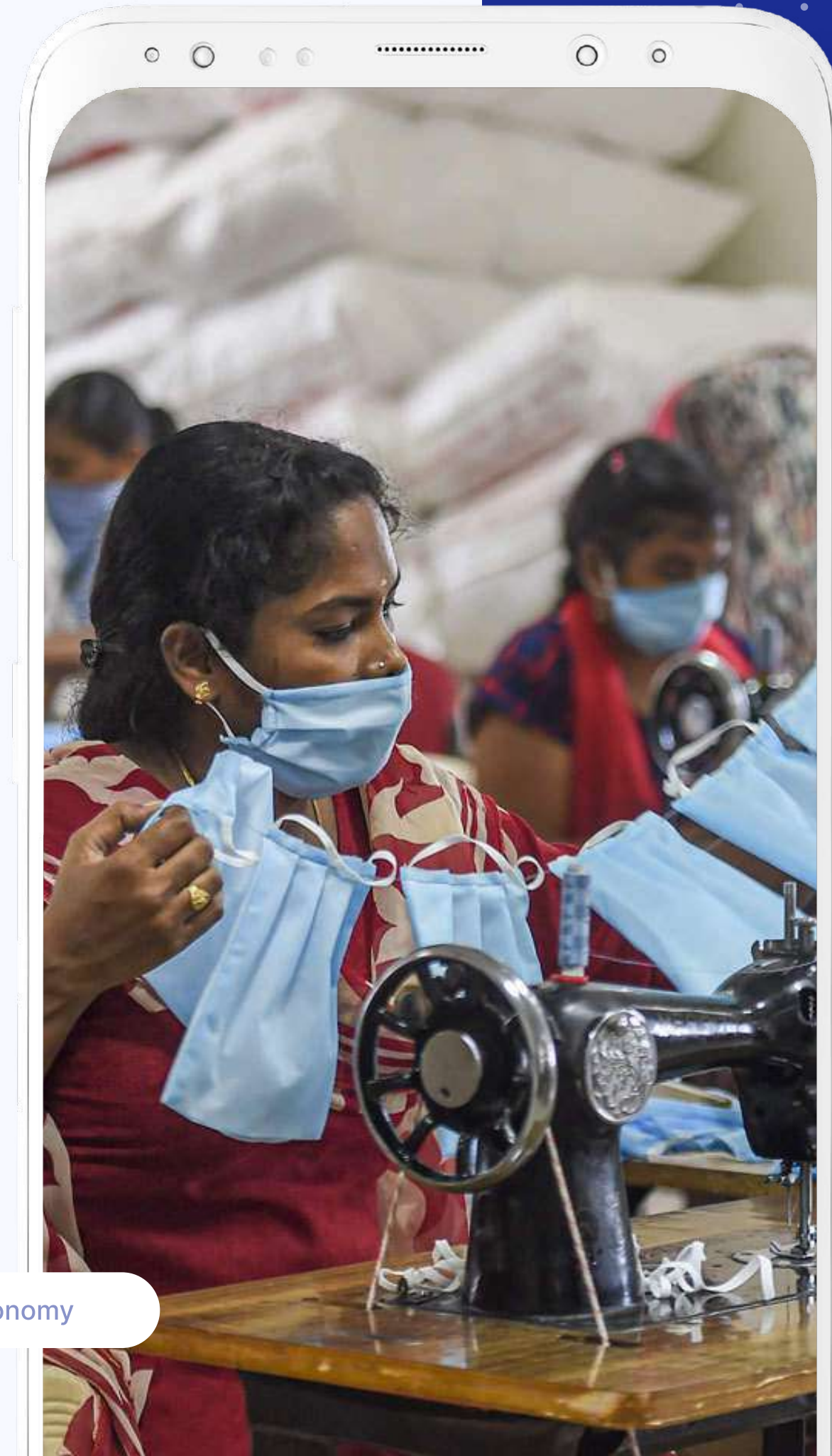


Maharashtra is expected to be the largest contributor with **17%** demand



Impact of the second wave of COVID-19 on jobs **not as severe as that of the first wave**

- Overall jobs demand witnessed a marginal increase during the second wave
- Driving and Security segments were majorly impacted during the second wave



Overall Jobs demand witnessed a
a marginal increase
during the second wave



There was a complete arrest of movement during the first wave



During the second wave business activities were allowed with limitations



Driving and Security segments were
majorly impacted
 during the second wave



The impact is likely to be a short-term setback



In Q2 2021 **Driver, Facility and Security segments** went down by **40%, 25% & 40%** respectively, while **Delivery segment** grew **175%**



