

NASSCOM Return to Workplace Survey:

Evolving Towards Hybrid Operating Model

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Return to Workplace in Hybrid Operating Model



Key Takeaways

Employees and employers equally interested in returning to workplace in a hybrid setup, **~50% of workforce** likely to return to offices for up to 3 days a week by Jan'22

Employee Perspective

- 01 Workforce under the age of 25 & above 40 years (junior and senior management) wants a sooner return to workplace as compared to middle management
- 02 Female workforce is equally interested in returning to workplace
- 03 Better Infrastructure and hardware, Alignment with organizational culture, Social connect and bonding with peers, and lesser distractions as compared to WFH are the top four reasons for employee preference to return to workplace as responded by 28%, 27%, 25% and 20% of respondents respectively
- 04 Employees believe that safety from COVID-19, higher productivity, flexible work timings, and better communication with supervisors were the four top reasons why they enjoyed remote working
- 05 Employees expect their organization to have a 1-3 month roadmap to bring workforce back to premises; employees under the age of 25 require lesser time to return to workplace as compared to others
- 06 Higher employee satisfaction during remote work reported by 66% of survey respondents

Employer Perspective

- ~60% of organizations will reach readiness to re-open office spaces by Jan'22
- The top three employer concerns for return to workplace are maintaining organizational culture, data/ cybersecurity, and managing critical business functions.
- Employee health & safety remains the key consideration for return to workplace, voiced by over 81% of organizations
- Data security, stakeholder preferences, and employee vaccination status are likely to be the key determinants of which employees will return to workplace first
- ~72% of organizations looking at up to 50% of their workforce returning to office by Jan'22

Return to Workplace in Hybrid Operating Model



Key Takeaways

Future of Work Outlook - Hybrid Operating Model

- 01 70% of organizations are looking at hybrid work models
- 02 40% of the employees expect to work from office premises up-to 3 days a week
- 03 Organizations with workforce of 1,000 or more are likely to adopt hybrid work model at 83% as compared to the tech industry average of 70%
- 04 IT Services and GCCs are likely to be early adopters of a long-term hybrid work model
 - ▀ Integrating Flexibility and agility in the Hybrid Model – The Ideal Hybrid Work Model

NASSCOM Recommendations on Transitioning to a Hybrid Ready Operating Model and Return to Workplace

10 Point Check-list on Hybrid Model Readiness – Organizational Playbook

- Stakeholder Consent and Support
- Physical Space Readiness
- Workforce Readiness
- COVID Readiness
- IT Infrastructure Readiness
- Supporting Infrastructure Readiness
- Business Process Readiness
- Robust Communication Model
- Financial Readiness
- Readiness on Allied Parameters



About the Report

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Return to Workplace Survey

Over the last one and a half years, the way tech organizations in India have run business operations has undergone massive transformation. Q1FY2021 witnessed organizations making significant investment in hardware ranging from large-scale laptop purchases to transition of business operations, to cloud to ensure business continuity in wake of office closure resulting from COVID-19 led restrictions.

As the tech industry moved towards perfecting the distributed delivery model, a majority of organizations also instituted skilling and training of managers and supervisors to lead teams in a remote working model. While the benefits of remote model were noted in terms of higher workforce productivity and greater flexibility for employees, risks related to data and cybersecurity mounted along with an impact on organizational culture.

With gradual re-opening already underway, 70% of tech organizations are looking at perfecting a hybrid operating model which brings in the best of both worlds (on-site operating model and distributed/ remote operating model).

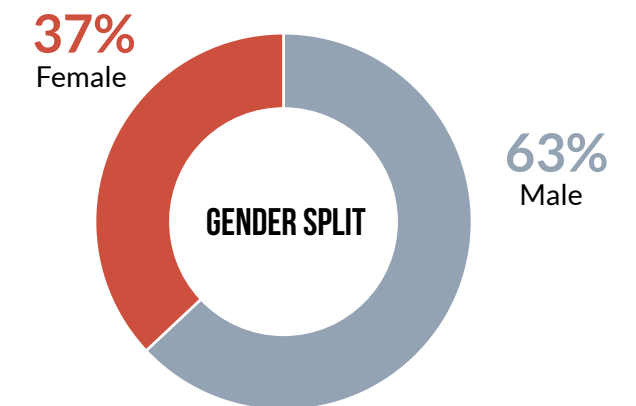
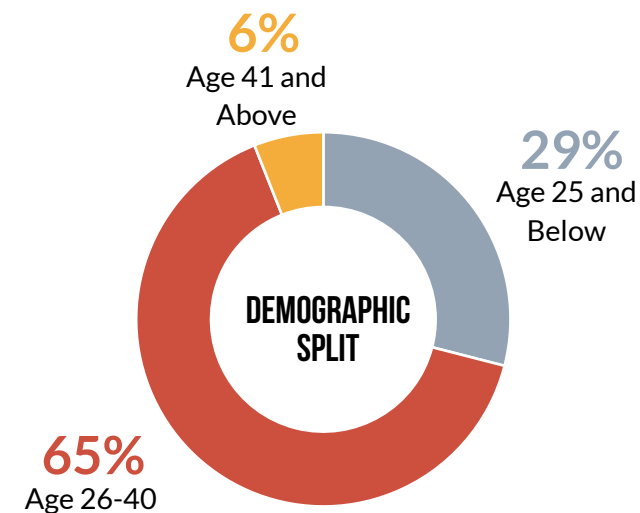
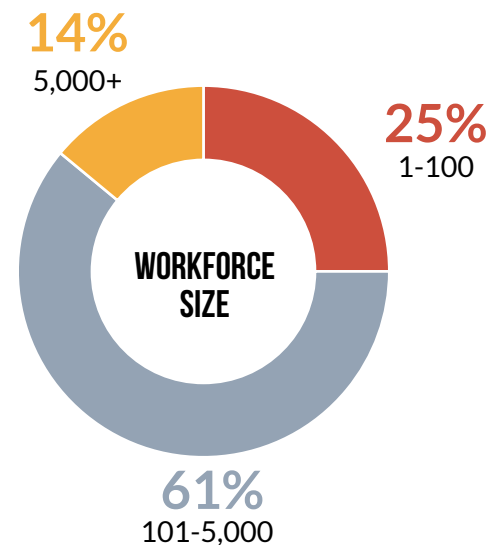
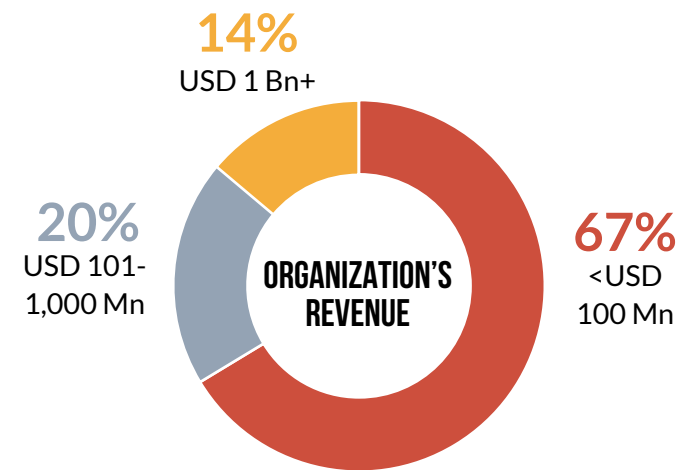
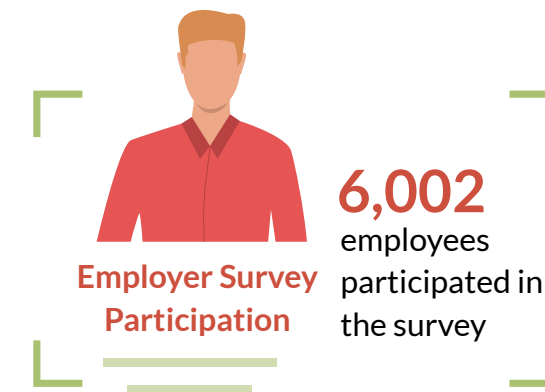
In this context, NASSCOM conducted return to workplace surveys focused on both tech employees and tech employers on their plans on return to workplace. The report dives into the expectations, key considerations, and preparedness on both fronts for return to workplace and further analyzes different future operating models emerging in a hybrid setup.



