



taggd.

By  PeopleStrong®

PRESENTS

DECODING JOBS 2019

SECTORAL DOSSIER
E-COMMERCE

IN COLLABORATION WITH

Wheebbox
Measuring World's Talent



#IndiaSkillsReport2020

INTRODUCTION

The e-Commerce industry (both B2B and B2C) is scaling new heights in India. 20 years in the making, this space has seen a lot of action, with massively growing startups, IPOs, MandAs, huge investor action as well as shutdowns and hiccups. With all this however, it has changed the way we not only buy, but how we live, communicate, eat, love and heal . It has been at the epicenter of innovation and disruption in several industries, such as retail, finance, education, health, travel, hospitality and food. According to a study, at present the sector employs about 10 million people and is expected to create 12 million jobs by 2022.

E-COMMERCE SECTOR EMPLOYS ABOUT

3 MILLION

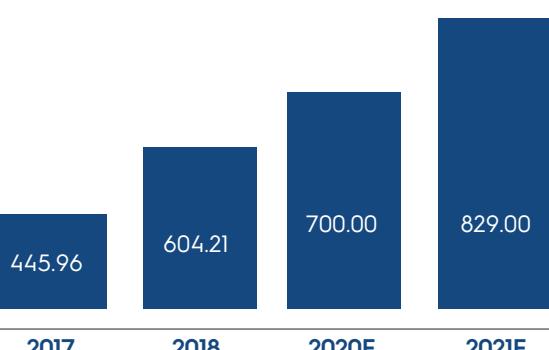
EXPECTED TO CREATE

12 MILLION

Jobs by 2022

At the base of this sprawling success achieved by the sector is the ever-growing internet user base in India, which is expected to increase to about 830 million by 2021 from the current about 640 million. The growth is mainly expected to be derived from the rural areas where mobile data is successfully bringing people to the internet map.

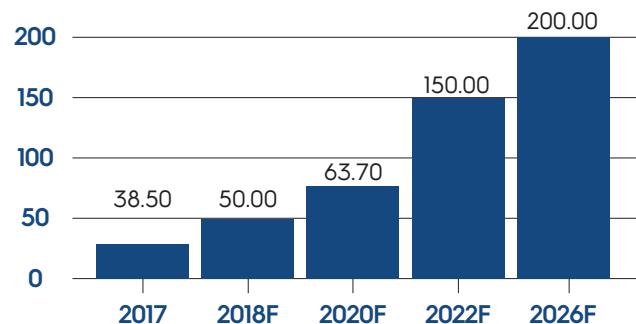
Internet Users In India (mn)



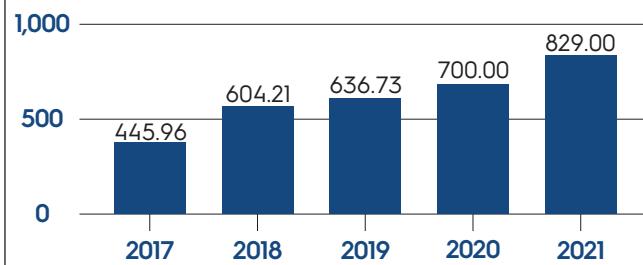
Note: F- Forecast, Q2 2018- As of June 2018

India's Internet economy is expected to reach \$250 Bn majorly backed by eCommerce. India's eCommerce industry (fastest growing in the world) itself is slated to surpass US's by 2034 and become the second largest in the world by 2034.

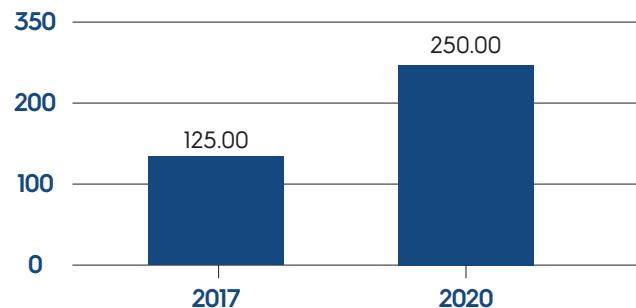
Internet E-Commerce Market (US\$ billion)



