

white paper^o

A Threesixty Publication
360steelcase.com

Generation Y
India & China

November, 2010

New-Gen workers in India & China: Reshaping their workplaces & the world

As residents of the world's hottest centers of economic growth, young people in India and China are breaking new ground while surrounded by traditions. Providing the best workplaces for these workers starts with understanding what their generation is all about.

Steelcase WorkSpace Futures

white paper

They have some things in common with each other and their Generation Y counterparts in the U.S. Most notably, they're all participants in a convergence of technology that has flattened the globe, created new supply chains and shifted distributions of wealth.

At the same time, because of unique histories, traditions and memories, the newest generation of workers in India and China remains distinctly themselves with their own sets of aspirations, expectations, and needs.

Understanding these workers and their impact on the workplace is important for any organization that seeks to succeed in the hugely hot centers of business opportunity that India and China represent today. Although there's efficiency gained with global real estate standards, it's also true that workplaces that support distinct worker needs ensure better productivity and increase the ability to attract and retain the best people anywhere in the world. The sheer power of demographics makes this an especially important consideration for India and China, which now represent in combination one-third of the total global population. China's economy is expanding by almost 10% annually, and India is predicted to become the world's 4th largest consumer economy by 2025.¹ Urbanization in both countries is happening at an unprecedented rate. India and China alone will account for more than 62 percent of Asian urban popula-

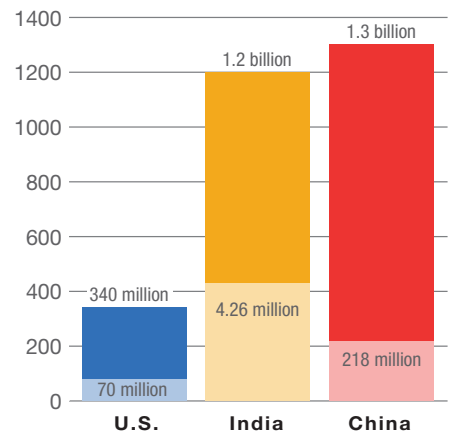
tion growth and 40 percent of global urban population growth from 2005 to 2025.²

The fundamental shifts have implications for local cultures and the world economy. Clearly, these Asian countries are key growth markets with significant influence and demands that are just starting to be unlocked. And, on the basis of sheer numbers alone, these vast populations are already exerting tremendous influence on work and the workplace, just as Baby Boomers did when they entered workplaces in North America. As the clout of young people in India and China climbs, they're changing their countries and the world.

To better understand the newest generation of workers in these two important countries, Steelcase completed primary research projects in India and China in 2010, building on methodologies and insights from a previous study of Generation Y workers in North America. That study, completed in 2009, documented a significant influence on both work and the workplace that's underway in the U.S. due to Gen Y characteristics and their pervasive influence on the other three generations of workers in North American workplaces.

The India and China research projects were designed to gain first-hand insights into the characteristics of workers aged 20-30 in India and China. (There is no Gen Y in China; the equivalent population is called Post-80s and it spans just one decade.) The objective was to discover these two populations' cultural context and attitudes, how these translated into emerging behaviors and expectations at work, and then to assess the scope and types of workplace shifts underway as a result. As part of the synthesis of findings, the researchers uncovered key insights and extrapolated design principles for meeting these young workers' expectations and needs in the workplace. Though separate studies, both research projects were organized using common filters — culture, politics, economics, and technology — to provide opportunities for deeper insights through comparison and contrast. The study in China included observations, workshops and personal interviews with

GEN Y POPULATION* COMPARED TO TOTAL



*Gen Y in U.S. and India = born 1980-1999; in China the equivalent population is Post-80s = born 1980-1990

India and China now represent one-third of the total global population.

162 workers at eight multinationals and one Chinese-owned company in four cities. The study in India included 416 workers at 16 companies in six cities, 11 of which were multinationals and five Indian-owned. Both studies involved a cross-section of industries, from consulting to manufacturing. Workers of different ages were included, but the primary focus was on the youngest generation that entered the workforce within the past 8-10 years.

