

What the Public Sector Workforce Wants

What 11,000 workers around the world tell us
about their ideal post-pandemic workplace

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THE NETWORK 
Global talent simplified

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Contents

01	Introduction	05	Social Issues Are Increasingly Important
02	How the Public Sector Wants to Work	06	Unthreatened by Automation
03	Fewer Public Sector Workers Would Relocate, but More Would Work Remotely for a Foreign Employer	07	Public Sector Employees Are Willing to Reskill, and Favor Online Learning Resources
04	Workplace Relationships, Work-Life Balance Remain Key Job Factors	08	Implications: Preparing for the Future

01 Introduction

Public sector workers worldwide labored hard during the Covid-19 pandemic to address unprecedented health, safety, education, unemployment, and social needs. They showed up – and showed just how capable, resilient, and flexible they are, even under the most trying of circumstances. Whether they worked in administrative, service, managerial, social services, or other public-sector roles, they adapted to new ways of working, and used new technologies.

In the future, these employees want to retain the flexibility and autonomy they gained during the pandemic era. And even as the way they work changed, or perhaps because of it, they continue to appreciate good workplace relationships, work-life balance, and the chance to do meaningful, interesting work. They also display a willingness to learn new skills that should serve them well as increasing automation upends the status quo of jobs across all industries.

These are some highlights of a worldwide survey of public sector workers conducted by Boston Consulting Group and

The Network, a global alliance of recruitment websites. The survey included approximately 11,000 public sector workers from a total of 209,000 people in 190 countries. (See Exhibit 1.) BCG and The Network polled these workers as part of its ongoing Decoding Global Talent series. (See the sidebar, “Methodology.”)

Government agencies and other public sector employers need to understand employees’ preferences and how they want to work in the future in order to develop strategies to attract and retain top talent. Employers may need to get creative to offer the degree of flexibility many public sector employees say they want. Although fewer public sector workers would consider an international assignment than in the past, employers can take advantage of the popularity of remote work to explore previously untapped pools of virtual labor. To future-proof their workforce, employers may also need to be generous in providing upskilling and reskilling opportunities through the non-traditional settings in which public sector employees prefer to learn.