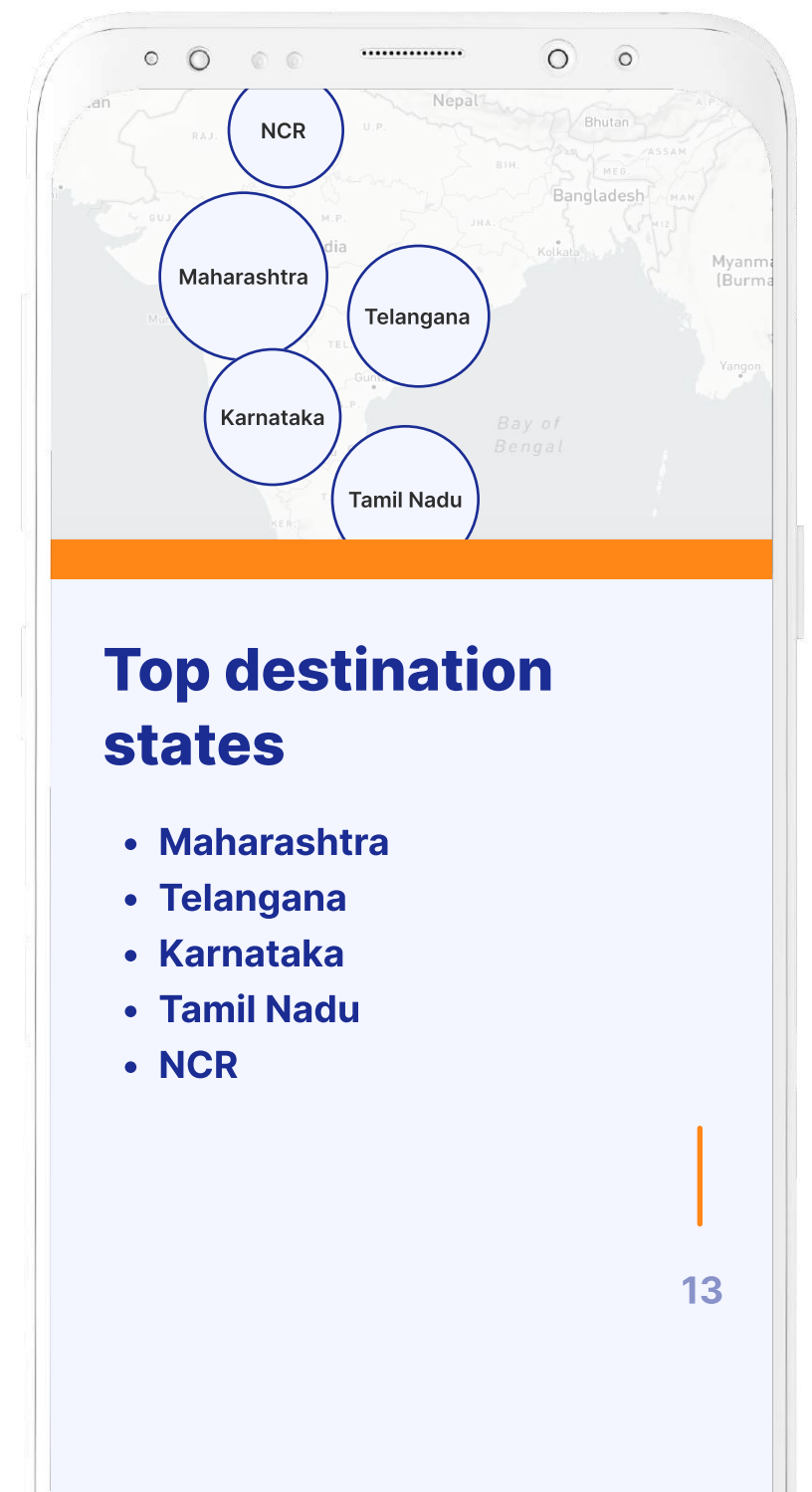
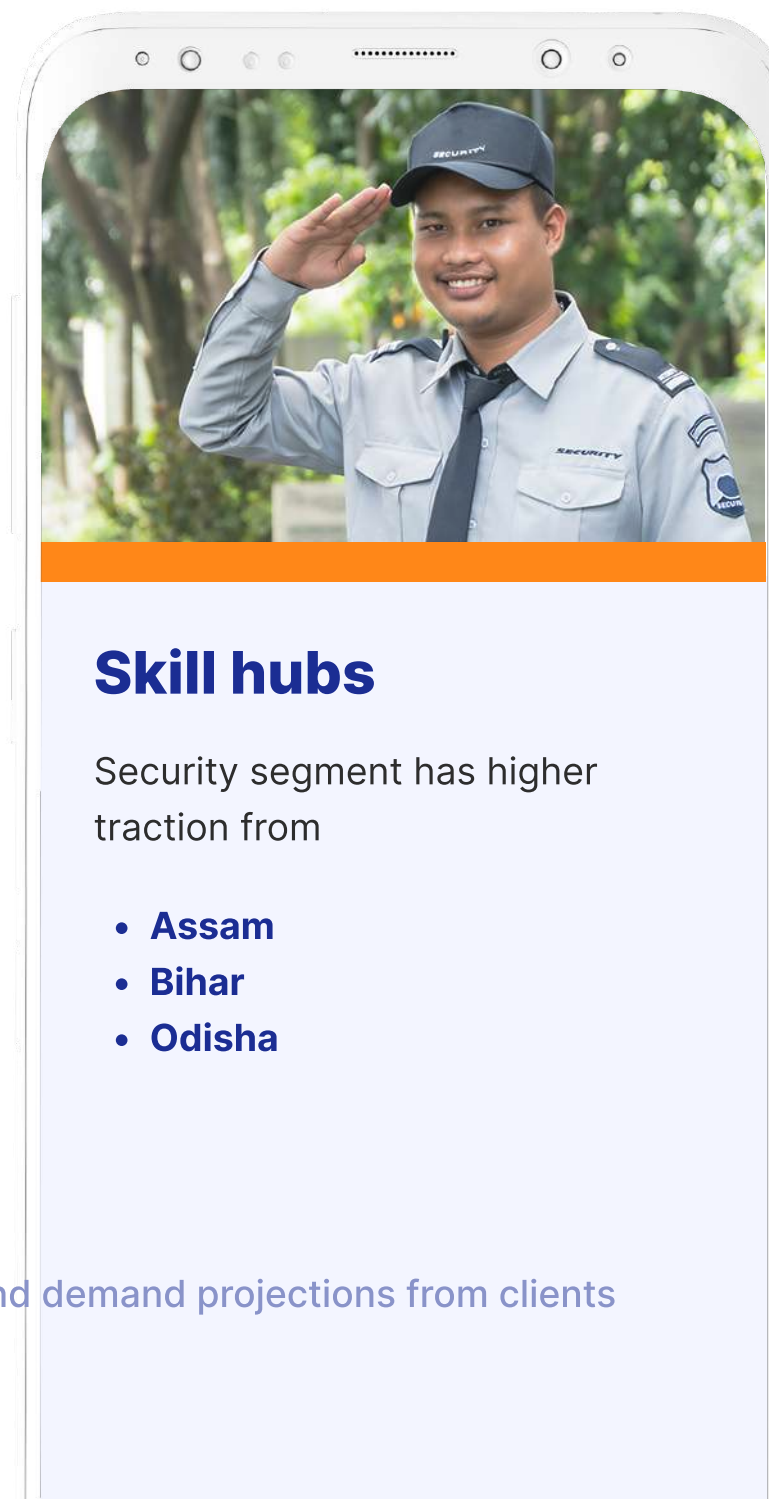
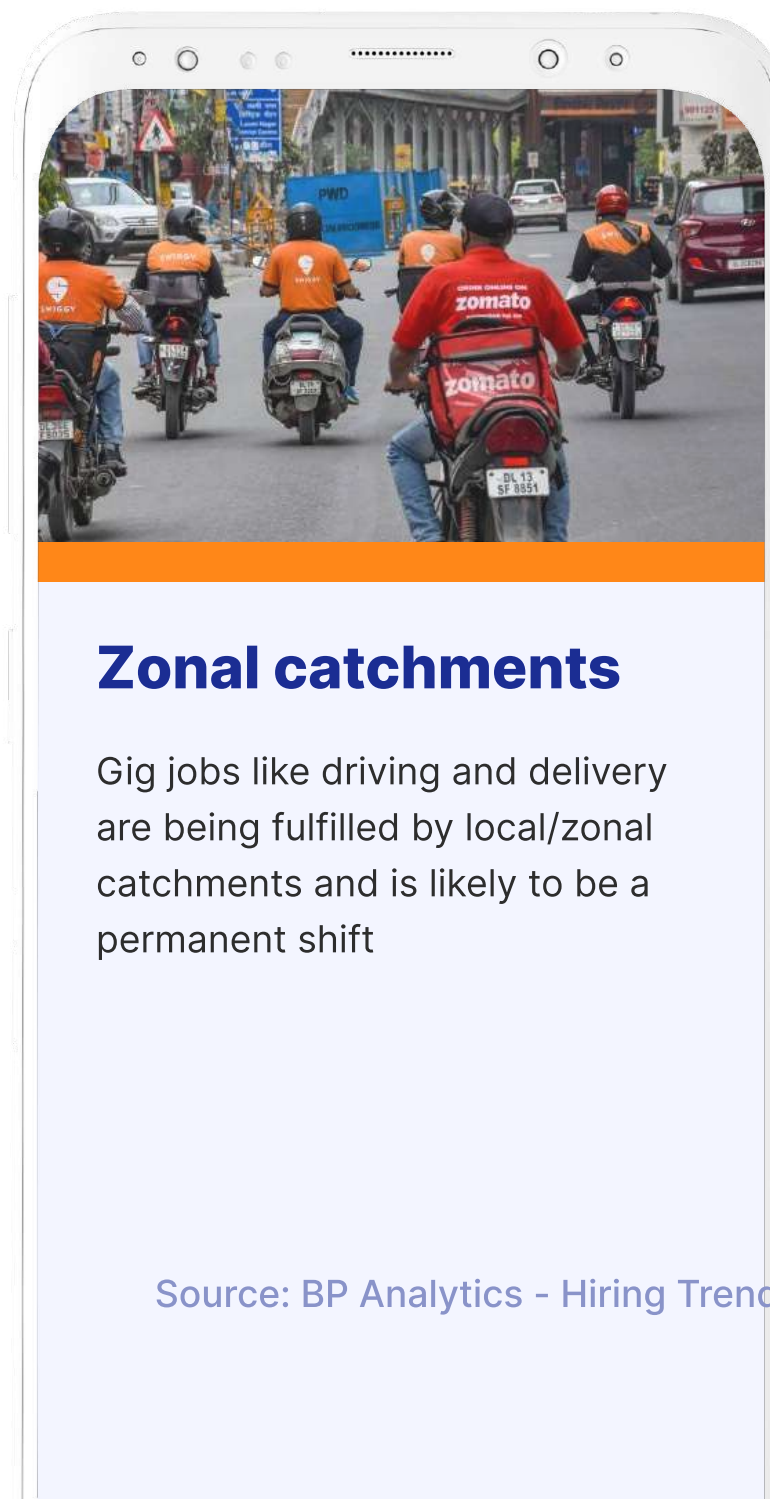
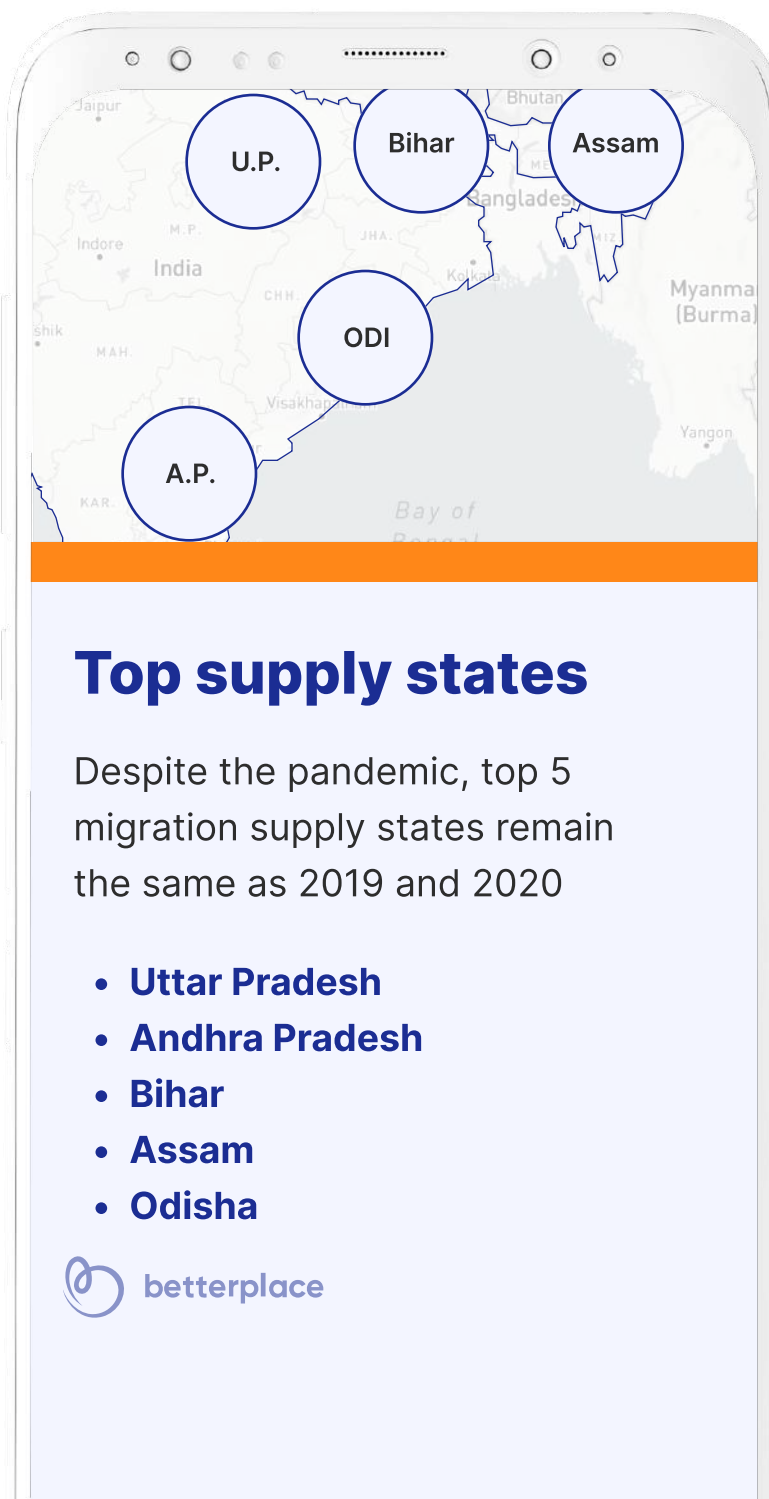
Interstate Migration has reduced and
**a permanent shift in
migration patterns**
for Driving and Delivery segments was witnessed