In this paper, we present the research findings to inspire ideas for creating more effective workplaces for these fast-growing worker segments. (The findings may also be helpful to companies that employ young Indian or Chinese immigrants in western-world locales.) First, we discuss dimensions of culture, politics, economics, and technology to provide a context for understanding the youngest generation of workers in each country. We then present findings of the primary research, including how the subjects described themselves and the behaviors that were observed. Generational differences within each country were synthesized into major shifts affecting the workplace. Finally, we offer some strategies for designers and employers to consider when planning workplaces for these young workers.

THE CONTEXTS OF CULTURES

Every generation is to some degree a product of its culture, even in times of unprecedented change. One way of understanding cultural differences between countries is a framework developed by a Dutch sociologist, Geert Hofstede, in the 1970s for IBM. Hofstede identified five dimensions/cultural attributes that impact cultural understanding. His study demonstrated that national and regional cultural groupings affect the behavior of societies and organizations. Subsequent studies have yielded similar results, indicating stability of the dimensions across decades.³

Comparing India, China, and the U.S. with Hofstede's model shows these differences:

- **Power Distance Index** (How removed from decision-making power do people expect to be?) Indians and Chinese expect to be more removed from decision-making power than Americans.
- **Individualism** (How reliant is a culture on relationships with people?) Reliance on relationships and their obligations are strongest in China and individualism reigns in the U.S.
- **Masculinity** (How distinct are emotional gender roles?)

All three countries are relatively close in the middle of the scale, indicating that these roles are not distinct.

- **Uncertainty Avoidance Index** (What's the degree of anxiety about the unknown?) Society in India has a slightly lower tolerance for ambiguity than China, but still higher than the U.S.
- **Long-term Orientation** (How much focus is there on growth, perseverance, and the future?) India ranks in the middle between the U.S. and China.

Generation Y in India and the Post-80s generation in China are products of their cultural contexts. While some of the attributes may eventually become blended in a vast cultural melting pot in our hyper-connected world, today there remain distinct differences, especially in older generations. Understanding this context is a valuable first step toward understanding where the youngest generations of workers are coming from — and what they may be in the process of changing. Educated, ambitious and highly tech savvy Indian Gen Yers are eager to prove that they are as competitive as their global counterparts.

GENERATION Y IN INDIA: AMBITIOUS NATION-CHANGERS

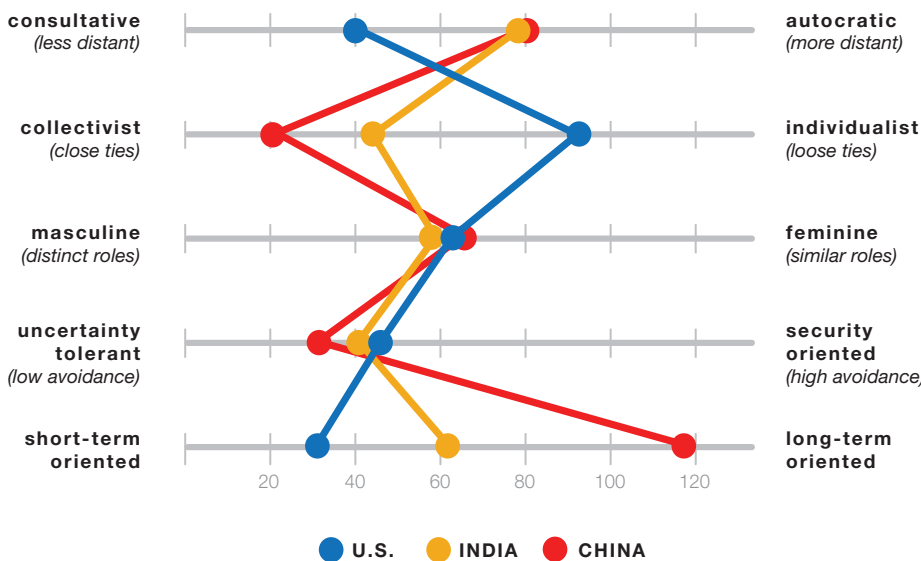
A diverse country of 28 states, 17 major languages, 29 widely celebrated festivals and 19 main regional cuisines, India has a 5,000-year history of absorbing customs, tradition, and heritages.