WHAT THE PUBLIC SECTOR WORKFORCE WANTS

Methodology

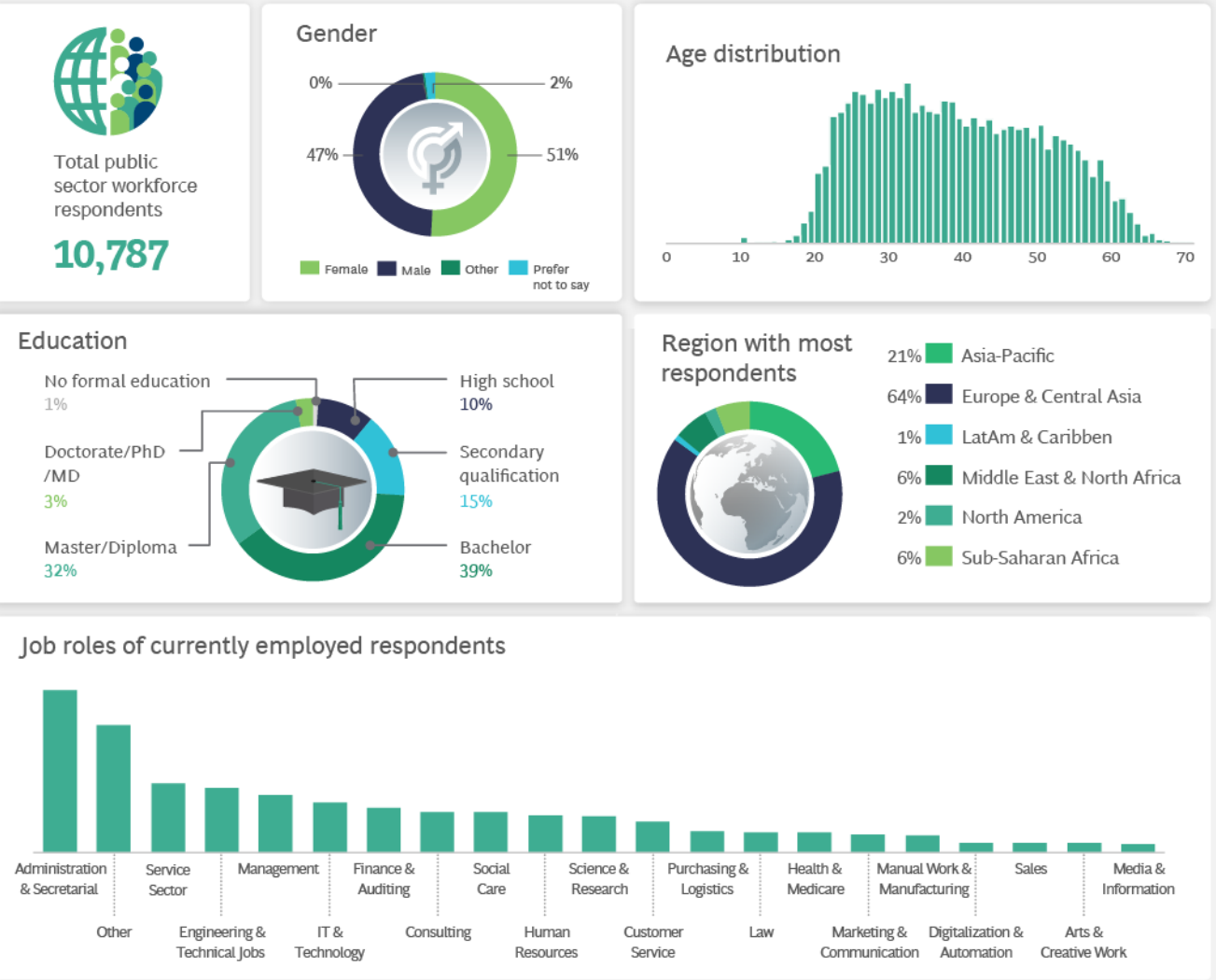
BCG and The Network, together with its affiliate organizations, conducted the survey in October and November 2020. All told, 208,807 people in 190 countries participated. Out of this, approximately 11,000 respondents work in the public sector in a range of jobs. The public sector sample includes slightly more women than men. The majority of respondents are ages 25 to 55, and more than two thirds have earned a bachelor degree or higher.

The 40-question survey elicited workers’ attitudes on a variety of topics, including willingness to work abroad, countries other than their own where they would most

like to work, and the impact of Covid-19 on their work preferences, employment, and willingness to learn new skills. Information gathered in the survey, including workers’ nationalities and job roles, made it possible to analyze their attitudes along a variety of parameters. BCG also conducted follow-up Zoom interviews with select respondents around the world.

Survey results have been published in three articles. The authors explored how the pandemic has changed people’s preferences for physical and virtual mobility; how they want to work; and willingness to learn new skills or change careers to stay competitive.

Exhibit 1 Demographics of Public Sector Respondents



Note: In addition to currently employed respondents, 30.45% of total sector respondents were looking for employment at the time of the survey.
Source: BCG/The Network proprietary survey of 10,787 public sector workers

02 How the Public Sector Wants to Work

The role the public sector workforce played in keeping government services up and running during the pandemic is evident from the stable employment in the sector during that time. It could explain the preference many public sector employees have for maintaining the flexibility and autonomy they gained heading into the future.

When other industries cut their workforces to survive the pandemic, public sector employers hung onto workers in healthcare, social services, and citizen support. In all, 57% of all public sector employees kept their jobs, another 14% worked more hours than they had before, and 5% were asked to fill a different role. The portion of workers in the

sector who lost jobs or had their work hours cut (24%) is one of the lowest of the 15 industries we surveyed, second only health care (23%).

Like workers across all industries, many public sector employees had to pivot to working remotely. Now that they've grown accustomed to it, they want to maintain some flexibility over where they work. If given the option, 69% would prefer to maintain some combination of onsite and remote work, 20% want to work remotely all the time, and 11% would prefer to be onsite exclusively. (See Exhibit 2.) The vast majority of workers in the sector – 89% - would prefer to work from home at least one day a week, and 69% want to work from home two or three days a week.