- Due to the pandemic, more workers tend to stay within their states and work gig jobs
- There is a clear migration pattern based on skill hubs, location and segments
- Migration is expected to pick up once the lockdown situation normalizes and IT/ ITes segments open up



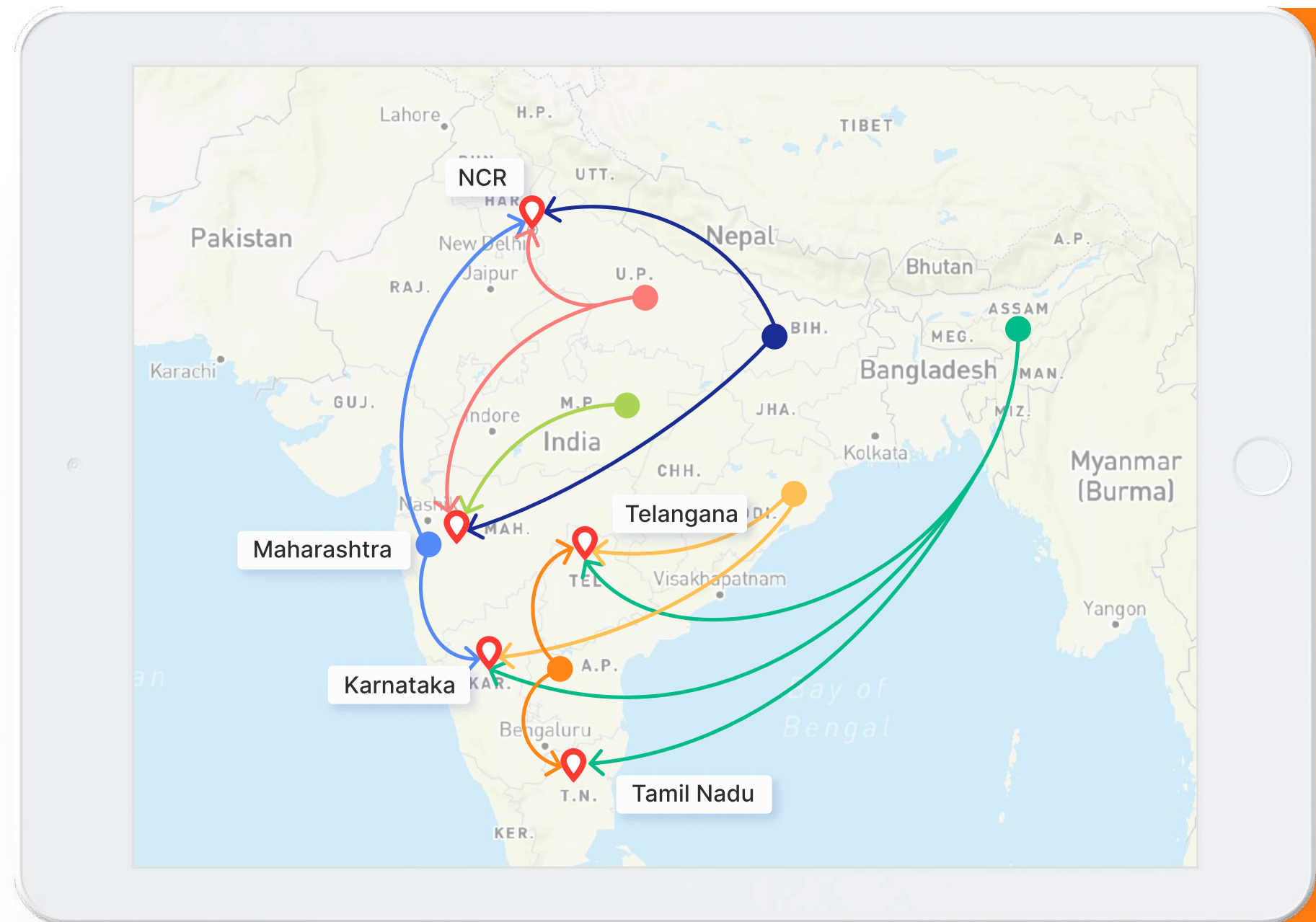
Migration pattern

based on skill hubs, location and segments



Migration trends 2021

- Bihar to NCR and Maharashtra
- UP to NCR and Maharashtra
- Odisha to Karnataka and Telangana
- Madhya Pradesh to Maharashtra
- Assam to Karnataka, Telangana and Tamil Nadu
- Maharashtra to NCR and Karnataka
- Andhra Pradesh to Telangana and Tamil Nadu



KEY BLUE-COLLAR TRENDS

1 Technological
Advancements

2 Simplified
Labour Codes

3 Rise of the
Gig Economy



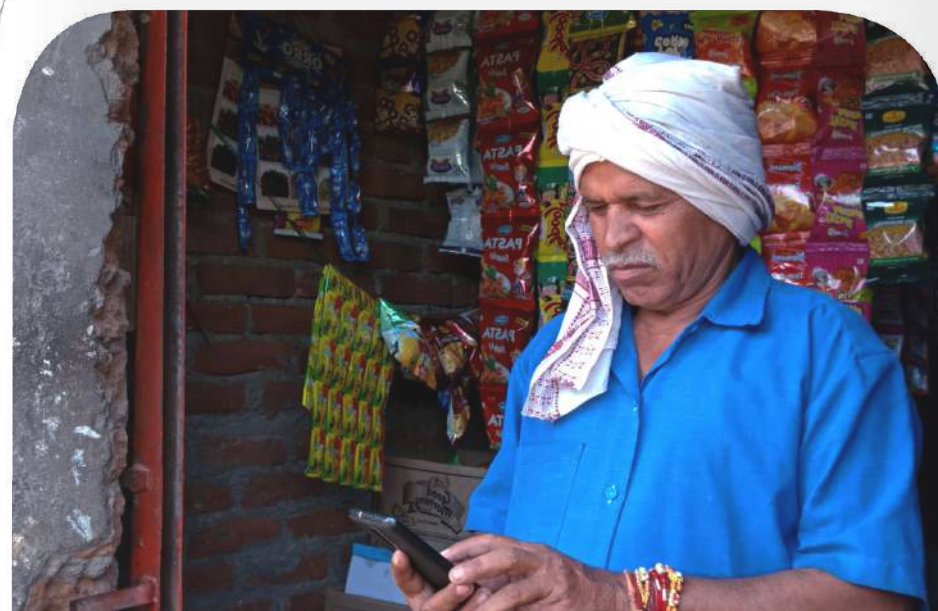
1.

KEY BLUE-COLLAR TRENDS

Technological Advancements

Technological advancements are rapidly happening across the blue-collar value chain via digitalisation and machine learning, with the sector receiving **\$100 Million+** funding in the last 12 months





Employees going Digital

33+ Million

downloads of blue-collar job board apps



Initiatives by the Government

Launch of ASEEM portal for better employment opportunities

13+ Million

employees enrolled

1.3+ Million

job openings from employers

Source: Google Playstore, NSDC and Aseem portal



Pandemic accelerated the adoption of tech by employers

Hiring life cycle has gone completely automated

Discovery (Video JDs and resumes)

Screening (Online verification)

Interview (Virtual)

Onboarding (Digital process)

Employers are looking at **large scale tech applications** to improve process and make informed decisions through smarter data analytics



Matching Jobs and Job Seekers

- Automated matching process between job seekers and employers
- AI powered chatbots in local languages to improve hiring



Background Verification

- Real-time and automated document verification
- Verification from multiple streams and sites while assessing a variety of risks



Attendance and Payroll

- Faster and accurate payroll calculation
- Better-decision making abilities - data-backed insights

Simplified Labour Codes

Introduction of 4 New labour Codes by consolidation of existing 29 central labour laws