Return to Workplace in Hybrid Operating Model Survey Respondents' Profile



150+ Organizations Across Tech Industry in India and **6,000+ Employees Participated** in the Survey



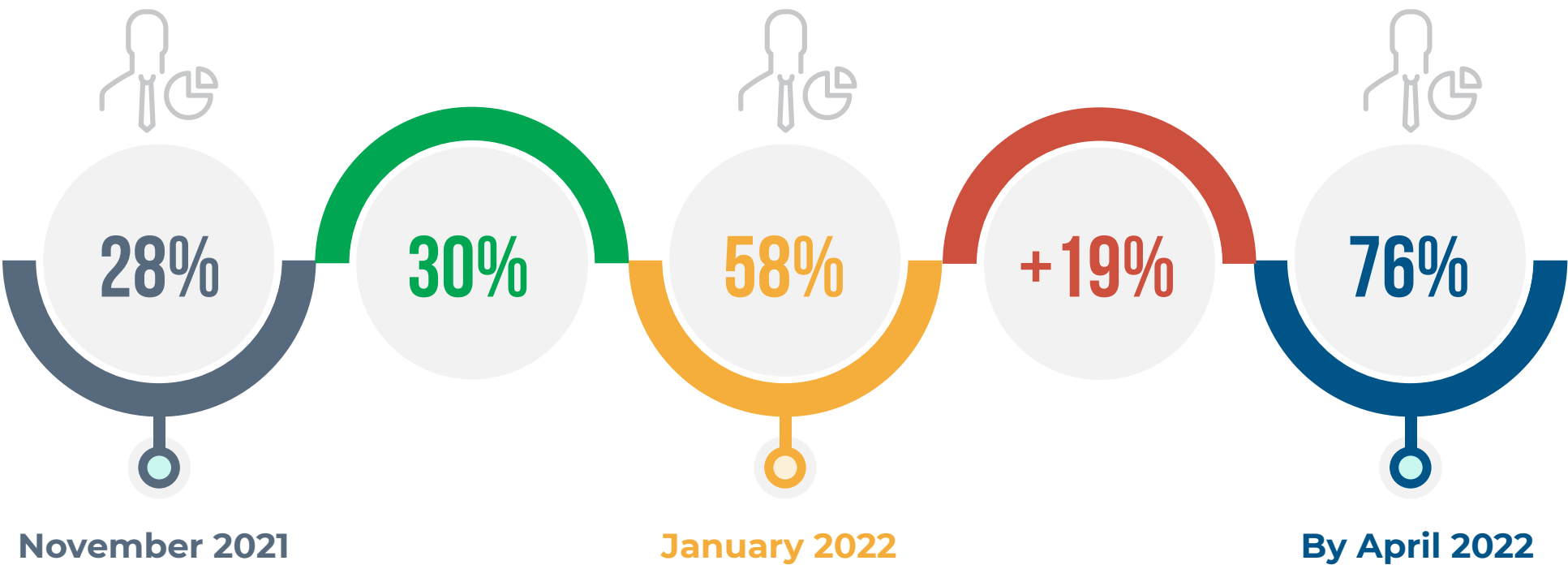
Employees and Employers Equally Interested in Returning to Workplace in a Hybrid Setup, ~50% Workforce to Return to Offices by Jan'22



28% of employees are interested to return to workplace in a month, while **24%** of the workforce would prefer to return to workplace after 6 months

Key Statistics on Employee Interest in Return to Workplace

Cumulative Percentage of Workforce Return to Office Timelines



EMPLOYEE PERSPECTIVE ON RETURN TO WORKPLACE

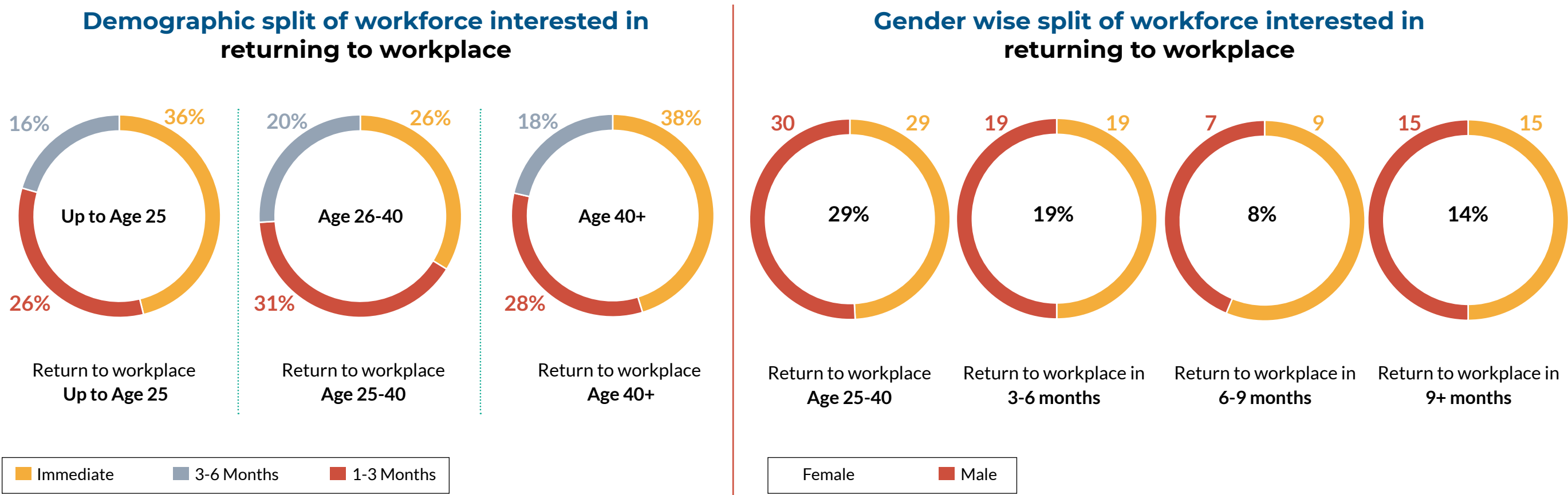
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Workforce <26 and >40 Years (Junior and Senior Management) Want to Return to Workplace Sooner