Internet Users in India (million)



India's Internet Economy (US\$ billion)



ENCOURAGING ENTREPRENEURSHIP

The investment scenario for the e-Commerce industry has been extremely encouraging over the past few years. The E-commerce and consumer internet companies have raised more than USD 7 billion in funding (including the venture debt) in 2018 out of which USD 5.9 billion was invested in early stage capital and USD 1.3 billion was invested in expansion / growth capital. Start-ups like Zomato, OYO, Swiggy, Byju's, PayTm Mall, Pine Labs, Udaan, PolicyBazaar and CureFit have collectively raised a lion's share (\$4.6 billion in 2018) of the total investments into this segment.

While there is Venture money chasing good startups, lately, investors have also started emphasizing businesses to focus on Bottom Line along with Top Line. Its no longer just about scale-up in user base, but an increased focus on building self-sustainable, long term business. The next couple of years will be the litmus test for the e-Commerce industry. The question is which e-Commerce players are going to succeed in not only grabbing market share, but also make their business model self-sustainable. With fingers crossed, it will be this sector that will create the next Reliance and TATA.

The e-Commerce sector is expected to reach \$200 Bn by 2027 and is a significant avenue to provide employment and build micro entrepreneurship in the country.

ECOMMERCE SECTOR IS EXPECTED TO REACH **\$200 BILLION BY 2027**

IN 2018, 7 COMPANIES IN THE SECTOR ACHIEVED UNICORN STATUS

zomato



policybazaar.com
Compare. Buy. Save.

digital
UDAAN

freshworks

oYO



Further, the Digital India initiative by the Government of India is aiming to create a \$5 Trillion economy by 2025. Favorable FDI policy is attracting key players, thus driving the growth of the industry and creating direct and indirect jobs in the sector. Overall, the growth impact of this industry is quite formidably evident in the job market.

GOVERNMENT INITIATIVES



Digital India

#startuPINDIA



Start Up India

Digital Udaan



We are not only gung-ho about this sector because of the government policies, but the sector's overall potential. With all the action in the e-Commerce sector, we have just reached half-way into this journey.

INDIA'S INTERNET PENETRATION IS ABOUT

48%



WITH MORE THAN **3/4th** OF RURAL INDIA YET TO BE TAPPED

India's online retail market is 5% of the overall Retail (For US, this is estimated to be ~11% in 2019) and growing. With our 130 Crore population, there is still a huge growth potential staring at us.

INDIA'S ONLINE RETAIL MARKET IS

5% OF THE OVERALL RETAIL



EXPLORING ADVANCED TECH AND THE RELEVANT TALENT

With new technologies and innovations, the industry is breaking new barriers and exploring newer horizons. For instance, AI, ML, Analytics and Blockchain are being used to enhance and personalize customer experience by mapping customer needs, preferences and trends, and thus streamlining the services and inventory real-time accordingly. We are truly seeing an advent of 'Me-Commerce' where the technology knows 'Me' exactly and customizes the experience for 'Me' rather than a segment of people 'like' Me. We are entering an era where digital is going to be so intertwined with our lives that it becomes a natural extension of an enhanced, more fulfilled living.

To work on these technologies and support the business, the companies are expecting job aspirants to be technically sound as well as possess strong analytical and cognitive skills and positive learning behavior. However, most new-age companies / startups find it hard to fill positions due to a lack of skilled talent. Indian startups are hunting for talent in Artificial Intelligence, Machine Learning, robotics, and Big Data across the world to overcome a big demand-supply mismatch for talent with knowledge of futuristic technologies.

In data science itself, the country is projected to face a demand-supply gap of two lakh data analytics professionals by 2020. Moreover, considering governmental policies like Srikrishna Committee's draft data protection bill, Indian eCommerce companies are looking to hire skilled technology professionals to handle data privacy concerns. In lieu of this, there will be 3.5 million unfilled cybersecurity jobs by 2021. It is further possible that even after acquiring talent and upskilling workforce, India would have a shortage of 1.8 million cybersecurity engineers by 2022.

