

Strategic Workforce Planning for Indian Fashion Industry in the Era of Gig Economy

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Abstract— Employment generation and welfare of the employees is the key to the economy of any country. India is now the youngest and highest populated country of the world which is both the opportunity and challenge. The new generation workforce demonstrates changing attitude and standards in the way they prefer to work. This is also supported by the new digital age and employers' welcoming the change as it seems to be the win-win situation. This has introduced a concept of Gig Economy, where temporary and flexible jobs are commonplace and is a trend of independent contractors and freelancers instead of full-time employees. The phenomenon of working remotely is witnessed by all of us during the COVID-19 pandemic and corporates are moving forward to identify job roles which can be detached from workplace and be converted to either fully remote or hybrid mode. Fashion industry largely refers to the design, manufacturing, distribution, marketing, retailing, advertising, and promotion of all types of apparel. The industry has presence of manufacturing in entire value chain from fibre to apparel. The industry is the 2nd largest employment generator in India, after agriculture. Indian apparel industry's firm size distribution is skewed towards small firms. Any significant strategic intervention in this sector will have high impact on the overall economy of the country. This is the conceptual review paper highlighting the need for strategic workforce planning for Indian fashion industry to be globally competitive in the wake of emerging gig economy.

Index Terms- Indian Fashion Industry, Gig Economy, Flexible workforce, Work life Balance, Strategic Workforce planning, Women in workforce

I. INTRODUCTION

Robin Chase, an American Entrepreneur once said "My father had one job in his life, I've had six in mine, my kids will have six at the same time". Welcome to the world of Gig Economy (Adams, 2018).

"The Future of Work is Anywhere: Gig Workforce, 2019" defines Gig economy as a labour market, where

short term contract or freelance work is prevalent over permanent jobs and recognises that the gig economy is becoming key constituent in talent search (ILO-USA, 2018). The Bureau of Labor Statistics in 2017 reported having 55 million gig workers in USA, accounting approximately 34% of its labour force (Statista, 2021). The survey done by MasterCard, published in May 2019, reported the gross volume generated by global gig economy was \$204B in 2018 and is expected to grow to \$455B by 2025, at the CAGR of 17%. As per economic Survey 20-21, by Economic Times of India, the India's gig economy is now largest in the world. Organizations, which can identify various job roles in their organizations, which can be performed by gig workers, will be able to hire good talent irrespective of location, leveraging domain expertise and not compromising on missing skills and experience locally available. As per Intuit Report 2020; about twenty trends that will shape the next decade, visualised the world where companies motivate and manage employees who never set foot in their corporate office. The report predicted the work shift from full time to free agent employment as one of the mega trends, which is becoming true today, especially after the pandemic.

The newly formed law "The Code on Social Security 2020" published on 28th September, 2020 by Ministry of Law and Justice, Govt. of India also recognizes the gig worker and platform worker for the first time in India. The budget 2021, announced India's gig economy workers to get social security for the first time (India's Gig Economy Workers to Get Social Security for the First Time, 2021).

The industry at large in its current state is identifying various job roles, which can be detached from workplace and be converted to fully remote or hybrid

mode. The year 2020, which forced all of us to work remotely, was a damage control mechanism. But now, if the companies are looking forward to remote and flexible workforce, the needed eco-system is to be developed. The industry is also optimistic with the new Social Security Code, which has defined the gig workers and brought them under the gamut of labour workforce.

A conceptual framework derived from the existing literature review is presented below.

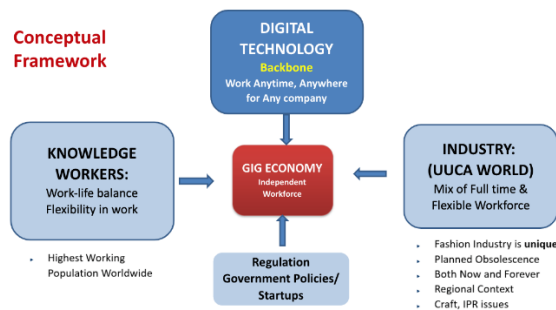


Figure 1: Conceptual Framework

II. DISCUSSIONS

Gig Economy: The current Scenario

The ‘gig’ in the term ‘Gig Economy’ refers to the short-term work arrangements. (Woodcock & Graham, 2020, pp. 1–3) refers Gig Economy as labour markets, which are characterised by independent contracting which happens through, via or on digital platforms. This is also known as ‘independent contracting’, ‘freelancing’ or ‘temporary work’.