Employees up to the **age of 25** are most likely to return to workplace by Nov'21, followed by employees **aged 40+**. Female workforce in Tech Industry in India is equally interested in Return to workplace.

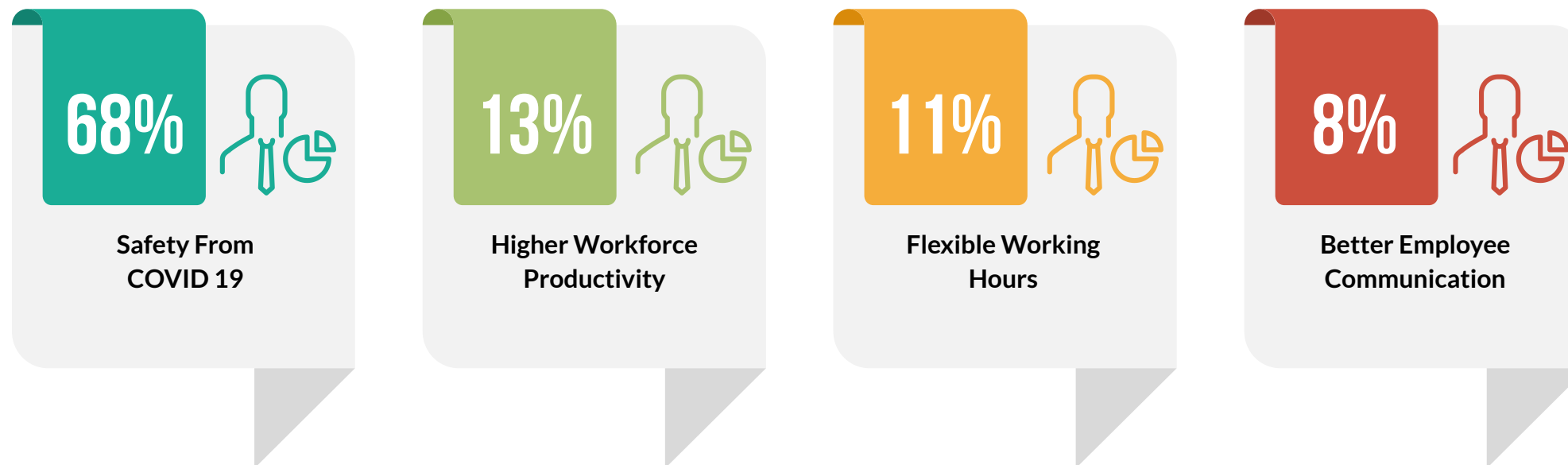


The Great Virtual Working Experiment What Worked and What Didn't



Employees believe that safety from COVID-19, flexible work timings, and better collaboration and communication with supervisors were the three top reasons why they enjoyed remote working

What Worked? Pros and Realized Benefits of Remote Working +



The Great Virtual Working Experiment What Worked and What Didn't



Better Infrastructure and hardware, Alignment with organizational culture, Social connect and bonding with peers, and lesser distractions as compared to WFH are the top four reasons for employee preference to return to workplace

What Didn't? Cons and Impacts of Remote Working

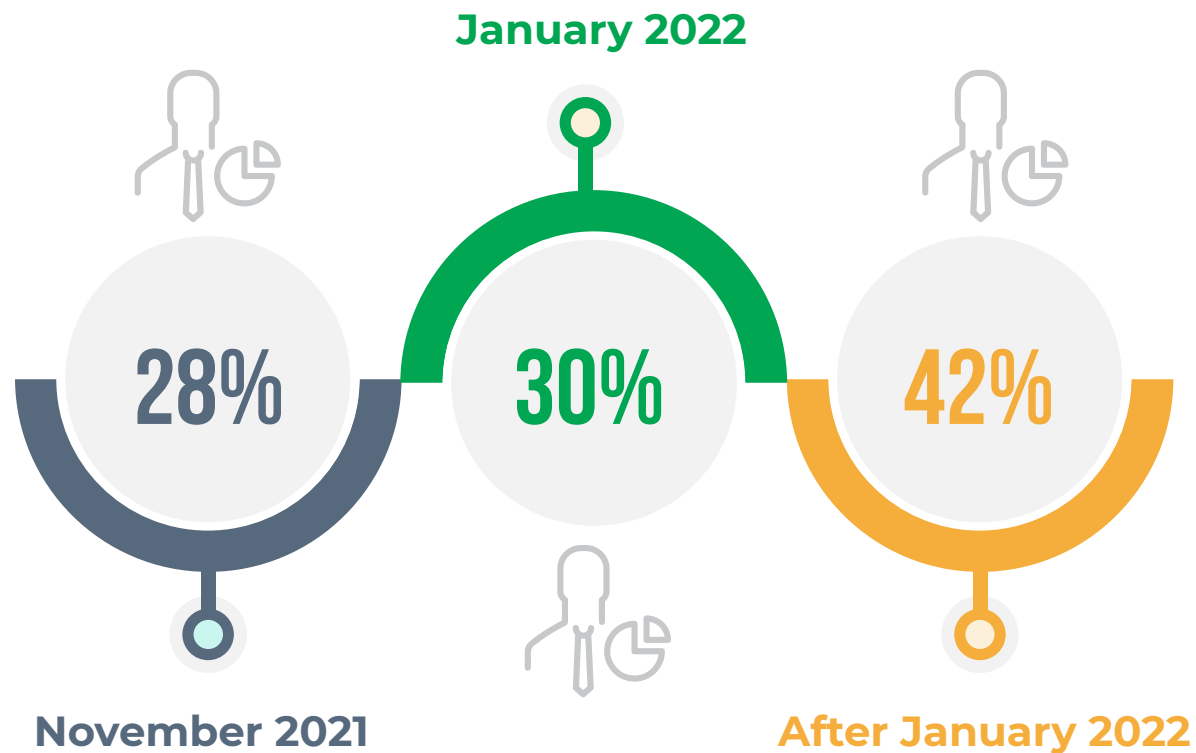


Employees Expect a Return to Workplace Roadmap From Employers, Return to Work Sentiment Varies By Age and Seniority