INDIA WOULD HAVE A SHORTAGE OF

1.8 MILLION
CYBERSECURITY ENGINEERS
BY 2022



ATTITUDE A DETERRENT

Apart from technical skills, the industry is also observing candidates drifting away from the tasks that require extensive travel and door-to-door customer interactions. The employees and job aspirants perceive that these jobs do not add value to their personal well-being. These are the areas which require attention from the industry, government and academia alike.

Will we see robots, drones taking over some jobs in the sector? It is still way too early to predict, and only time will tell. Let us watch this space and talk about it in our next ISR.

LOGISTICS OUTSOURCING – NEW OPPORTUNITY

The e-Commerce sector is observing creation of many new job profiles in logistics, warehousing, web and app design, system integration, customer service, big data and machine learning, further leading to addition of jobs in the market. In the **logistics outsourcing** business, mainly driven by the ecommerce companies, it is estimated that 1 million new jobs will be generated. Skills like good communication, analytical and planning skills, negotiating and problem-solving skills and IT skills would be crucial in the future. The most-in-demand work profiles in this segment would include **fleet managers, warehouse managers, loading supervisors, and seafarers**.



Interestingly, about 43% of these jobs will be in tier-two and tier-three cities as well as rural areas, making the employment opportunities reach every corner of the country, implying that skills development efforts will need to be robust enough in their reach.

ABOUT 43% OF THESE JOBS WILL BE 
IN TIER-TWO AND TIER-THREE CITIES AS WELL AS RURAL AREAS

Additionally, when talking about the skills required across industry, technical skills like coding, analytics, SEO, reasoning, persuasive skills, team management, people and time management to name a few, will be crucial. There needs to be a focus on developing and including these skills in the school and college curriculum itself.

FLEXI STAFFING ON RISE

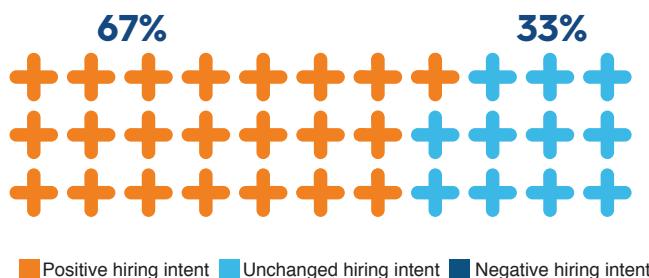
The e-Commerce industry is a highly seasonal business where consumers are most active during the sale period or festive seasons. To meet the sudden rise in consumer demands during such peak seasons, aggressive hiring happens for job roles like Delivery personnel and Support functions, Supply chain and Logistics operations.



E-COMMERCE HIRING INTENT & TRENDS 2020



The hiring intent survey of the India Skills Report 2020 was taken by over 150 employers, out of which 11% constituted leaders from the e-Commerce industry. In line with the upbeat economic trend and forecast for this industry, 67% of employers expressed a positive outlook on hiring in 2020. Positive trends were seen due to venture funding in start-up companies and their mammoth expansion plans across India and South East Asian countries.