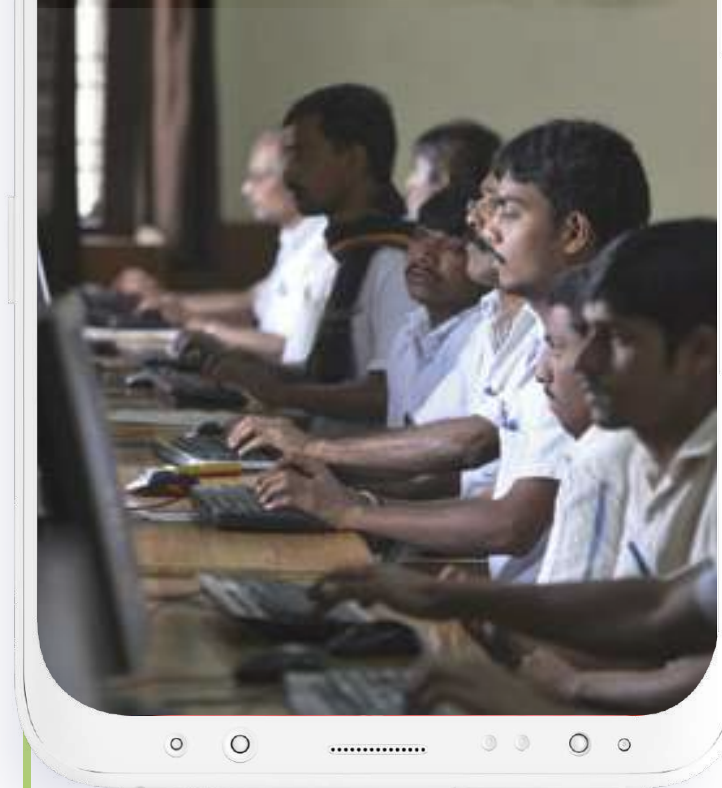
Code on Wages 2019	Subsumes four legislations relating to wages rate, time of payment and bonus
Code on Occupational, Safety, Health and Working Conditions	Amalgamates 13 labour laws relating to safety and health standards
Code on Industrial Relations	Consolidates three enactments relating to Industrial relations
Code on Social Security	Integrates nine statutes in the social security space



Expected Outcomes



Provide social security to unorganized sector employees



Streamline minimum wages and boost employment growth

Simplified compliance requirements and stricter consequences



Facilitate the informal sector to transform into the formal sector



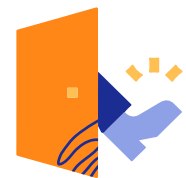
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Enhance ease of doing business





Challenges



Layoffs made easy

Employees in establishments with less than 300 employees can be laid off without Government approval



Restrictions on strikes

No employee can go on strike without giving 60 days notice



Employer Friendly

Legalisation of fixed-term contracts provide flexibility to employers for hiring and firing employees

3.