Employees expect their organization to have a **1-3 month** roadmap to bring workforce back to premises; employees up to age of **25 require** lesser time to return to workplace as compared to others

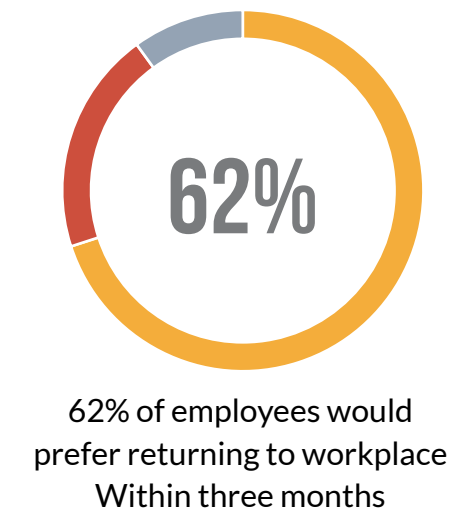
When to Return to Workplace



Employees up to the age of 25 require ~20% lesser time to return to workplace as compared to others

15% of employees are likely to consider change in employer in case of return to workplace

Employee Return to Workplace Sentiment – Survey Findings



EMPLOYEE PERSPECTIVE ON RETURN TO WORKPLACE

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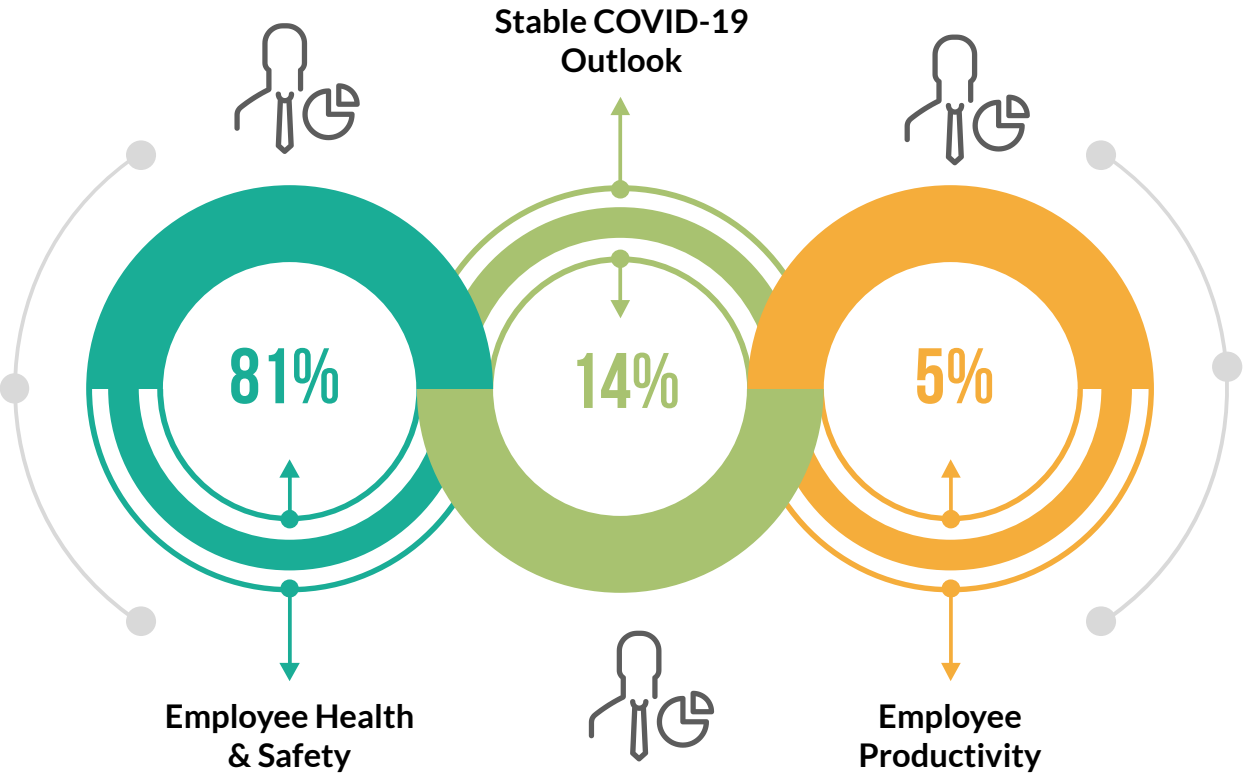


Health & Safety Remains the Foremost Consideration for Return to Workplace from an Employer Perspective