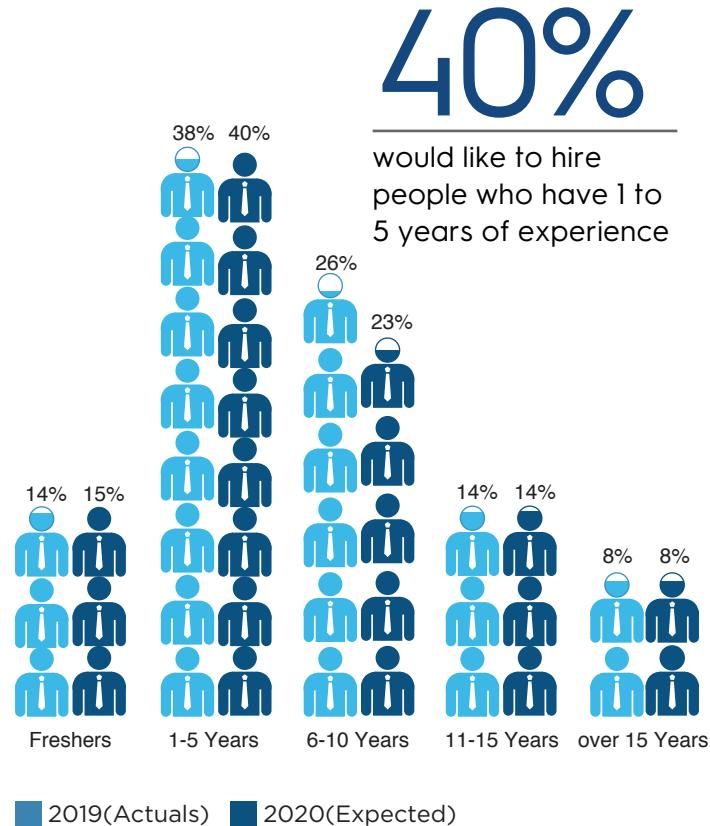


67% respondents show positive intent on hiring in 2020

HIRING INTENT BY WORK EXPERIENCE

Around 40% of the surveyed employers said that they would like to hire people with experience ranging between 1 to 5 years. About 23% said that they would like to hire people with 6-10 years of experience and for 5 years above the total is 45% to join their team. While the trends in the experience range between 1 to 5 years saw a slight notch increase in the hiring intent for 2020 as compared to 2019, overall the hiring intent for experiences ranging over 5 years saw a slight dip. However, for technology roles, this number will experience a slight increase next year. The e-Commerce industry by large though, continued to grow talent from within for mid and senior management roles, while continuing to hire freshers / 1 to 5 years experienced graduates in field sales roles and talent with more than a year's experience in Technology and Operation roles.

Only 15% say they would like to have freshers join their team, slight increase vs 2019

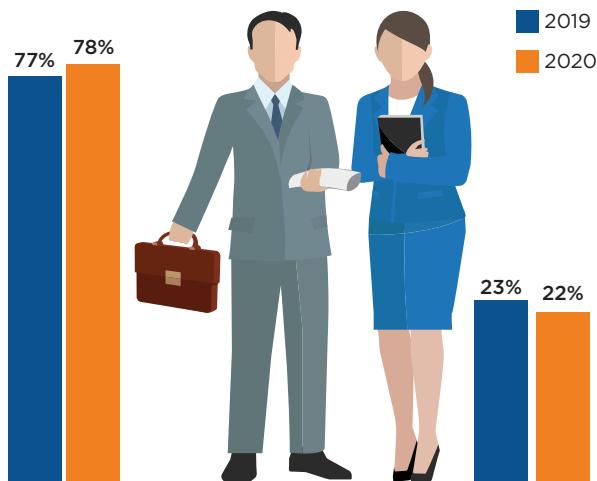


HIRING INTENT BY GENDER DIVERSITY

While the e-Commerce industry continues to retain its position as one of the strongest anchors in India's economic growth story, its story of gender inclusivity needs huge focus, as this sector is a natural fit for women aspirants especially in back end operational and management roles. In fact, the gender diversity for this sector has dropped one notch compared to last year, with its gender ratio hovering at 23 women to 77 people. Almost 30% to 45% of the workforce in the e-Commerce industry consists of their front-line workforce including sales, ops, supply chain etc. The role of the feet on street person in this industry requires managing relationships with restaurants, hoteliers, realtors, distributors, delivery agents and owners on ground and very often than not involves a lot of travel, odd hours, high sales targets etc. While this role might remain elusive to female talent in the country, huge strides can be made on coaching and training the woman workforce. We must now take decisive action. This starts with treating gender diversity with the business priority it deserves. Having said this, the story is not of all despair. Many leading e-Commerce players are holding their leaders accountable for female candidature participation in the hiring process, especially early in the pipeline when women are most overlooked. Many leading giants are taking special measures in providing a conducive work environment for women; However, a lot more still needs to be done in making the e-Commerce growth story in India more inclusive for women.