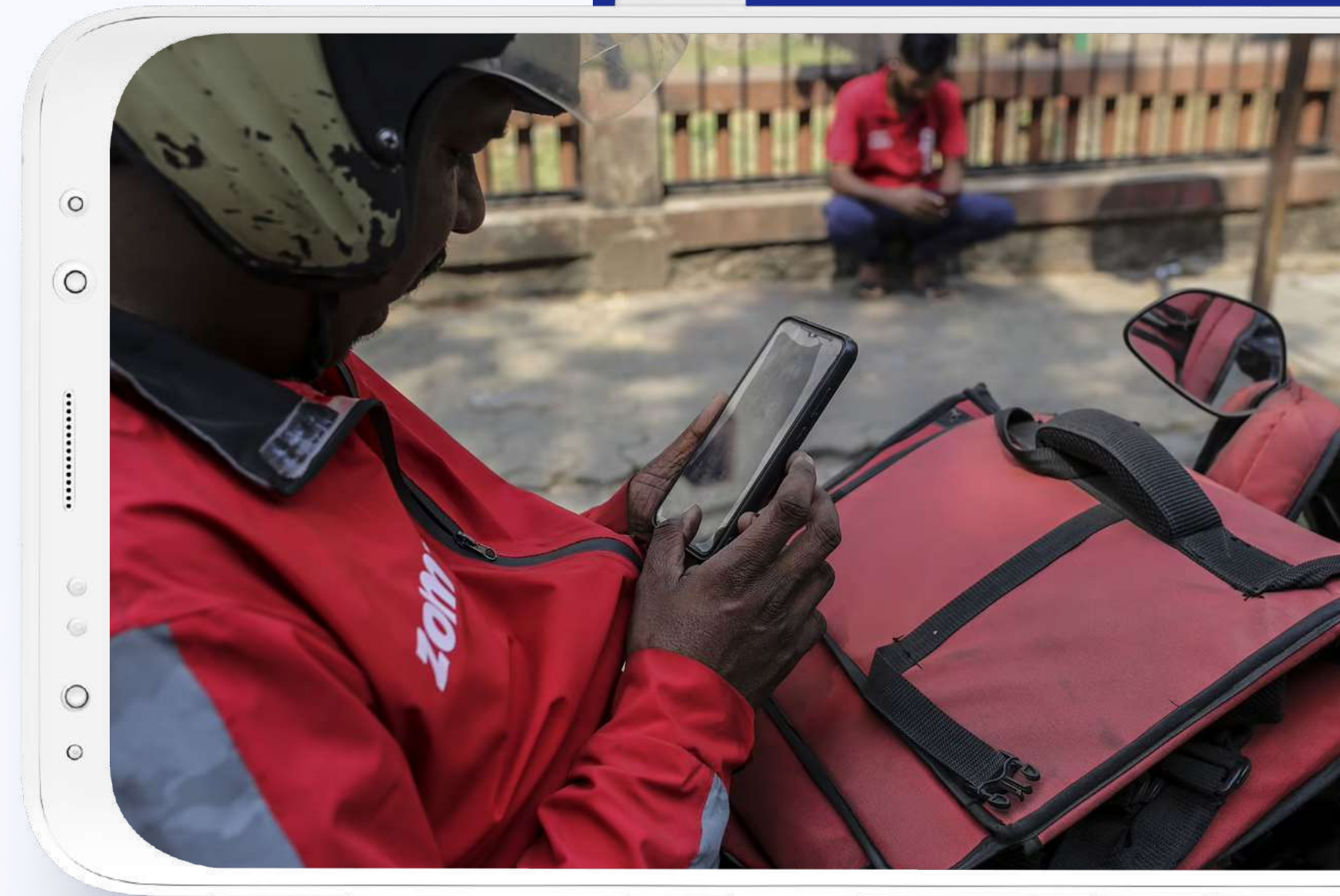
KEY BLUE-COLLAR TRENDS

Rise of the Gig Economy

Gig workforce in 2021 is likely to increase to **175%** of 2020

Gig economy can serve up to **90 million** jobs over the long term

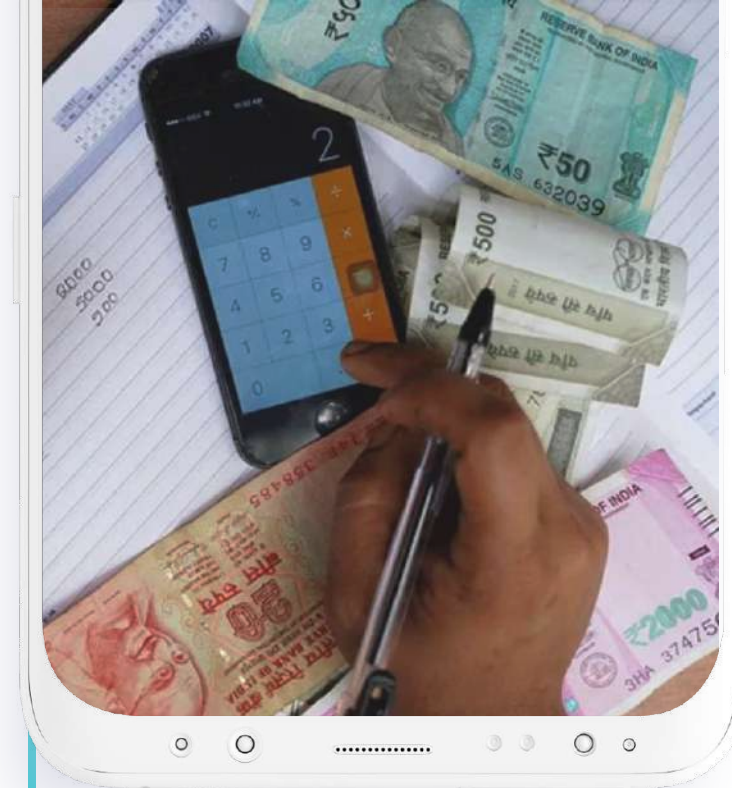
Technology enables gig economy to match and deliver **on-demand services** at scale



Expectations of Employers



Verified employees with good credentials



Automated muster roll, wage registers and payout ensuring compliance

Hassle-free hiring and seamless onboarding



Ensuring customer service: Commitment to work and quality of output

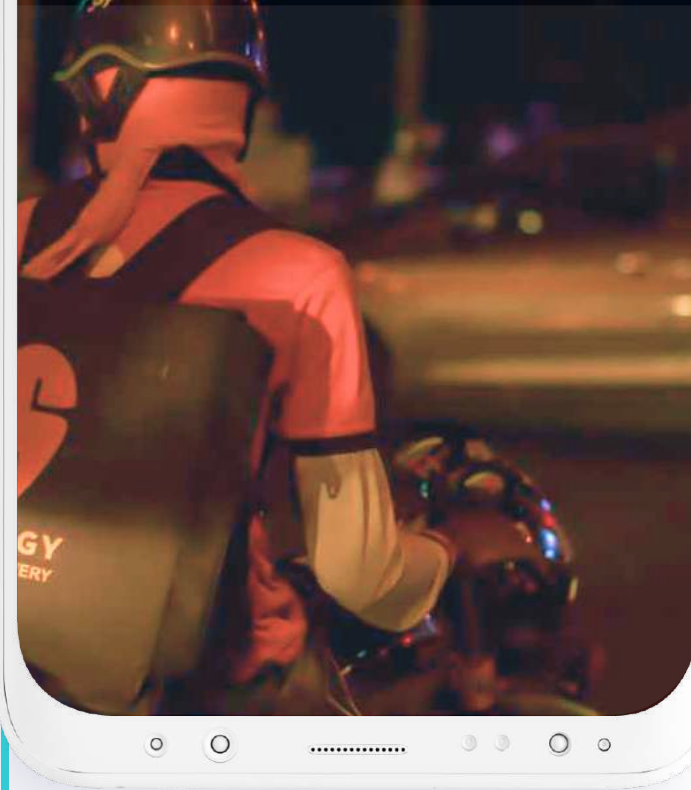


Source : BP Primary Research

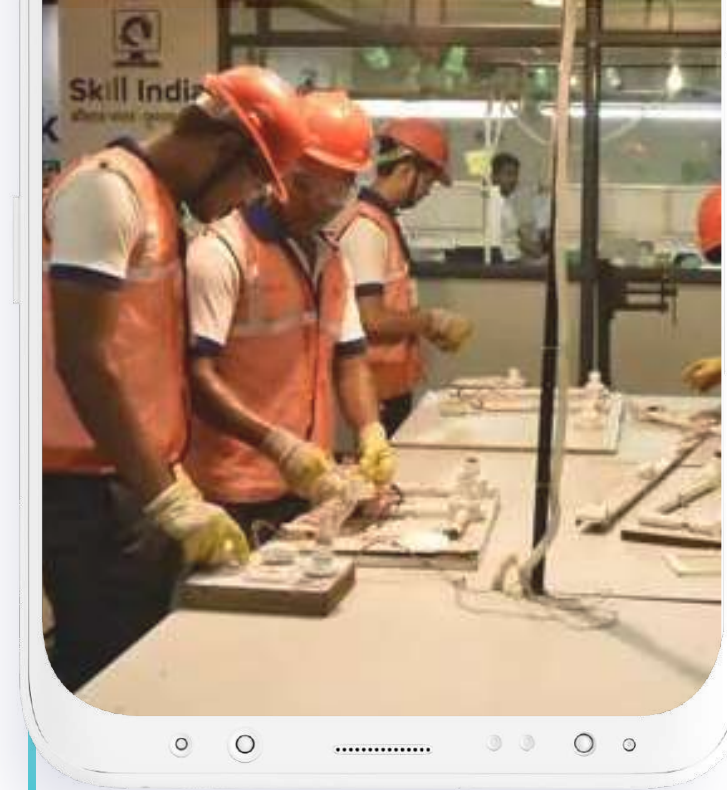
Availability on demand and repeatability over a longer period of time



Expectations of Employees

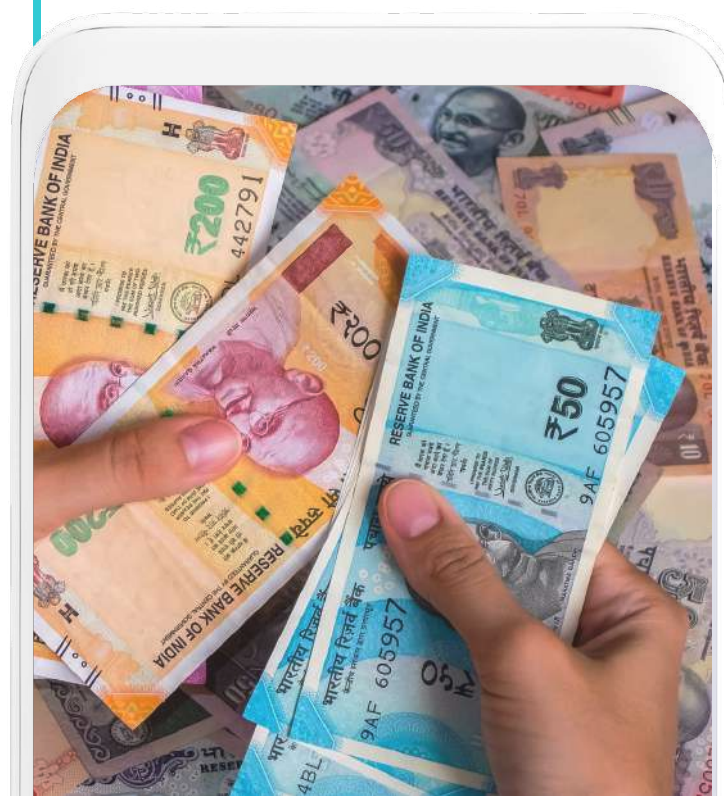


Flexible timings



Opportunity to learn and develop

Transparency with respect to payment, and commitment to pay on time



Provisions of other benefits



Source : BP Primary Research

Ancillary services - insurance, credit, etc



VIEWS OF INDUSTRY LEADERS

Being an employee-first organization, at Bisleri, employees' physical and mental well-being is very important for us. The COVID-19 safety measures taken by us helped our employees and their families get through this difficult situation together.