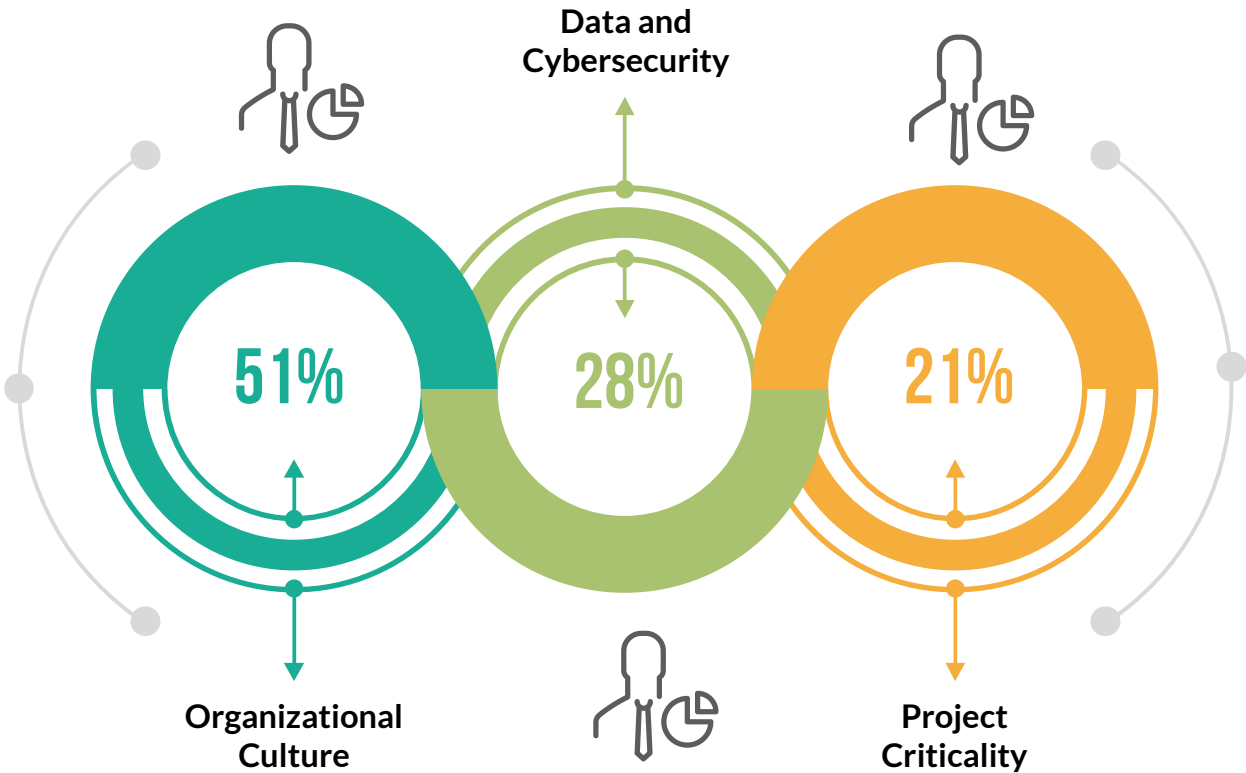


Employee health & safety remains the key workforce consideration for return to workplace, voiced by over **81%** of organizations, followed by followed by stable **COVID-19** outlook and employee productivity

Key Workforce Related Considerations for Employers for Return to Workplace Planning



Key Organizational Considerations for Employers for Return to Workplace Planning

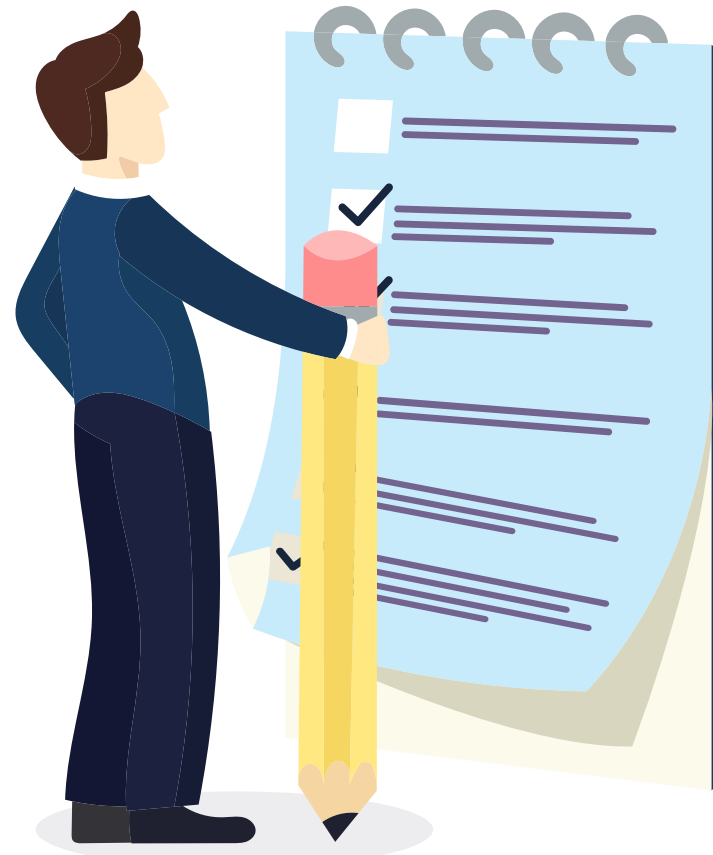
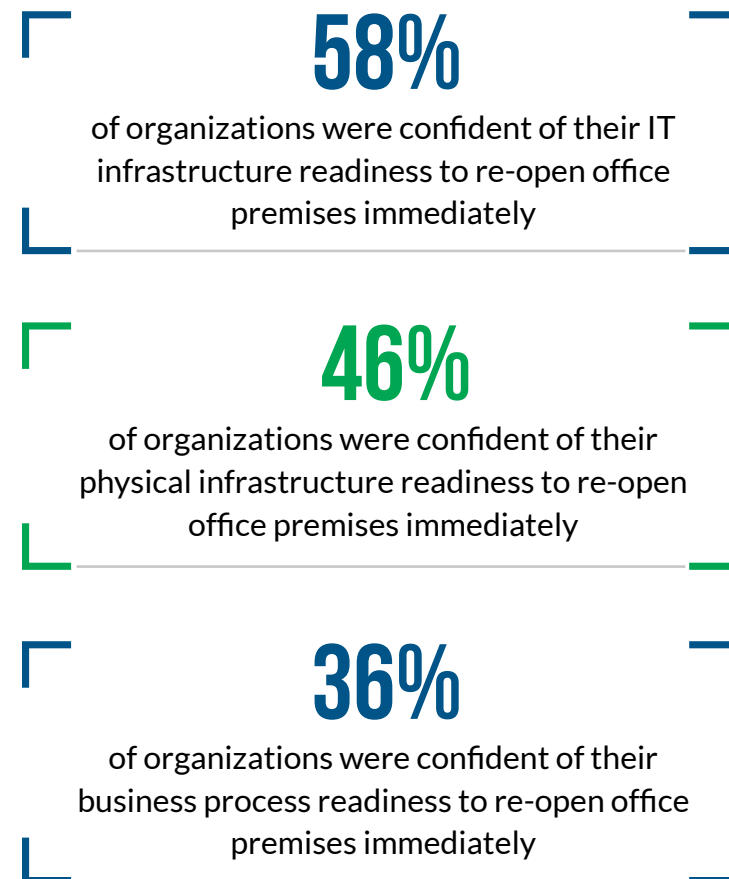