According to the Code on Social Security law of India, the “gig worker” means a person who performs work or participates in work arrangements and earns from such activities outside of traditional employer-employee relationships. The law also recognises “home based worker”.

("Different Types of Workers: Employees, Contractors & More | QuickBooks", 2021) enumerates types of workers as full-time employees, part time employees, temporary employees, at-will employees, and independent contractors. The freelance workers are the workers hired as independent contractors. The

freelancers work on multiple projects at any given point of time, and it is their primary source of income. Freelancers also may have other traditional jobs and work as independent worker as a side hustle for income top-up. Some opt for freelancing in the event of job loss, or also as a hobby.

(MGI, 2016) defines independent worker as the one who possess high degree of autonomy at work, receive payment by assignment, and have a contract less than 12 months, if any. As per a study carried out by Deloitte, 2018, 66% of the millennial surveyed were expected to leave their organizations and work independently in near future.

The independent workers, who source work online through a platform, are also known as platform workers and the arrangement is called “Platform Economy”. This is the Internet supported infrastructure which involves use of Artificial Intelligence and Machine Learning. This is the business model which involves three parties, the consumers, the providers and the platform itself (Parthasarathy, 2020). The platforms are web based allowing to work for anyone, from anywhere and anytime, for example freelancer.com. The other type of platform is location based where the actual work is to be carried out in specific geographic location, for example uber.com or urbancompany.com

It is difficult to measure the size of the gig economy, considering its nature of being unorganised labour, 20-30% of the workforce in the US and EU-15 countries is involved in the gig economy (McKinsey 2019). That’s a total of 162 million working-age people across the US and the EU-15 countries engaged in some sort of non-traditional work.

(Western Governors University, 2018) The advantages to the workers of gig economy are flexibility and independence, whereas the pay is both the advantage and disadvantage. No benefits, lack of organization holding environment, and work breaks are disadvantages to workers. On the other hand, for the businesses, the low cost, scalability, and access to diverse talent pool of flexible workforce are the advantages. The reliability is the major con to the businesses employing gig workers.

(Poon, 2018) has noted the reasons for growth of independent workforce. On supply side, it is the trait of millennial for valuing the availability of healthy work-life balance, flexible work hours, vacation, personal time and the appreciation of their needs as a person. On the demand side, it's increasing awareness in corporate leaders that hiring freelancers and independent workers wisely is more productive option in handling changes and uncertainties. The rapid advancement of technology has enabled people to work anytime, anywhere, for any company. Platforms like freelancer, upWork, TaskRabbit, Fiverr are becoming increasingly popular. This study has outlined the need for examining the rights and responsibilities and terms and conditions of work given to independent workers whose increasing importance should not be ignored.

Future workforce report 2019 by Upwork, has noted how millennial and GenZ managers are shaping the future. These are the people who are going to be workforce majority by 2028 as 58%. According to the report, remote work is a new normal for these generations and adaptation of freelance independent work and flexible teams are increasing. These were the data reported pre-pandemic. The Upwork Q4 2020 pulse survey reports that at least 56.8 percent of Americans are still working remotely and finds it better than their expectations in terms of reduction of non-essential meetings, increased scheduled flexibility, no commute, less distraction from the office, and greater autonomy. These are the benefits to both businesses and professionals. Looking forward into future, managers expect 22.9 percent of workers will still be working remotely, which is almost double the number prior COVID-19 pandemic, which was 12.3%. The Upwork platform witnessed significant increase in the demand for engaging remote freelancers during this time too.

The millennial has already adapted to the work and workplace in this digital era, and GenZ is about to join the workforce soon. This inspires to study the traits of GenZ related to work and workplace.