With the customer confidence in us, we are expanding to new cities and new business ventures and are continuously evaluating and hiring blue-collar employees. We are witnessing healthy demand and expect the situation to return to normalcy soon.

We feel proud to be part of an ecosystem that is generating a large number of blue-collar jobs during these difficult times.

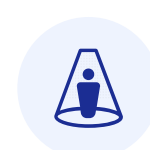
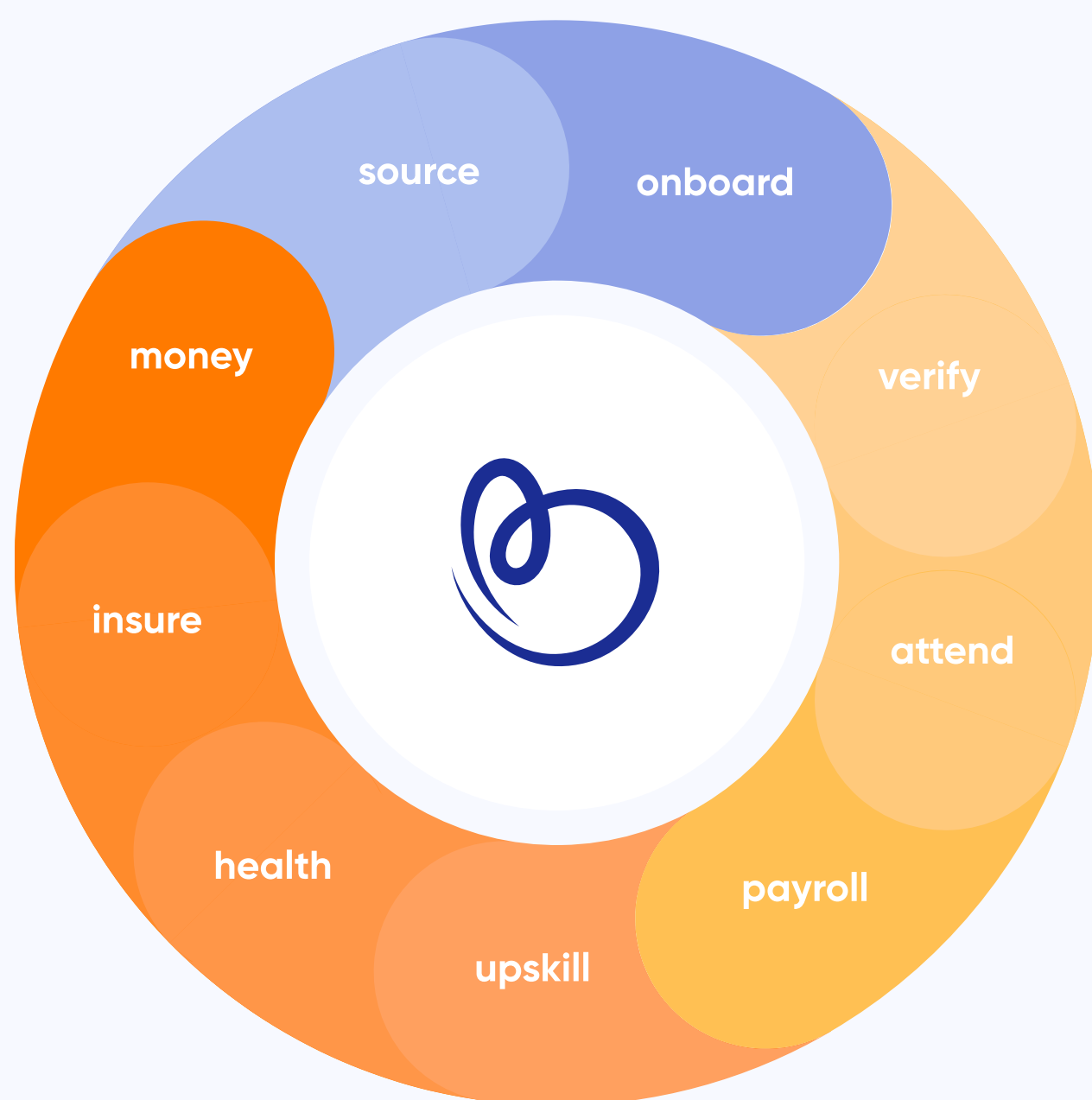


Swapnil Suresh Tulsankar
Head of HR, Bisleri



India's largest tech platform for blue-collar workforce management

enables employers to manage the entire life cycle of their blue-collar workforce with the vision of improving their livelihood



source

Hire skilled talent at scale with speed.



onboard

Put talent to work in no time with customized workflows. Omni-channel.



verify

Verify your employees with highest accuracy and speed.