The nation's contemporary story started in 1991 when economic liberalization opened up the economy. This made it an attractor for cheap labor for multinationals and easier for entrepreneurs to start up businesses. It's said that India didn't come to the world; instead, the world came to India.⁴

The economic liberalization and global technologies have produced a generation that differs from its conservative parents: India's Gen Y mixes Indian values with Western outlook. Its huge English-speaking and highly educated professional base is luring multinational corporations that want

INDIA'S GENERATIONS	
Generation Y	born 1980 – 1999
Generation X	born 1965 – 1979
Older Generation	born 1946 – 1964
Freedom Fighters /Traditionals	born before 1945

GEERT HOFSTEDE'S MODEL OF CULTURAL DIFFERENCES





to explore India's service capabilities and opportunities for research, engineering, and innovation.⁵

Whereas for their parents' generation, the struggle for independence and "being Indian" were very important, Gen Y cites things such as the iPhone, the Obama presidency, A. R. Rahman winning an Academy Award, and TATA cars as significantly important events.

In few other places are the cultural and generational shifts taking place in India more apparent than in the workplace. It's here that the younger generation's ambitions and attitudes take center stage as they strive to influence their country's economy and their own destinies in ways that matter. Through education and enterprise, they hope to make an impact. Jobs in high tech and the media are considered prized, with computer science the most sought-after field. Entrepreneurs are getting younger, and many young Indians work two jobs. For Indian Gen Yers, the work they do is as important as the reputation of the company and the salary paid. They strive for differentiation through education, reputation, brands and technology, and especially money.⁶

For many up-and-comers, the workplace is a leveler of varied backgrounds: economic,

educational, social, and religious. Yet, with family life so important in their culture, young workers are challenged by the stresses caused by a lack of clear boundaries between work and life, exacerbated by the amount of time most spend commuting.

Perhaps ironically, their personal ambitions don't compromise team work in the workplace. They look to their employers and coworkers to help them learn, and even call centers are highly team-centered.

Despite their liberalized ambitions, young Indians remain traditional in many ways. They're proud of their nationality and intend to bring their country forward in the 21st century as a way of achieving recognition and success. In some ways, their fascination with movies (both Bollywood and Hollywood) can be considered a way of seeing their own lives come to reality.

INDIA'S CHANGING WORKPLACES: 7 KEY SHIFTS

Steelcase researchers identified seven key shifts happening in the Indian workplace. Some are just at the beginning stages, while others are further along.

Shift #1: From local to global

In the past, India was relatively isolated from

GEN Y IN INDIA

These are the behaviors they're bringing to the workplace:

Open-minded and positive

Open to ideas and new possibilities

Optimistic about their work and the future

Confident, independent, ambitious, and competitive

Desire and drive for entrepreneurship and making a difference^{7,8}

Keen sense of competition, both regional and global

Eager to prove they are not less than their global counterparts

Feeling of national pride

Energetic and hardworking

Work is essential, but the focus is on shortening or bettering the process

Always engaged in activities with peers: doing, sharing and discussing

Tech savvy, impatient, seeking quick money

Deep interest and pride in owning state-of-the-art technology⁹

Desire for instant gratification

Want lots of money, faster and quicker — and they like to spend

Losing Indian culture and values, selfish

Passion for Hollywood and western lifestyle is in conflict with traditional values

Shifting focus from "family first" to "me first": my work, my things, my friends and my world

For Indian Gen Yers, the work they do is as important as the reputation of the company and the salary paid.

the rest of the world. There was relatively limited awareness of what was happening in other countries. Though some Indians were traveling abroad for education and trade, it was not very common; global opportunities were rare.