(Miller, 2018) summarizes the attributes of GenZ. GenZ is entrepreneurial, connected, financially focused. When choosing a job, they look for good salary, enjoyable work environment, flexible

schedule, opportunity to create new products, chance to learn new skills, and community focus. They prefer to work independently. They are diverse and they embrace change. They want a voice. The potential of burnout is so high amongst these overachievers, that emphasis on fun and breaks into work, and providing healthy escapes becomes mandatory. There is very high probability that the trend set by millennial will see upward shift with this new generation as well.

The iLabour Project at Oxford Internet Institute, University of Oxford investigates the construction of labour markets, institutions and movements on Internet. The project suggests that the labour markets are in the midst of dramatic transformation, as the traditional standard employment is increasingly supplemented and substituted by gig work (Introducing the ILabour Project).

According to online Labour Index, measured by iLabour Project, India is the fifth largest country hiring gig workers. Though the difference between numbers of United States the top hiring country and India is vast, it suggests good opportunity for Indian gig workers. India provides the highest numbers of workers in Gig Economy (34%). The software development and technology, creative and multimedia, sales and marketing support, writing and translation and data entry are the top five occupations. (Ruyter, Brown & Burgess, 2019) This paper studied conceptual and regulatory challenges in the fourth industrial revolution and its impact on Gig work. It predicted three changes associated with fourth industrial revolution. First, the change in composition and skillset of workforce, second the very nature of work and workplace, third the regulatory, as the work becomes 'invisible' there are both optimistic and pessimistic scenario. The study suggested that there is little systematic evidence of the impact of technology on workplace and much of the research is based on anecdotes and speculations. Early applications of technology in the case of gig work are not a problem but how it is applied is a matter of concern. Despite large investments in tertiary education in developed and developing economies, the problem of unemployment and underemployment and long transition periods from graduation to regular employment is also boosting the gig economy and

suggests the evidence that the gig workers are predominantly young workers.

(Khetarpal, 2017) India is the second country after US, where freelance work is on the rise. The most popular freelance work in India at present is web and graphic design, content writing, translation, internet marketing, recruitment, branding and legal services. Organizations are realising the need for working with 'face-less' people and clear guidelines with specific goals are to be communicated clearly, while the work is outsourced.

(Zaczkiewicz, 2019) "Fashion Hiring Will Be Fast, Digital and Diverse" – industry experts see data and AI reshaping hiring processes. The AI is very widely used in recruitment processes worldwide. The study suggests that the future hiring in retail and fashion industry to align with "digital-first" approach. It also suggests that there are more jobs available than the takers, but there is disconnect between the location and skills requirements. The technological platforms have wider role to play here. The survey describes artificial intelligence as a bold disruptor, which is helping companies save time, remove human bias, and deliver the best candidate matches. AI is helpful while sourcing candidates, screening and nurturing. Looking at the pace of change and innovation in fashion/retail/beauty industry, the industry attracts significant number of best and brightest people at entry level, as this sector promises good career options.

Every organization provides holding environment to its regular full time employees. These holding environments help employees manage their broad range of emotions, which are part of work life. Such environments also give context to one's professional life and development. (Petriglieri, Ashford & Wrzesniewski, 2018) notes in their study that in absence of an organizational holding environment, which renders work and work identity of the worker precarious, also creates the opportunity to personalise them. In gig economy, working, rather than belonging becomes the main avenue for workers to define themselves, productivity becomes the foundation of their identity.

An Indian Scenario: Fashion Industry

As per Investindia.gov.in Textile India Report, 2019-20, the industry has presence of manufacturing in entire value chain from fibre to apparel. The Industry is the 2nd largest employment generator in India, after agriculture (45 Mn direct jobs), Contributing 7% of the country's manufacturing production, 2.3% of the GDP and 13% of country's export earnings.

The FDI in the textiles and apparel industry has reached up to \$3.45BN during 2020. The exports in the textiles and apparel industry are expected to reach \$300BN by 2025. To reach this ambitions target of double the industry size, Govt. of India is aggressively setting up 7 mega textile parks, 8 centers of excellence to promote technical textiles, and 11 focus incubation centers.