attend

Do better with real-time insights on productivity, overtime and more



payroll

Automated and secure salary calculation and disbursal



upskill

Make learning fun, easy and an everyday thing with our chatbot based app



health

24x7 access to doctor over call, cashless insurance for the family and more



insure

Health and life insurances for employees



money

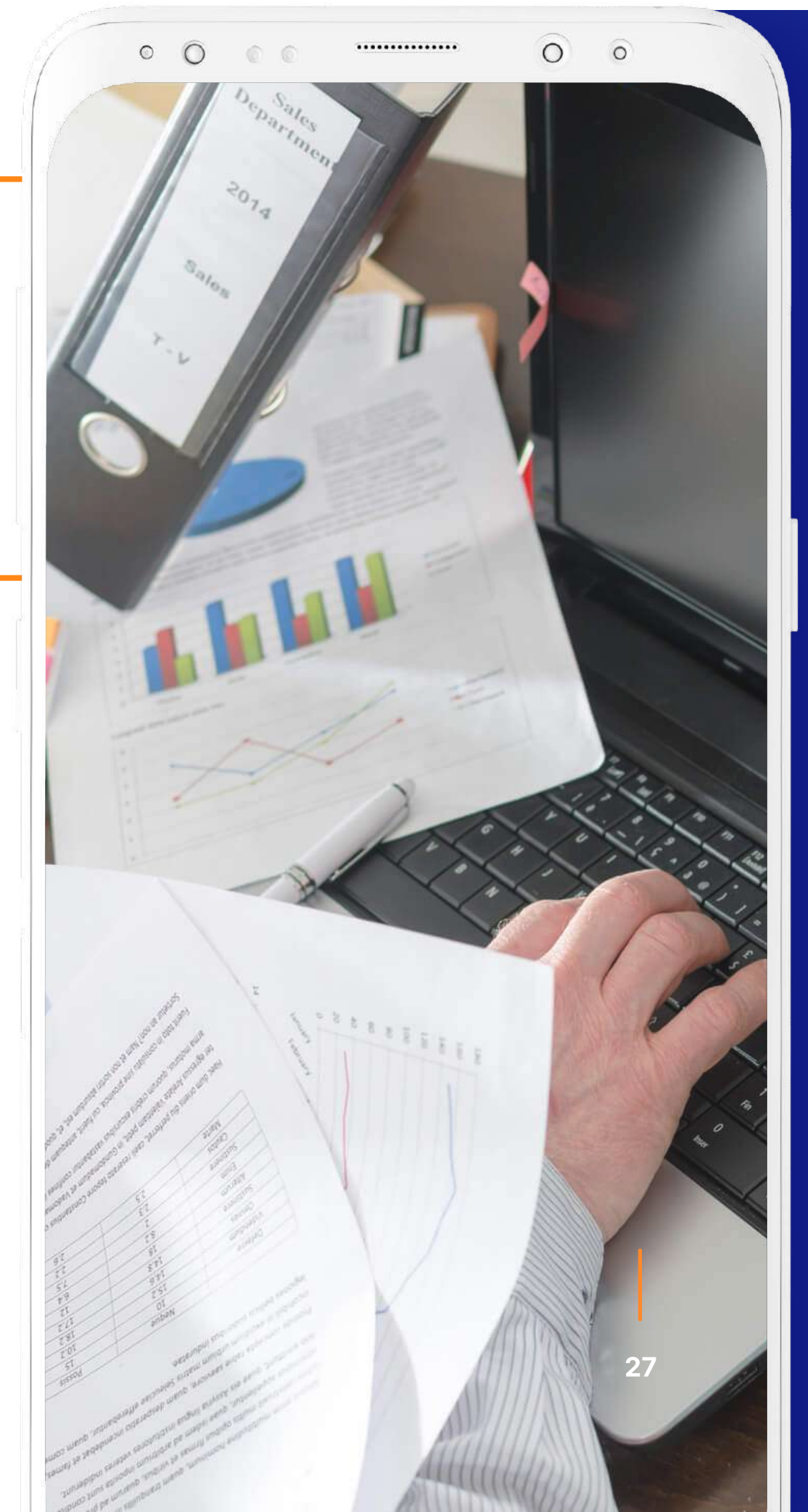
Go digital. Put a bank in your employee's pocket. Accessible 24x7

THE CHALLENGE

With 30,000+ employees spread across 25+ cities, a B2C company faced challenges with the manual processes to manage their frontline workers. These may lead to compliance issues, high risk of errors, wastage of time and resources.

Our Solution

- **A single platform** to view all the moving parts of their frontline workforce
- **A large pool** of hyperlocal candidates with instant match making
- **AI driven** searches and remote onboarding
- **Facial recognition** and **geofencing** technologies for attendance
- Faster and accurate **payroll calculation** ensuring compliance

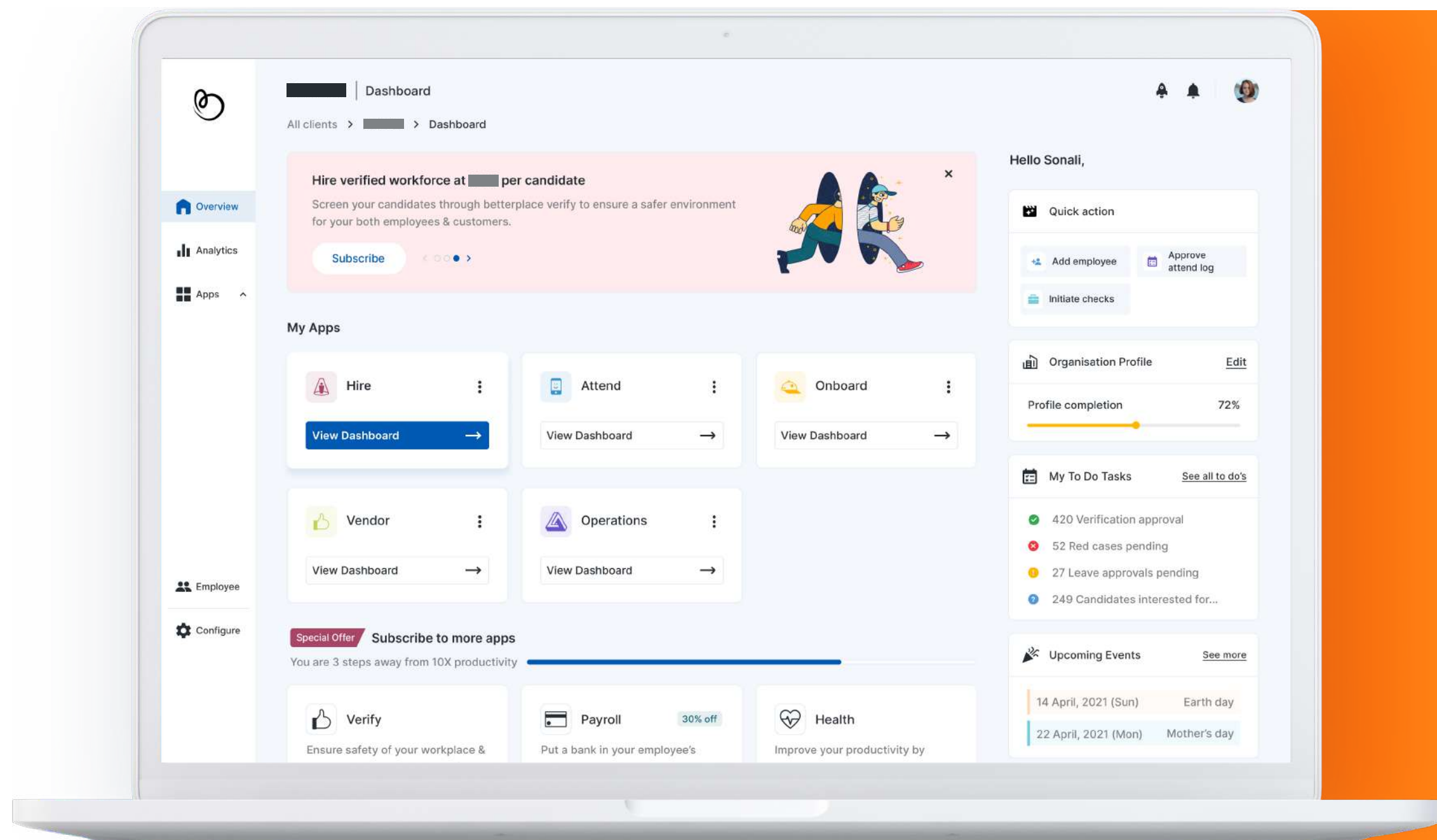


Benefits Gained

80%
savings in time

60%
savings in cost (direct and indirect)

100%
compliance with labour laws





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 enquiry@betterplace.co.in