Now, Indian companies are focused on serving a global community. Employees are aware of what's happening around the world, and they understand how their company's efforts fit into the global economy.

Shift #2: From service capabilities to core competencies

When multinational corporations first went into India, it was to outsource certain types of support labor, especially call centers, to save money. Because going abroad for specialized education wasn't possible for everyone and multinationals paid better, even educated people took the jobs that were unchallenging. These workers were dispensable, since the jobs were unskilled.

Now, multinationals are going to India to take advantage of the high level of technical expertise there in engineering, research, and innovation. Thanks to the privatization of the education sector in India that is expanding universities and bringing training centers to thousands of towns and cities, Indians no longer need to leave to get a specialized education, and employers increasingly look to Indian workers as experts, not so easily replaced.

Shift #3: From workplace = expense to workplace = investment

In a country where the economy is growing rapidly and real estate is at a premium in metro and mega cities, employers are used to fitting maximum employees in minimum space for efficiency. Typically, they've provided a desk and the minimum of tools and equipment for each person. In most cases, the work environment had no relation to the company's brand — branding was customer-focused and stopped in the lobby.

Now, increasingly in multinationals and private companies, spaces are being designed to support not only the work, but also the workers by giving them the appropriate tools, equipment, and work settings to work effectively. Companies are using their spaces to attract and engage the best workers, and there's growing realization of the inter-relatedness of the workplace, company culture, and brand. With the realization that brand and culture are lived in space, there's emphasis on workplace effectiveness, brand consciousness, and "cool" aesthetics.

Shift # 4: From inherited identity to created identity

Traditionally in India, identity is inherited from family, ethnic culture, and country. Family identity is about status and power — how are we different from others? Cultural identity is defined by language, customs, and geography. Indians identify themselves on the national level when discussing large, competitive events or when comparing themselves to foreigners.

Today, young Indians are captivated by the potential to create their own destiny and, hence, their own identity. "Who do I want to be?" is replacing traditional declarations of identity. The type of work a person does and the reputation of the company that he or she works for are important parts of the equation. Many parental values are carrying over — i.e., the importance of money and status — but the paths to achieving them are different. India's youngest generation is interested in claiming a new future for themselves and their country, while maintaining traditional values. They're putting the conservative constructs of their parents and the past behind them.

Shift #5: From job security to career growth

In the past, Indians worked to support the family. What a person did wasn't as important as having a steady income. Retirement security was important, and government jobs were desired.

Today, young Indians take jobs that they believe will build their career. Growth is more important than job security, and people will readily leave a job to advance. Retirement income isn't a concern for now; making money is. Every young person in India today wants to make an impact and become rich, and most believe they can.

Shift #6: From WORK/life to Work/Life

For most young Indians' parents, work dominated life. Performance was measured by the number of hours spent in the office. Previous generations sacrificed personal ambitions and desires in order to support family.

Now, as India gains status as a global technology center, performance is measured more often by the quality of work. Employers realize the value of employees who aren't easily replaced, and so they seek to reduce stress and build loyalty. For example, many private employers now provide transportation to and from work, allow employees to work from home, and host social events for workers and families at work.

Shift #7: From connections to collaboration

In past-generations India, relationships were leveraged to form business connections. Titles and roles were more important than skills when forming teams, and teams performed tasks assigned by the boss.

Now, more business relationships are formed based on capabilities and expertise, and teams are formed based on individual skills. The team collaborates with management to create the goal of a project, and brainstorming is becoming a norm.

In India as elsewhere in the world, the best companies and the best employees are collaborators, able to intersect departmental specializations and personal expertise to solve increasingly complex problems and innovate new solutions.