Public sector employees’ desire for flexibility extends to when they work. The largest percentage (48%) prefer to work some combination of fixed and flexible hours, 23% want complete control over their work hours, and 29% prefer a job with set hours, somewhat less than the 36% cross-industry average. To accommodate such a range of preferences, employers could require employees to work the same hours every day—say, from 10 am to noon—regardless of their location, with leeway to set the rest of their schedule as they see fit. Or employers could require employees to work specific hours on specific days.

People’s preference for how they want to work varies by the type of job they hold. Public sector employees who are knowledge workers in IT and science and technology, for example, are likelier to prefer a hybrid schedule or working remotely all the time compared with employees who hold jobs in management and administration, which traditionally have been more office-based. Public sector employees with jobs that require physical labor or who have frequent social interactions are even less inclined to want to work a hybrid schedule or remotely.

Exhibit 2
Public Sector Employees Want Flexibility in Where They Work

Preferred location for work by percentage of respondents



Source: 2020 BCG/The Network proprietary web survey and analysis

03 Fewer Public Sector Workers Would Relocate, but More Would Work Remotely for a Foreign Employer

The past few years deepened a long-term decline in public sector employees' willingness to move abroad for work. Since our first global talent survey in 2014, the portion of public sector workers interested in relocating to a different region for a job has dropped from 64% to

44%. Even before the pandemic, some countries required applicants to be citizens in order to hold a public sector position, which limits the opportunities for people willing to relocate. Stricter restrictions on immigration and nationalistic policies have added to the decline.

For the portion of employees willing to move, Canada is the most popular destination for a work-related relocation, followed by Germany, Australia, the US, and the UK. (See Exhibit 3.) Canada, Germany, and Australia have gained standing as work destinations in recent years at the expense of the US, which was the most popular work relocation destination in 2018. The change could be the result of the top three regions being perceived as more welcoming, socially or economically stable, or better managing their response to the pandemic.

Competitive relocation programs for public sector workers could be attracting talent to a specific region. Teach for Canada, for example, recruits teachers to work in the country's more remote regions, and provides financial incentives to supplement the higher cost of living in those

areas. The only requirements for someone relocating from a different country are a work visa and certificate to teach in Canada.





















With remote work more commonplace, it's opened the door for employers to recruit workers from different regions, and created new opportunities for public sector employees. Although less than half of public sector workers would move abroad for work, 52% would work remotely for a foreign employer. Hiring remote workers from a different country lets employers tap into new, virtual talent pools. Government organizations, for example, could hire scientists based elsewhere to conduct research or perform other duties that do not need to be done in person, without having to deal with visas or other government requirements.



Exhibit 3

Top Locations Employees Would Relocate for Work

Ranked by percentage of respondents who would move to each location

	1	2	3	4	5	6	7	8	9	10
Among respondents in the Public Sector 2020	 Canada	 Germany	 Australia	 US	 UK	 Switzerland	 France	 Japan	 Italy	 Austria
Among Respondents in the Public Sector 2018	 US	 Canada	 Germany	 UK	 Australia	 Spain	 France	 Switzerland	 Italy	 Austria

Source: BCG/The Network proprietary survey of 10,787 public sector workers

04 Workplace Relationships, Work-Life Balance Remain Key Job Factors

The past few years have solidified public sector employees' appreciation of good workplace relationships and work-life balance as the attributes of their jobs that matter the most. For this sector, maintaining a good relationship with colleagues tops all other elements of work. (See Exhibit 4.) The sentiment could be an outgrowth of the pandemic-era period when workers couldn't be together physically so they relied on

other forms of communication to be there for each other, which strengthened workplace bonds. The second most important element is keeping an equitable balance between their jobs and their lives outside of work, a feeling that workers from all sectors shared during the crisis. The third is maintaining a good relationship with their supervisor.