The growth drivers for the expansion of Indian fashion industry are many. The industry has presence in the complete value chain from fibre to fashion. The raw material availability, India being largest producer of cotton, second largest producer of polyester and silk, third largest producer of viscose and fourth largest producer of acrylic and nylon. The availability of manpower is another big growth driver, as 62% of the current Indian population is in the working age group. The Government has come up with the schemes to generate skilled workforce for the sector through:

1. Integrated Skill Development Scheme for the Textiles and Apparel Sector (ISDS),
2. Samarth (Scheme for Capacity Building In Textile Sector)

One of the key focus areas in the textile and apparel sector is Handlooms and Handicrafts, Global brands can handhold local producers for creating luxury handlooms and High-end Finished Products, where the country aims to increase its global trade share in the manufacturing of finished goods categories such as suits, women's western wear, intimate wear, swimwear, and outerwear.

("Insights into working conditions in India's garment industry", 2021) The report by ILO notes that the labour is critical resource to Indian apparel industry's competitiveness and long-term viability. As the economic environment is continuously changing, worker's skills upgradation and productivity,

attracting and retaining right mix of talent, domestic labour laws, and worker's living conditions are critical factors. The garment industry faces multiple issues related to labour including long hours, forced overtime, and low wages.

(Hasan, Kapoor, Mehta & Sundaram, 2017) Indian apparel industry's firm size distribution is skewed towards small firms. It is practically very challenging for these small firms to adopt modern production and management technologies, resulting into India's relative under performance in the sector. The labour treatment by informal/small firms and formal/large firms are very different on various compensation parameters. Factory's act, Contract Labour Act, and Industrial Dispute Act primarily govern the employer's decision on recruiting labours. As the apparel industry has fluctuating demand of labour owing to changing fashion and seasonality, quick response to be able to adjust the employment levels and work arrangements is a key to success.

(Tigari & Aishwarya, 2020) In India, the Self-Help-Group scheme is implemented by NABARD (National Bank for Agriculture and Rural Development), to empower rural and semi-urban people to improve their living conditions. These groups are more successful with rural women. (Das, 2013) in his article "It's brand 'SHG' in textiles" has noted how many SHG's are contributing to Indian fashion industry by marketing their own brands to various retailers. (Malhotra, n.d.) has noted various models of self-help groups as linkage model, modified linkage model, NGO model, Modified NGO model, Indirect NGO model, IFAD model, SGSY model (Swarnjayanti Gram Swarozgar Yojana), SHPI model (Self Help Group Promoting Institution). The SHG scheme is crucial linkage between the rural workers practicing the traditional art and craft based products and the formal manufacturing and retail sector in fashion industry.

Gig Economy in India

(Ghosh, 2020, pp. 1) in his book, "Gig Economy in India Rising (Gen X-Millennial-Z)" notes that the rapid evolution in the gig economy suggests that this is the greatest prospect of work for the future.

The National Conference on "Gig Economy" on January 24, 2020 organised by ASSOCHAM, noted that India's Gig Economy is Set To Hit \$455 Billion By 2023.

On September 19, 2020 The Economic Times run the cover story titled "The Gig Factor". The article narrated the rising gig economy in India and tried to draw some inferences pre and during COVID-19 era. The report presented the analysis of the survey of Gig Workers in India, done in partnership of Awign. The four big shifts emerged from the analysis are: the freelance work has emerged as outlier, witnessing big growth, all types of blue-grey-white collar workers are working as freelancers, with the adoption of "Work from Home" and the financial uncertainty, large firms are opening up to fill crucial posts with gig workers, and both start-ups and Government are acknowledging the growing trend. The main pain point derived from the analysis is the need for better policy on payment and employment terms.

The Code on Social Security has now recognised "gig workers", "platform workers" and "Home workers" for the first time in India. As per the clause 78 of the law:

"social security means the measures of protection afforded to employees, unorganised workers, gig workers and platform workers to ensure access to health care and to provide income security, particularly in cases of old age, unemployment, sickness, invalidity, work injury, maternity or loss of a breadwinner by means of rights conferred on them and schemes framed, under this Code".

Hence, the government has already recognised the emerging gig economy in country and has started addressing the inherent issues. The chapter IX of the law is dedicated to "SOCIAL SECURITY FOR UNORGANISED WORKERS, GIG WORKERS AND PLATFORM WORKERS". This is the big encouragement for both the workers and employers of gig economy and may witness big shift in the working patterns in years to come.