WORKPLACES THAT WORK IN INDIA TODAY

Whether designing workspaces for multinationals in India or locally owned companies, effective spaces support the shifts that Generation Y is reflecting and effecting. Here are some ideas to consider.

Design to support individuals

All workers want control over how they lay out and work through their tasks, along with the ability to switch work modes easily. Superior connections and support for technology, array and storage capabilities, and an easy-to-adjust, high-comfort chair can transform even a small footprint into an appealing, effective space for individual work.

Workers also value being able to display their individuality at work, with space for photographs, awards, and other personal differentiators, including expressions of religious and cultural values. Like Gen Yers in the U.S., they have strong peer affinity and want opportunities and spaces for casual interactions nearby.

Design for growth

Collaboration and mentoring happen best when space supports interaction. Providing "pull up a chair" space in individual workstations or nearby enclaves supports the convening of expertise. Learning from peers while on the job is a norm with Gen Y.

Design for work-life balance

Company-sponsored family social events at the workplace are a common occurrence in India, so spaces for relaxation, recharging and socialization are important as a way for India's new-generation employers to acknowledge the importance of family and social obligations in employees' lives.

Design for collaboration

It's about transparency of thinking, providing for networking opportunities and helping people express their ideas. Shared workstations and group work settings encourage peer-to-peer interactions and team work. Providing enough worksurface to spread out work plus ample whiteboards and tackable vertical surfaces help make concepts visible and support laddered thinking.

Onsite cafes, ping-pong tables, and other areas for networking and socialization are increasingly important workplace



amenities, especially if workers are allowed to do a portion of their work at home and need to connect visibly and quickly when in the workplace.

Design for global competitiveness

Gen Yers in India are highly competitive, eager to prove they're equal to their global counterparts, and organizations can leverage this attitude to advantage. Technology enhances company and employee identity and supports global communication, so the more tech-rich the space, the better. As India continues to invest in infrastructure, providing access to information and enhancing workplace opportunities to connect with people anywhere in the world is critical.

Design for effectiveness

India's ambitious and technology-oriented Gen Y is demanding a new social contract with their employers. Young workers want to be supported, recognized and rewarded, and they choose companies that can meet their expectations. Brand is an important reflection of differentiation, so young workers are rapidly gravitating to employers who infuse their identity throughout the culture and the workplace.

THE POST-80S GENERATION IN CHINA: ME-CENTERED

Chinese culture is predominantly that of the majority Han culture, mixed with various ethnic minorities from throughout the country. Like most of Asia, it is founded on Confucian and Taoist principles which emphasize respect for authority and social harmony above all.

While China was first unified as a single country during the Qin Dynasty (221-207 B.C.), its modern history began with the founding of the People's Republic of China in 1949. The decades of social upheaval that followed independence meant the country was focused inward, leaving China isolated from the Western world.

This changed in 1978 when Deng Xiaoping instituted economic reforms that opened up the country to foreign trade. Since then, it has become the second largest and one of the fastest-growing economies in the world. Urbanization is on the rise as rural workers migrate to nonagricultural industries. Attendance at universities is booming, as is Internet use with already more users than the entire U.S. population. With a greater G3 network penetration that many Western countries, even China's rural areas have access to the Internet via their mobile phones.

Compared to their parents (the Lost Generation) and grandparents (the Traditionals), the Post-80s generation has grown up in a

CHINA'S GENERATIONS

Post-80s	born 1980 - 1990
Post-70s	born 1965 - 1979
Lost Generation	born 1946 - 1964
Traditionals	born 1928 - 1945

time of relative political peace and economic prosperity. As the first generation of the one-child policy, they are experiencing the benefits of economic reform, open markets, and what's been described as "capitalism with a Communist twist."¹⁰

From fashion to music to cars to games, China's youth are consumers who are eager to absorb what the world has to offer. They want more for their lives than their parents could ever imagine. For the Post-80s generation, the availability of Apple products in China is regarded as almost as significant as the first Chinese space walk. Their materialism and all the attention they've enjoyed as only children have earned the nickname "Little Emperors."