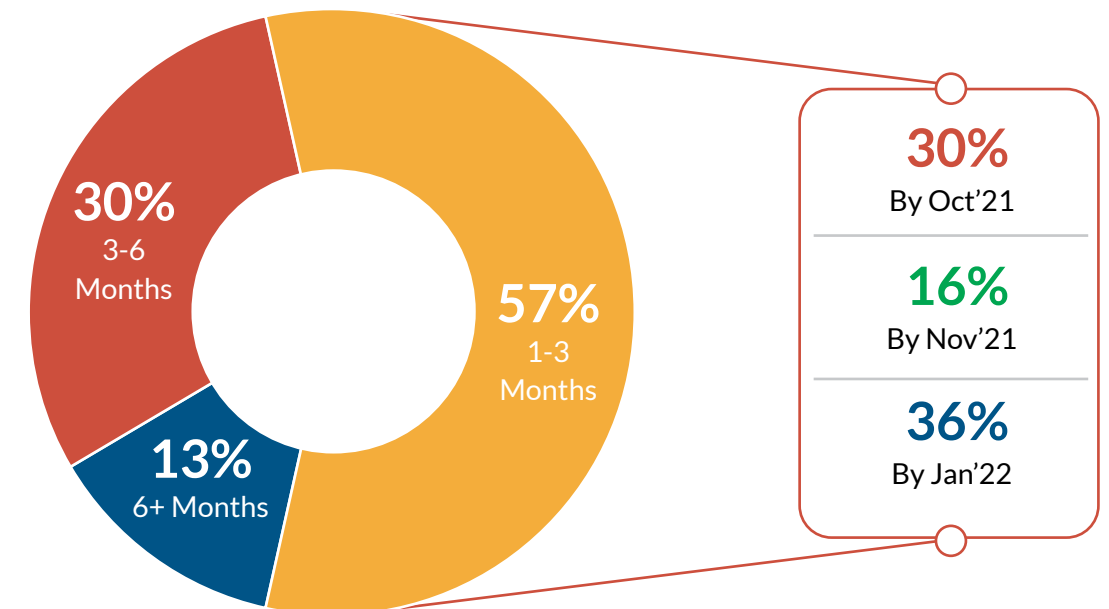
Organizational Plan for Return to Workplace

~**57%** of organizations will reach readiness to re-open office spaces within **3 months**, ~**72%** of organizations looking at up to **50%** of their workforce returning to office in 2021

NASSCOM Return to Workplace Survey Findings



Time for Return to Workplace



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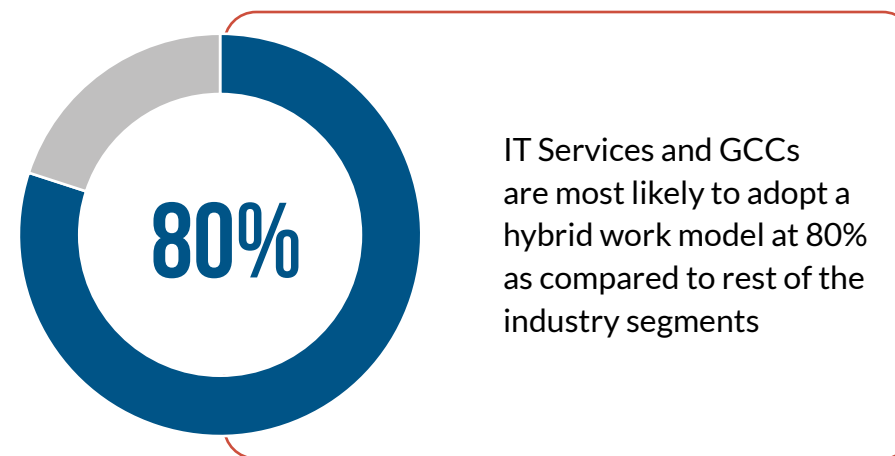
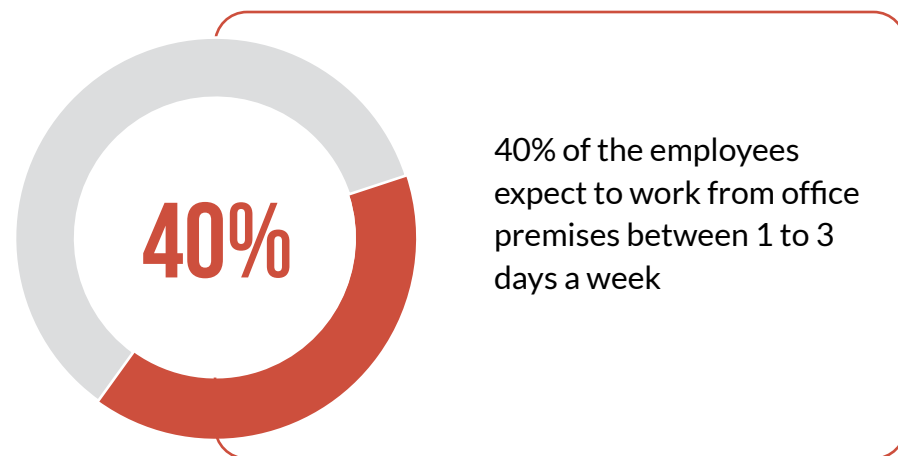
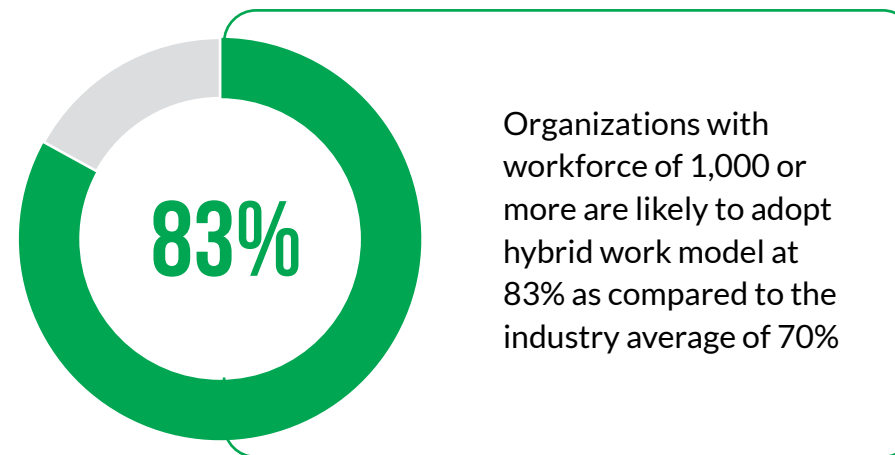
EVOLVING HYBRID OPERATING MODELS



Future of Work Outlook For Tech Industry in India - 70% of Organizations are Looking at Hybrid Work Models



Key Considerations of Return To Workplace





Framework For Identifying Hybrid Work Model Fit Based On Organizational Preparedness and Business Model- (1/3)

The ability to seamlessly transition to an all on-site model or an all remote model based on situational advantage will be provide a key long-term competitive edge to early adopters

Criticality Metrics of Key Considerations For Hybrid Operating Model and Return to Workplace

	Mostly On-site >50% of Workforce	Ideal Scalable and Fungible Hybrid Work Model	Mostly Remote >50% of Workforce
Stakeholder Mandates	High	High	High
COVID-19 Readiness	High.	Moderate	Low
Organizational IT & Physical Infrastructure	Moderate	High	High
Workforce and Business Process Readiness	Moderate	Low	Moderate
Organizational Culture	Low	Moderate	High.