Public sector employees place significantly more value than the cross-industry average on being appreciated for their work, and having interesting work to do, and put both of those job attributes ahead of financial compensation. It confirms a long-standing belief that public sector workers see what they do as a calling as much as an occupation. Such sentiments could explain how teachers, healthcare providers, first responders, civil servants, social workers,

and other public sector employees managed the increased workloads many dealt with during the pandemic. The heftier workload that public sector workers carried during the pandemic era pushed longer-term job attributes further down the list, including making progress in their careers, and learning and development.

Exhibit 4
Public Sector Job Priorities Remain Steady
Rank based on importance of job elements to respondents



Note: Respondents could choose from a total of 29 job elements
Source: 2020 BCG/The Network proprietary survey of 10,787 public sector workers



05 Social Issues Are Increasingly Important

The Covid-19 pandemic isn't the only crisis confronting the world in recent times. The past several years saw a swelling racial justice movement, geopolitical conflicts, political upheavals, #MeToo, and natural disasters and other climate catastrophes on multiple continents. As a result, employees across the board – including those in the public sector – have become more attuned to workplace values and where prospective employers stand on social issues.



Of public sector workers, 70.5% in total and 76% of those ages 30 and younger say environmental responsibility has become more important in the past year. (See Exhibit 5.) More than half (52.4%) of all age groups, and 56% of younger workers, say they would not take a job with an employer whose environmental beliefs do not match their own.

These workers feel just as adamantly about diversity and inclusion. Of all public sector workers, 71.3% consider equity issues to be very important, and 74% of workers ages 30 and younger. Equity issues are significant enough that 51.4% of the global public sector talent pool and 54% of younger workers in it would exclude from a job search any employer with beliefs about diversity and inclusion that do not match their own.

Exhibit 5
Public Sector Employees Care About Social Issues



Source: BCG/The Network proprietary survey of 10,787 public sector workers

06 Public sector talent is less at risk of automation and mass redundancy

The pandemic changed how public sector workers perform their jobs, most notably accelerating their transformation to digital, including teachers who switched to online learning, healthcare providers to telemedicine, IT office workers to working remotely, and the like.

Longer-term megatrends, led by a steady rise in workplace automation, will continue to reshape jobs and professions as technology assumes more tasks once done by people. The public sector is no exception. However, perhaps because of the rapid transition to digital they have already experienced, the public sector workforce remains relatively sanguine about any threat to their livelihoods that automation poses.

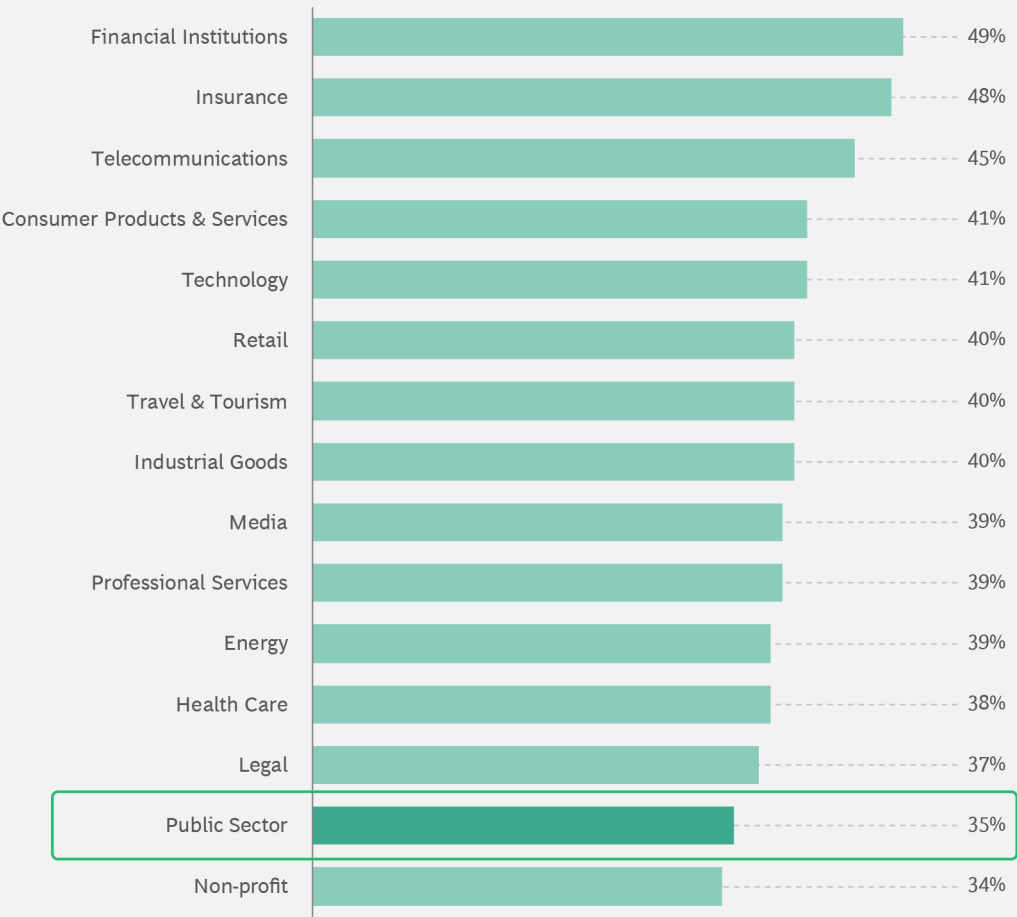
In fact, employees working in the public sector are the second least likely out of the 15 industries we surveyed to say they see automation as a growing concern. Out of the entire industry, only 35% perceive automation as a threat, slightly more than nonprofit employees (34%).