Friends are their substitute for siblings. Raised by grandparents while their parents were working, traditional values are deeply ingrained even while they're embracing modernity. Although more privileged than their parents on the economic front, they face special challenges. Expanded educational opportunities have produced a glut of college graduates, so in big cities there's a growing number who are unemployed or under-employed.¹¹

At the same time, the percentage of people over 65 is growing, predicted to be almost a fifth of the population by 2050 compared to just a twentieth in 1950.¹² That could mean drained savings for the elderly as well as young workers who will need to support their parents as nest eggs are depleted. So, while they're beneficiaries of a more open, prosperous economy, the Post-80s generation also feels intense pressure to succeed, with all their family's hopes singularly resting on them.

CHINA'S CHANGING WORKPLACES: 6 KEY SHIFTS

Steelcase researchers identified six major shifts happening in China's workplaces as a result of the influential Post-80s generation.

Shift #1: From harmony to identity

Harmony was and is the basis of social behavior in China. This isn't conformity.

From fashion to music to cars to games, China's youth are consumers who are eager to absorb what the world has to offer.



Rather, individuals have learned to adjust their identities to blend with the society around them – as members of a group, rather than as individuals. Now, young people are starting to create their own identities based purely on their own interests. This can sometimes create conflict with traditional values, though Post-80s generation participants still retain strong values of responsibility to family.

Shift #2: From teamwork to collaboration

Very closely tied with shift #1, collaboration depends on the willingness and ability of individuals to express their ideas and opinions, and debate options before reaching a shared point of view. In China, society is moving in this direction as individuals begin to express their own identities, but it isn't yet firmly established. Teams are becoming project-based versus department-based, with increased emphasis on pooling ideas. As hierarchy eases its hold, teams are encouraged to contribute more. Collaboration will become easier as people become more comfortable expressing differing opinions and working constructively through conflict, but today it can still be a struggle.

Shift #3: Job security to growth

In the past, job security was highly desired and having a job for life was often more important than what that job was. People were dependent on pensions from their companies or the government for support after retirement, or they took another job to continue to earn income. To the youngest generation, continuous learning is more important than job security. Young people expect to be independent, able to take care of themselves and their families after retirement. This new generation is also becoming

more entrepreneurial due to increased competition for limited jobs and the global economic crisis.

Shift #4: From supporting the work to supporting the worker

Employers in China used to think only about employees when they were at work doing their jobs. Now, young employees expect to get more out of the work experience, and progressive employers are responding. Workers want to be able to socialize with colleagues and do overtime at home. The new generation is looking for a variety of spaces in the workplace – for different kinds of work as well as informal breaks. Meals are a social occasion in Chinese culture, making on-site cafeterias and pantries valued.

Shift #5: From worker to explorer

China's Post-80s generation is all about learning and exploring. Instead of applying for whatever job may be available, they're applying to companies that seem to offer the most opportunities for growth. Young Chinese want to develop a career path of their own and aren't afraid to change jobs to do it. Instead of just performing "drone" tasks as assigned, they want to help their companies be better – and perform better by going beyond what's expected.

Shift #6: From work & life to working & living

For China's Lost Generation, work was about performing assigned tasks and life was about going home to be with family. The two were kept separate, and expectations for greater work-life balance were low because exposure to any alternative was low. Today, with globally aware workers routinely exposed to alternative scenarios and employers increasingly challenged by global competi-

POST-80S IN CHINA

These are the behaviors they're bringing to the workplace:

Energetic & active

Want to be asked for their opinion

Want to be active participants in the process, not just come to work to perform a task

Like to communicate

Comfortable communicating via phone, email, instant messaging

Working long-distance with global colleagues is no problem

Confident, optimistic

Confident they can do anything they are asked to do

Often need mentoring, but aren't afraid to try something new on their own if the office culture supports it