As per the Freelancer.com, a global platform data, India is the top country by freelancer user base with 11.2 million subscribers. Top Indian cities by user

base are New Delhi, Pune, Chennai, Hyderabad and Bengaluru. These cities are the clusters of IT domain experts and it's not surprising to note that the most popular project types awarded to India are PHP (Hypertext Processor), Graphic Design, Website Design, HTML and WordPress Design.

("Professional Gig Economy: The New Age of Work", 2018) Organizations in India are starting to leverage flexible talent; however key enablers need to be in place for this to scale. Professionals and corporates in India are adopting the 'new way of working'— the gig economy in India has the potential to grow up to \$20-30 billion by 2025. Freelancing can meaningfully help women as a viable career option, especially as they look to stay engaged in the workforce while retaining flexibility. For the less educated workforce, Ola, Uber, Grab, Swiggy, FoodPanda, Amazon, Flipkart, UrbanClap are the famous platforms in India. Though the companies are revising their manpower planning which includes gig worker at mid-senior level.

("India's Top Tier Freelancers- What They Earn", 2017) This report summarises that the independent working is going to be one of the biggest megatrends of the century, however freelancers globally do not have an organized way to determine what to charge. 70% of independent consultant bank on what client quote. There are no specific norms and even salary benchmarking sites like Glassdoor and Pay Scale do not have adequate data for benchmarking. As per the report, Indian freelancing eco-system is dominated by Delhi/NCR, Mumbai and Bengaluru. Two third of Indian freelancers are Men. Freelancers range from 0 to 20+ years of experience. Majority of the projects are part time, remote and less than 6 months long, which indicates noticeable shift towards flexibility. The study noted that the Gig economy in India values experience, and pay-outs keep on increasing with experience. There is visible gender pay gap at higher experience levels, and unorganized nature of gig economy further aggravates the problem.

(Kathuria et al., 2017) The report published by "Indian Council for Research on International Economic Relations" has enumerated 50 digital platforms worldwide, out of which 26 are India based. These platforms serve the generic purpose of freelancing and not domain specific, making the market very crowded

and increasing the complexities of connecting with right sources.

Another area to look into related to workforce is the participation of women, as it is reported less than one-quarter (20.3%) of women in working age group participate in labour force as of 2020, compared to 76.6% of men (Labor Force Participation Rate, Female (% of Female Population Ages 15+) (Modeled ILO Estimate) - India | Data, 2021).

(Gohain, 2019) has noted the women in higher education show steady rise in India. Women comfortably outnumber men among those graduating at UG, PG, PG Diploma, MPhil level. The number of female students in premier fashion institutes like NIFT outnumbers the male students.

(Ratho, 2020) Aditi Ratho, in her paper "Promoting female participation in urban India's labour force" identifies one of the key factors for low labour force participation by women in India as lack of flexible work offering. (Woetzel et al., 2019), The study published by McKinsey Global Institute suggests that Increasing women's labour force participation by 10 percentage points could add \$770 billion to India's GDP by 2025. The Gig work shows great opportunity in this area also.

CONCLUSION

Despite large investments in tertiary education in country, the problem of unemployment and underemployment and long transition periods from graduation to regular employment remains the burning problem. The higher participation of educated women in workforce also remains the challenge.

There are more jobs available than the takers, but there is disconnect between the location and skills requirements. The technology has good role to play here to bridge this gap.

It is visible that the gig economy is here to stay and will see remarkable growth in future both worldwide and in India. The gig economy is aligned with the mind-sets of GenZ and millennial work ethos, helps companies plan their human resource requirements in much more flexible way in this VUCA (Volatile,

Uncertain, Complex, Ambiguous) world, and is supported well with the technology and digital connectivity.

Fashion industry is ever fluid and changing. The only constant factor with fashion is change. The Fashion business in India can benefit through balanced structure of full time and flexible workforce, considering its cyclic and seasonal nature. This will have great impact on the economy, as Textiles and Apparel being the second largest sector of employment in the Country.

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