(See Exhibit 6.) Employees in the sector are also less susceptible to being replaced by technology because human interaction is a key element of many public sector positions, and because of the significance that society places on many types of public sector work.

Exhibit 6

Fewer Public Sector Workers Worry About Automation

Percentage of respondents by industry who view automation as a growing job threat



Source: BCG/The Network proprietary survey of 10,787 public sector workers



07 Public Sector Employees Are Willing to Reskill, and Favor Online Learning Resources

In surveying workers across multiple industries, we have found a direct connection between the risk that people perceive automation to be to their livelihoods and their willingness to pick up the new skills that they need for a new job. The bigger the threat, the more open people are to reskill. Public sector employees are less motivated than employees in many other industries to reskill or upskill based on concerns about automation. But that does not

mean they are uninterested in improving their skills. Far from it. Overall, 64% of employees in the sector would learn new skills to change jobs or careers. Although that is slightly less than the 68% cross-industry average, it is still a substantial portion – close to two-thirds of the sector – and suggests an overall high level of flexibility among this workforce.

A similar number - 63% of all public sector workers - spend a minimum of a few weeks a year taking classes or developing their skills in some other way, an indication that they understand the necessity of staying abreast of job-related knowledge. In recent times, non-traditional options have become more popular for picking up new skills. Since our 2018 survey, learning on the job displaced self-study as

the most popular way to reskill. (See Exhibit 7.) Likewise, taking classes online through a digital academy or massive open online course (MOOC) has become more popular than attending conferences or seminars as a way to reskill or upskill, which could be in part because the pandemic made attending in-person classes difficult if not impossible.

Exhibit 7 Non-traditional Learning Options Have Become More Attractive

Percentage of respondents who used a given resource to learn new skills

Rank among respondents	2018	Today
1	Self-study 61%	On-the-job training (e.g., coaching, job rotation) 65%
2	On-the-job training (e.g., coaching, job rotation) 54%	Self-study 61%
3	Conferences & seminars 43%	Online educational institutions (e.g., correspondence course, MOOC) 48%
4	Traditional educational institutions (e.g., academic degrees, vocational degrees) 39%	Conferences & seminars 46%
5	Online educational institutions (e.g., correspondence course, MOOC) 30%	Traditional educational institutions (e.g., academic degrees, vocational degrees) 42%
6	Mobile apps 17%	Mobile apps 30%
7	Government programs 16%	Government programs 27%

Notes: MOOCs = massive open online courses
Source: BCG/The Network proprietary survey of 10,787 public sector workers



08 Implications: Preparing for the Future

Public sector employees run the gamut from health-care providers and first responders to social workers and highway maintenance crews. Regardless of what they do, in the past few years, many were forced to change how, when and where they work through circumstances out of their control. Now, they want more say over their working conditions. For leaders, it's a cue to develop workforce plans that accommodate employees' preference while simultaneously optimizing their performance and staying true to an organization's mission. Leaders can do that by taking the following into consideration.