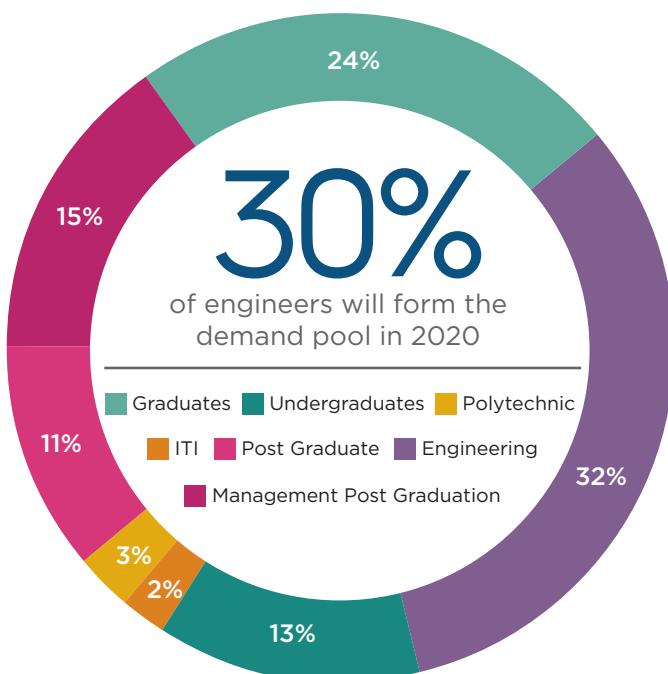
Gender parity remains a big concern at

78:22
(M:F ratio)



HIRING INTENT BY EDUCATION DOMAIN

While 60% of the demand pool in internet industry will be for their sales, operations and supply chain roles (consisting of undergraduates, graduates, post-graduates, ITIs and Polytechnics), 32% of the e-Commerce industry demand pool will be for engineering graduates. This will be mostly for their technology / application force. Many internet companies have chosen to train under-graduates too for entry level roles through in-house training programs, with this pool hovering at 13%.



HIRING INTENT BY SKILLS

Learning agility and adaptability continue to be the top skills in order of priority for hiring leaders in the e-Commerce space. This is more so because a lot of startup companies in this industry have a dire need to get the best quality feet on street talent for their sales, operations and supply chain roles. Interestingly, short psychometric tests were used for hiring of their feet on street force, to gauge a positive attitude in them. This is because many internet organizations suffer significant attrition in this role. Cultural fitment and the ability to persevere become a strong check point for hiring in this role.

HR leaders' most sought after skills in Internet sector include



HIRING INTENT BY JOBS

With the high usage of internet in India, the need for expertise in the field of social media marketing has become a big ask in internet companies. While technology / web development remains a top ask, artificial Intelligence and data analysis are key asks for understanding the consumer behavior and need. With the focus of internet operations on increasing agility, quality, ease and cost-efficiency, recent years have seen a growing demand of talent with IoT (internet of things) as a niche skill. The Internet of Things connects the environment, people, consumer, equipment and supply chains into a single work-flow system.

Upcoming Job areas in next 5 years



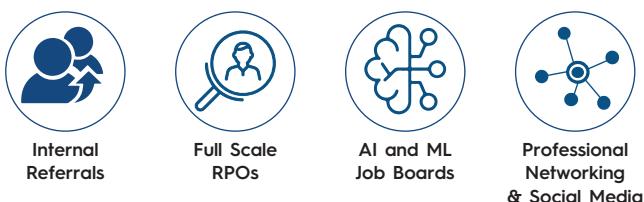
HIRING INTENT BY GEOGRAPHY



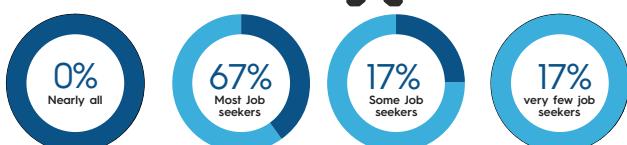
Most internet companies plan to expand Pan-India. However, looking at the base locations of these companies, the states of Karnataka, Maharashtra and Delhi (NCR and surrounding areas) remain the top employment destinations for internet talent in the country.