Trendy, forward thinking

Following the latest trends and brands – will gravitate towards "cool" companies

Any opportunity is a learning opportunity

Always looking to grow through exploration (travel, TV, talking to others, classes, Internet)

Looking forward to the future

Self-centered

Compared to previous generations, they're selfish

Still retain many traditional Chinese values towards family, but it's mixed now with the desire to fulfill one's own dreams

tion, working now implies an active role in the company, contributing to new ideas, new processes, and new ways of working. “Living” also typically has a broader scope, reaching beyond family to include friends, traveling, and hobbies with an emphasis on exploration and learning. Overtime is expected, though not necessarily welcomed. Young workers want to work hard and play hard, with clear boundaries between the two.

WORKPLACES THAT WORK IN CHINA TODAY

With dramatic differences between older and younger generations, workplaces in China are being transformed to be effective and desirable places that attract the younger generation. Here are some design ideas to consider.

Design for collaboration

Young workers value proximity to the team, as long as there’s space for privacy, too. A variety of settings is ideal, especially spaces like lounges, pantries, and cafes where social interaction can occur alongside work. From scheduled meetings to quick discussions, collaboration means a series of connections with team members who are often both co-located and distributed. In a culture that more actively communicates virtually than face-to-face, workplace furniture and tools that support an easy exchange of digital information may provide an easier transition to collaboration than traditional collaboration tools, such as whiteboards.

Design for growth

The Post-80s generation isn’t afraid to demand their due: they want to be rewarded with more opportunities. They value transparency and openness in an organization and dislike networking that happens without them behind closed doors. Spaces that support easy mentoring — an enclave nearby, seating around a corner — can show that an organization is accessible and worthy of a young worker’s best efforts and loyalty.

Design for identity

With so much individual attention bestowed on them beginning at birth, it’s understandable that China’s “Me Generation” wants to express their burgeoning identities at work. Allowing for personalization with accessories, technology, and trendy work tools makes the workplace less routine and more fun.

Design for the worker

Harmony of mind, body, and spirit is an essential component of traditional Chinese culture. Workplaces that are too small or

aren’t efficient can easily disrupt concentration and creative flow. Adequate space for each person is important, as is the right balance of privacy. Young workers also scrutinize the location of employers, with a strong desire to minimize commuting so there’s more time to be with friends and family.

Design for the explorer

Access to information is critically important for the Post-80s generation. Anything that provides faster, easier access to information and people is regarded as a better track to the opportunities and success they desire. The ability to work on a variety of projects will keep this generation engaged and active in the company’s progress, which can have size, storage and technology implications for individual workstations.

Design for living and working

Adding fun to the workplace satisfies the ideals of the Post-80s generation. Pantry and cafe spaces at work are essential gathering places. A variety of areas for both work and relaxation make the workplace a fun and friendly place to be, while flexible hours enable employees to pursue interests outside of work.

THE BOTTOM LINE: RESPOND TO CHANGE

Key shifts are occurring as the youngest generation of knowledge workers is entering Indian and Chinese workplaces in droves. The shifts already underway will become even more pronounced as the youngest generation’s numbers grow. While young people in India and China are passionate about many aspects of western culture, it’s a mistake to assume that translates into a desire to become westernized. Part of their energy and confidence is a belief in their own country’s ability to be a world leader and their own ability to be active participants in that rapid evolution.

The best workplaces in India and China support the emerging workstyles of their youngest workers. The world may be flatter, but cultures remain distinct in terms of both geography and generation. Multinational organizations that make an effort to understand the youngest workers wherever they’re located stand the best chance of successfully engaging and supporting them. More than ever, workplaces that are thoughtfully designed to help people do their best work can translate into business success throughout the world.



ACKNOWLEDGEMENTS

Steelcase conducts ongoing research on work, workers, and the workplace, and this research forms the basis of our perspective on how the workplace can strategically support the newest generation of workers in India and China.

ENDNOTES

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