1. Use a strategic workforce plan.

Analyze the makeup of the current workforce against anticipated future needs to determine a talent strategy. A thorough strategy identifies the future skills an organization requires, the mechanisms needed to obtain them, and the role that reskilling and upskilling can play in that. It's important to adapt plans in real time as new circumstances, economic, or social conditions arise. Recognize too, that different jobs could accommodate different levels and types of flexibility.

2. Create comprehensive hybrid- or remote-work strategies. Most public sector workers would like to choose their own work schedules, and many want to work remotely at least part of the time. However, the desire for remote work has the potential to create an “us vs. them” rift between employees and managers, if not handled appropriately. To avoid it, leaders can cultivate a mindset of “we’re all in this together,” with principles

that support trust, togetherness, and flexibility in where and when people work. Ideally, leaders could give teams the authority to set hybrid- or remote-work policies and other workplace norms.

3. Lead differently.

A workforce in which many people work virtually requires leaders to have different skills. Chief among them is the ability to support direct reports regardless of where they work. Because the public sector workforce values collegiality as a top job attribute, leaders must also know how to support good working relationships among coworkers. That support could come in the form of teaching employees about collaborative styles of work. Leaders may also need to help people maintain a healthy work-life balance, as separate BCG research on remote work during the pandemic found that employees' wellbeing can affect their performance and productivity.

4. Let employees know their work matters.

Public sector employees want to know that their work is appreciated, and that what they do adds value to society. It is up to leaders and supervisors to give employees regular feedback on their progress, celebrate their successes, and help them see the real-world impact of their jobs. Recognizing people's accomplishments in this way supports positive engagement and job satisfaction, which can go a long way toward retaining top talent. Public sector employees also care about having interesting work. To attract top talent to public sector jobs,

leaders should ensure that people have assignments that are exciting and challenging. One way to do that is to use automation to handle routine, administrative tasks, which frees up time for people to focus on more complex, creative tasks.

5. Invest in upskilling and reskilling.

By some accounts, machines will perform half of all work tasks by 2025, and AI could displace up to 40% of the world's professions by 2035. In such a rapidly changing work environment, employees need to constantly refresh their skills. Continuous learning will become the norm for all workers, including those in the public sector. In our client work, we've found that helping employees obtain skills to transition from one role to another is more cost effective than large-scale recruitment of new hires who need to learn the same skills. We've also found that to win at learning, organizations need to incorporate skill-building into the work that people do every day. They must offer skill-building at all levels of the enterprise—top to bottom—as an integrated part of the business, and use regular business metrics to measure its impact. In Singapore, a recent government reskilling program filled 6,000 public-sector IT positions by reskilling civil servants, some with little or no prior IT experience. Everyone in the program received credits to pay for courses in user experience and web development.

6. Promote social values.

Public sector employees care about what's happening in the world, as evidenced by the large number who say social and environmental issues are more important than ever. These issues are especially meaningful to younger workers, who could conceivably work in the sector for years to come. Organizations can appeal to current and future workers by advancing activities related to social and environmental issues, including being actively involved in climate action and sustainable development. They can back up promises by setting KPIs, for example, to improve diversity and inclusion, and organizing volunteer environmental activities.

Disruptive technologies are maturing concurrently with changing demographics, social trends, and environmental factors. Work is aligning with these changes, and requires new jobs, new skills, and new ways of working. The public sector, which plays a vital role in society, must evolve to meet these changes. By considering workers' preferences, the public sector can provide the resources for a future that will be characterized by volatility, complexity, and uncertainty.



The future we are facing is new. For the first time, disruptive technologies are maturing concurrently with changing demographics, social trends, and environmental factors. Work is aligning with these changes and calling for new jobs, new skills, and new ways of working. The public sector, which plays a vital role in society and ensures the fundamental conditions of life, must evolve to meet this new future head-on. Considering the wishes of public sector workers, society will provide the foundation for further development, doing so in a new reality characterized by volatility, complexity, and uncertainty.



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