SOME KEY HIRING METRICS OBSERVED IN INDIA'S E-COMMERCE INDUSTRY SECTOR

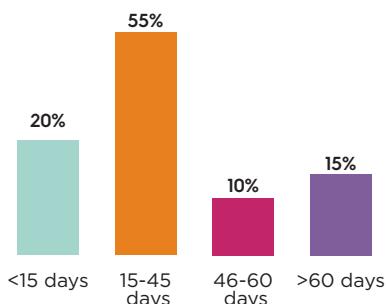
Professional networking and social media, Internal References and Full Scale RPOs (Recruitment Process Outsourcing) are observed to be the most used hiring channel



65%
e-Commerce industry corporates are satisfied with the most job seekers skills:

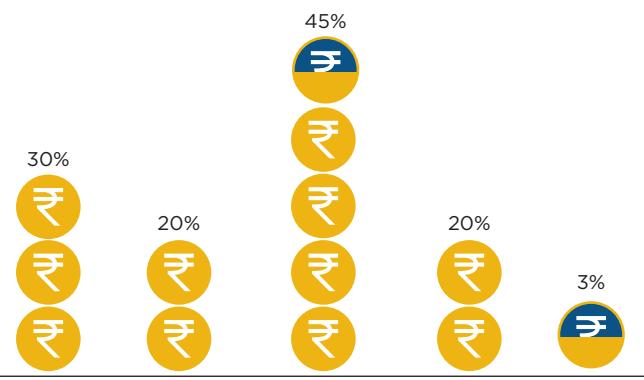


55% of respondents cite they close a vacancy in 15 to 45 days



45% of respondents cite average Hiring cost per hire may vary between

INR 31-40K



Gig-Workers

18-20%

Avg. Attrition Rate observed across the Internet Industry is

40-50%





WAY FORWARD

As the skills gap is pinching the industry, the government, academia and industry alike need to come together to bridge the gap.



COURSES TO STRENGTHEN TECHNICAL AND SOFT SKILLS

The use of technology-enabled solutions such as massive open online courses (MOOCs) can enhance the reach and quality of basic technical and vocational education. Also, partnering with ed-tech companies can prove beneficial in skilling new employees and reskilling existing employees. With crunching technology cycles and a massive change driven ecosystem, reskilling and upskilling should be an ongoing activity in any organization today.



JOINT PROGRAMS TO TARGET SPECIALIZED SKILLS

Functions such as logistics, analytics, pricing, inventory management, transportation, and last-mile delivery are unique and highly specialized. To address the skills gap in these areas, joint programs by the academia, private and government sector would be instrumental.



RAMP UP TALENT SEARCH IN ALTERNATIVE SECTORS

Government and Companies should set up counselling, mentoring and reskilling mechanisms to support laid off workforce to help them evolve them into freelancers, gig workers or entrepreneurs. Skilling programmes must be conducted on an ongoing basis and opportunities for purposeful apprenticeship and internship should be focused upon.

LEADERS SPEAK



“ The eCommerce Industry is, in a manner of speaking, not only at the forefront of the cutting-edge technology, but also, is leading in terms of latest innovation and disruption. Thus, three big skill sets that one can forecast relate to Data Sciences, Artificial Intelligence (AI) and Virtual Reality (VR). These skills are and will be used to virtually re-create new jobs, some of which, we don't even know what they will look like! Thus, the entire eComm space is undergoing transformation and will emerge stronger because of all the dramatic changes that we are creating! ”

India's education system needs a systematic review of the course curriculum, teaching methodology and the evaluation criteria. We need to invest heavily into teacher training and skilling them first before we talk about the students. Despite being a country with one of the largest English-speaking populations, India punches far below its weight in terms of world class research facilities, universities, Nobel prize winners and patent holders. The quality of high-end innovation and technology hubs also leaves a lot to be desired. Thus, a key component in India's growth story has to entail a 'knowledge revolution' that rests on a vibrant teacher : student community. ”