High Criticality
 Moderate Criticality
 Low Criticality



Framework For Identifying Hybrid Work Model Fit Based On Organizational Preparedness and Business Model- (2/3)

There is no one approach fits all – Organizations will need to assess their requirements and identify the right operating model suitable for them based on the factors most critical to their individual business models

	Mostly On-site Hybrid (>50% of Workforce)	Ideal Scalable and Fungible Hybrid Work Model	Mostly Remote Hybrid (>50% of Workforce)
Stakeholder Mandates	<ul style="list-style-type: none"> Local Authority Guidelines 	<ul style="list-style-type: none"> Client Mandates Government Mandates Local Authority Guidelines 	<ul style="list-style-type: none"> Client Mandates Government Mandates
COVID-19 Readiness	<ul style="list-style-type: none"> Thermal entry scanning Germ free / virus free office with sanitization Provision for vehicle / digital asset sanitization on access points SOPs for pantry, cab and allied operations Traceability of employee movement within office premises Restricted zoning access to employees Phased plan for return to work plan COVID scenario handling and Isolation rules / guidelines of suspected COVID cases 	<ul style="list-style-type: none"> IT Infrastructure Readiness Digital Asset Security and Repair/Replacement Protocols 24/7 Employee Support Helpline Thermal entry scanning Germ free / virus free office with sanitization Provision for vehicle / digital asset sanitization on access points SOPs for pantry, cab and allied operations Traceability of employee movement within office premises Restricted zoning access to employees Phased plan for return to work plan COVID scenario handling and Isolation rules / guidelines of suspected COVID cases 	<ul style="list-style-type: none"> IT Infrastructure Readiness Digital Asset Security and Repair/Replacement Protocols 24/7 Employee Support Helpline

Pre-Requisites / Must have



Framework For Identifying Hybrid Work Model Fit Based On Organizational Preparedness and Business Model- (3/3)

In addition to the pre-requisites of return to workplace, the organizations need to closely re-assess their strengths and preparedness across parameters such as infrastructure, workforce, business processes, and organizational culture

	Mostly On-site Hybrid (>50% of Workforce)	Ideal Scalable and Fungible Hybrid Work Model	Mostly Remote Hybrid (>50% of Workforce)
Organizational IT & Physical Infrastructure	<ul style="list-style-type: none"> Physical Space Readiness for social distancing COVID-19 compliant Floor plan 	<ul style="list-style-type: none"> IT Infrastructure Readiness Physical Space Readiness for social distancing COVID-19 compliant Floor plan Digital collaboration ready physical spaces 	<ul style="list-style-type: none"> IT Infrastructure Readiness Digital collaboration ready physical spaces
Workforce and Business Process Readiness	<ul style="list-style-type: none"> Workforce Readiness – Vaccination and Excitement to Return Well defined synchronous communication Model 	<ul style="list-style-type: none"> Manager / Supervisor training to lead and manage hybrid teams Digital Processes to Manage and Monitor Work Processes Clearly defined evaluation metrics Workforce Readiness – Vaccination and Willingness to Return Identification of location independent job roles and business clusters Digital creativity and innovation platforms 	<ul style="list-style-type: none"> Manager / Supervisor training to lead and manage hybrid teams Digital Processes to Manage and Monitor Work Processes Clearly defined evaluation metrics Digital creativity and innovation platforms
Organizational Culture	<ul style="list-style-type: none"> Well defined synchronous communication Model 	<ul style="list-style-type: none"> Well defined synchronous communication Model Flexible and agile asynchronous Communication Model Digital collaboration and innovation ready physical and virtual spaces 	<ul style="list-style-type: none"> Flexible and agile asynchronous Communication Model

Return to Workplace

Beyond or Along COVID-19?

Transitioning to the Hybrid Work Model For Organizations

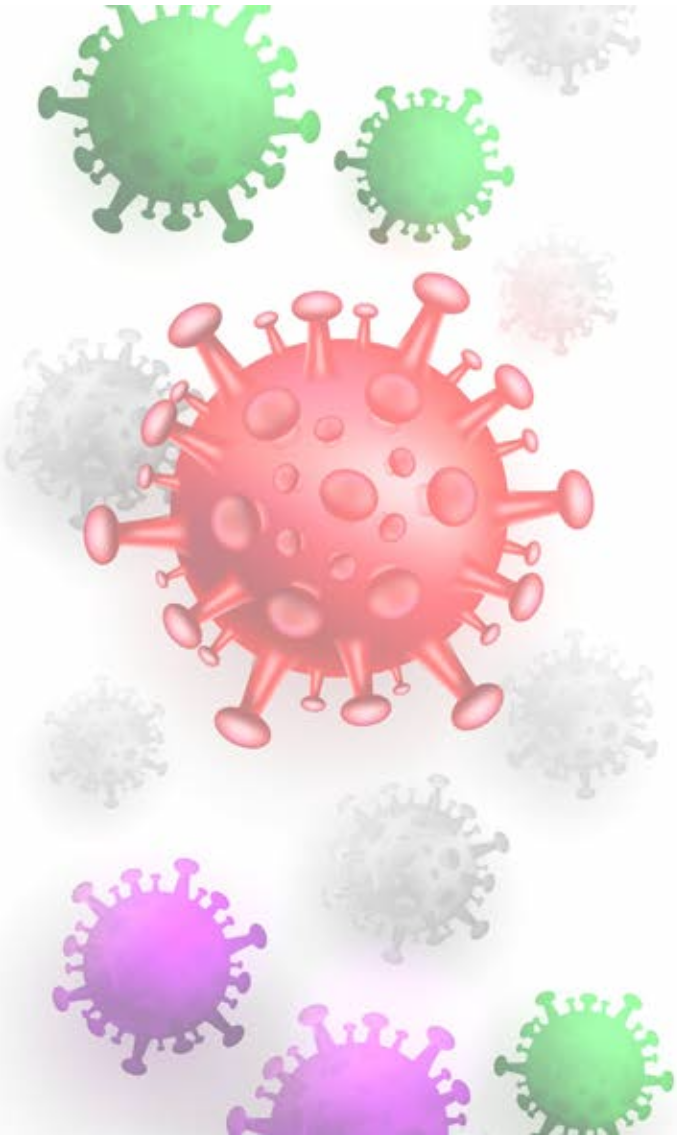
How to Shift to a Mostly On-site Operating Model



From COVID Induced Remote Working
Quickly leverage distributed sources rather empowered materials.