Faisal Nadeem Saiyed, Director - People Services, APAC, Expedia Group



“ Scholarships for employability and upskilling in emerging technologies is almost missing in India. We would urge industry, philanthropic organisations and high net-worth individuals to acknowledge its possible impact on talent landscape in future of work as well as recipients' lives. It's high time they come forward to support. ”

Gaurav Kumar, President- Corporate Development, UpGrad



“ The Internet Business continues to experience the employability gap, whereby the ideal fit to a role in view of the education comes up short. Some of the skills we experience a challenge with are Analytical Skills, Creativity, Problem Solving and Technology Skills. ”

Some of the new roles I foresee that will be in high demand in future in our industry will be in the space of Data Analytics, Cloud Computing, Cybersecurity, UI UX Designer, Legal and Compliance and People (HR) Professionals. The sought-after skills complementing these roles will be Coding, Technology Product understanding, Consumer Insights, Emotional Intelligence, Listening Skills and Legal expertise. ”

At Nykaa, we create a buddy system where a relatively new employee is paired with an existing employee who is proficient in the skills required. We constantly expose the individual to live assignments to allow the individual to work on the skills with guidance from proficient team members and if need be, we also hire a specialist. ”

Nirav Jagad, Chief People Officer , Nykaa.com



“

Our industry has tremendous scope, especially considering the current and anticipated market trends. Automation is the key to the future industries, and AI and ML will be the drivers in this transformation, which means there will be demand for skilled workforce in these domains. Companies need to be more agile in reaction to tech disruptions, as change is inevitable.

”

Saket Kumar Dwivedy, Head - Human Resources, UpGrad



“

The Indian economy has off late seen the advent of an entrepreneurial mindset and outlook. Talent from more mature / evolved industries could possibly struggle to make this transition. The future for survival will be cost consciousness and being frugal - it's not only about "burning" cash as we mature, as an industry (ref. e-commerce/online). Being boundary-less and having the ability to multi-task, being agile and adaptable - thinking beyond immediate work areas will be key behaviours that employers will seek in talent. All jobs will not always be structured. With technology being at the core of e-Comm, full stack development roles will be most sought after, not being confined to either front / back-end development. Data analytics and business intelligence will play a central role in awareness and accuracy to target right customer base. At Quikr, we have been hiring extensively from Campuses - both permanent & interns - and have been taking them through a structured learning journey across business verticals and roles to build a healthy pipeline. India will have to invest in programs that focus on bridging the gaps in having an entrepreneurial mindset. Unfortunately, most off the shelf and even customized development programs don't cover these unique aspects yet.

”

Sunil Moorjani, Head - Human Resources, Quikr



“

The technology industry is extremely dynamic with disruption and innovation becoming the norm. In order to stay competitive, responsive and relevant, organizations need to focus on recruiting not just talented employees who possess skills and expertise required for the job, but to gauge their ability to adapt and acquire new skills when needed. India's technical talent has been our biggest contribution to global innovation and in today's age of new technologies and automation, skill development becomes imperative. Digital technologies such as artificial intelligence (AI) and robotics are transforming the nature of work and the skills needed to thrive in today's evolving corporate landscape. Humans and machines will increasingly work together to drive productivity. As "old jobs" disappear and "new jobs" are created, the new jobs will require skills that facilitate collaboration with new age technologies. Therefore, focusing on skill development programmes which are based on advanced technologies like data science, artificial intelligence, blockchain, cloud computing, Internet of Things is the only way forward. At Uber, we constantly invest in our talent through various learning and development initiatives to improve technical capabilities and continually upgrade skill sets.

”

Vishpala Reddy, Regional HR Director & Head, Asia Pacific, Uber

ABOUT TEAM

taggd.

By  PeopleStrong

Taggd, a PeopleStrong recruitment solutions brand, is the largest Recruitment Process Outsourcing (RPO) provider from India with 100+ clients across 14+ sectors and is managing permanent recruitment for over half a million jobs. It combines the power of data and human knowledge to bring advanced talent acquisition and digital hiring solutions that change how businesses work and deliver. Over the last 13 years, Taggd has developed a deep industry understanding, digital recruitment expertise, talent network access, data intelligence and access to a robust tech stack to deliver business gains. Some of the leading enterprise customers of Taggd include Pfizer, Wipro, Honeywell, Mahindra, BirlaSoft, Tata Motors, Renault Nissan, Aditya Birla Health Insurance, Citi, IndiaMART, Swiggy, Oyo and Quikr, amongst other national and multinational brands. Nelson Hall, one of the leading global analyst firms, has rated Taggd amongst leaders in the RPO NEAT Matrix.

Taggd is the knowledge partner for the India Skills Report and conducts the "India Hiring Intent Survey (IHIS)" and the "Decoding Jobs : The Think Tank Series" across all major metros to take quantitative and qualitative insights from the academia and industry thought leaders on their views on the talent demand side.

Wheebox

Measuring World's Talent

Wheebox is India's leading online talent assessment company that partners with corporations for finding and retaining the best talent using validated, reliable and standardized tests for pre-hiring and learning needs. Wheebox benchmarks over 3 million users annually across the globe. In line with its vision to "Measure the World's Talent", Wheebox partners with many Fortune 500 corporations and hundreds of large and medium enterprises to power their hiring and competency development assessment needs. Wheebox also partners with thousands of higher and vocational educational institutions for conducting its proprietary "Wheebox National Employability Test (WNET)" for final year graduates and postgraduates to benchmark competencies that matter the most for being employable in corporations. Wheebox also powers the "India Skills Report" on the skill supply side and complements thousands of colleges across all Indian states and UTs to identify, benchmark and spot areas of competencies. It supplements institution wide candidate reports for developing competencies for employment by partnering with Confederation of Indian Industry, PeopleStrong, LinkedIn, Association of Indian Universities, United Nations Development Program and All India Council for Technical Education. Wheebox also partners with many Indian states to design and deploy State Skills Reports and with the Ministry of Labour and Employment with its proprietary BARO Career Interest Report by helping candidates make right career choices on the 'National Career Service' and across 'Model Career Centers' in India.



Confederation of Indian Industry

The Confederation of Indian Industry (CII) works to create and sustain an environment conducive to the development of India, partnering industry, Government, and civil society, through advisory and consultative processes. CII is a non-government, not-for-profit, industry-led and industry-managed organization, playing a proactive role in India's development process. Founded in 1895, India's premier business association has more than 9100 members, from the private as well as public sectors, including SMEs and MNCs, and an indirect membership of over 300,000 enterprises from 291 national and regional sectoral industry bodies.

CII charts change by working closely with Government on policy issues, interfacing with thought leaders, and enhancing efficiency, competitiveness and business opportunities for industry through a range of specialized services and strategic global linkages. It also provides a platform for consensus-building and networking on key issues. Extending its agenda beyond business, CII assists industry to identify and execute corporate citizenship programmes. Partnerships with civil society organizations carry forward corporate initiatives for integrated and inclusive development across diverse domains including affirmative action, healthcare, education, livelihood, diversity management, skill development, empowerment of women, and water, to name a few.

India is now set to become a US\$ 5 trillion economy in the next five years and Indian industry will remain the principal growth engine for achieving this target. With the theme for 2019-20 as 'Competitiveness of India Inc - India@75: Forging Ahead', CII will focus on five priority areas which would enable the country to stay on a solid growth track. These are - employment generation, rural-urban connect, energy security, environmental sustainability and governance. With 68 offices, including 9 Centres of Excellence, in India, and 11 overseas offices in Australia, China, Egypt, France, Germany, Indonesia, Singapore, South Africa, UAE, UK, and USA, as well as institutional partnerships with 394 counterpart organizations in 133 countries, CII serves as a reference point for Indian industry and the international business community.





taggd•

By  PeopleStrong®

Taggd Corporate Office

People Strong, A-10, Infocity-1
Sector-34, Gurugram, Haryana, India- 122001

Email: contact@taggd.in

Phone: +91 9560998686