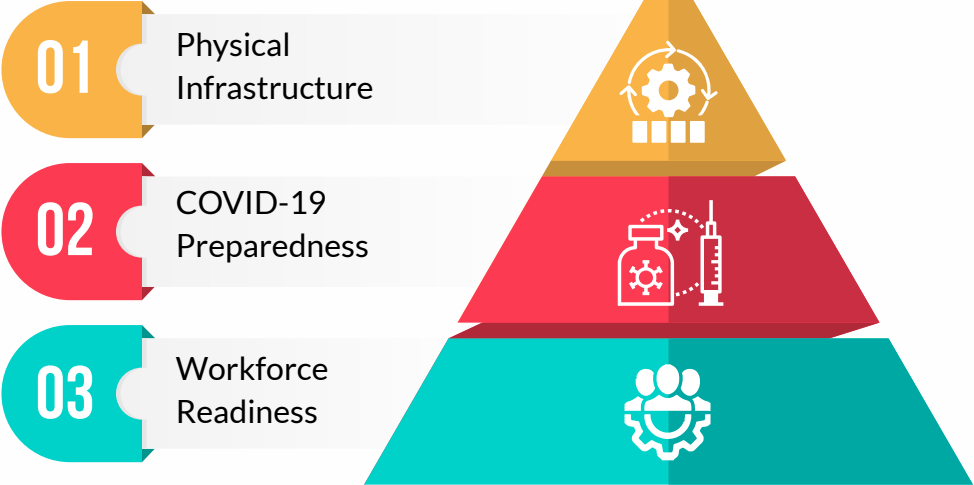


To Mostly On-Site Operating Model
Quickly leverage distributed sources rather empowered materials.



Despite high level of preparedness to resume operations from physical workspaces, organizations are taking a cautious approach with only 25% of organizations planning for 50% or more of workforce returning to office in 2021

Key Focus Areas



ORGANIZATIONS NEED TO ACTIVELY COMMUNICATE WITH EMPLOYEES THE NEED AND MERITS OF RETURN TO WORKPLACE AND MANAGE EMPLOYEE EXPECTATIONS.

Return to Workplace

Beyond or Along COVID-19?

Transitioning to the Hybrid Work Model For Organizations

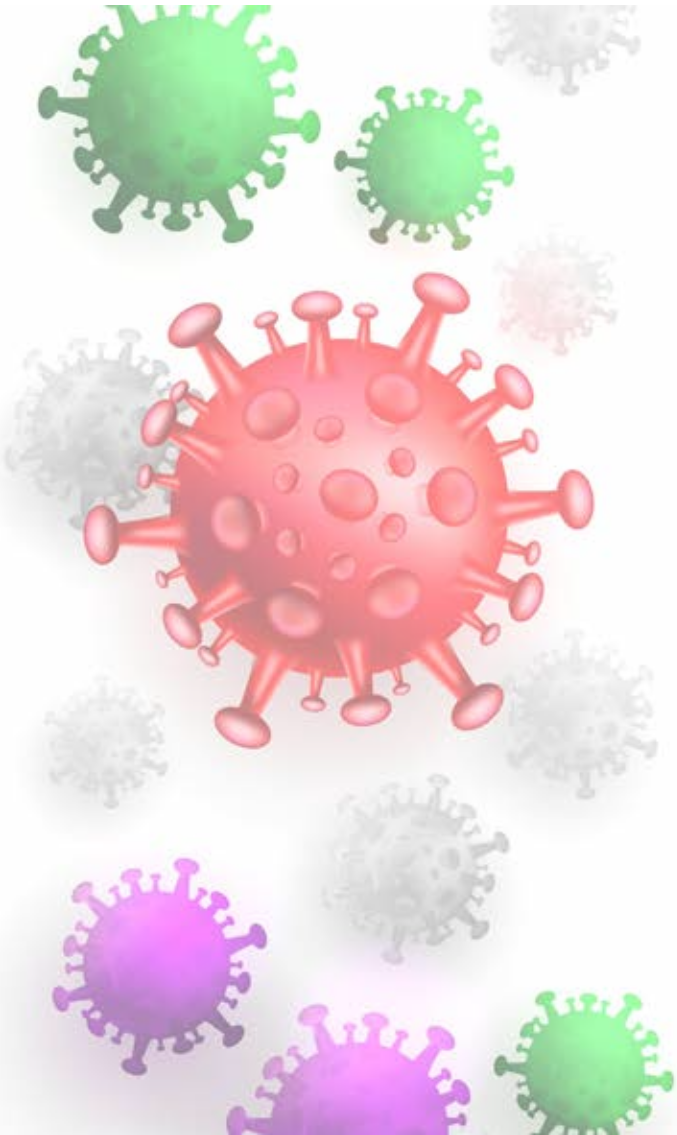
How to Shift to a Mostly Remote Operating Model



From COVID Induced Remote Working
Quickly leverage distributed sources rather empowered materials.

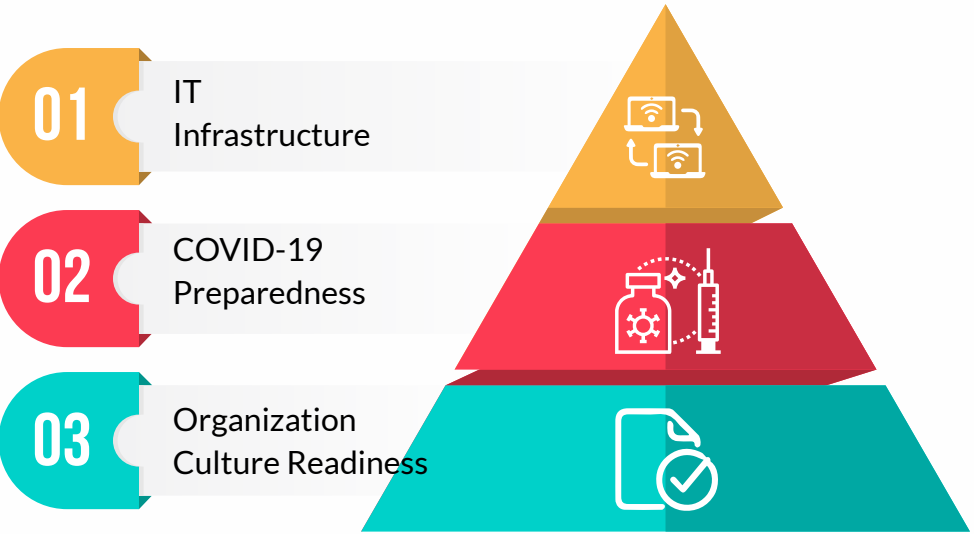


To Mostly On-Site Operating Model
Quickly leverage distributed sources rather empowered materials.



70% of tech organizations in India are looking at adopting a Hybrid Work Model with GCCs most likely to adopt a 'mostly remote' operating model

Key Focus Areas



ORGANIZATIONS NEED TO ACTIVELY INVEST IN TRAINING MANAGERS AND SUPERVISORS TO LEAD TEAMS IN A DISTRIBUTED SETUP, AND RE-SKILL THE WORKFORCE TO LEVERAGE TECHNOLOGY FOR EFFICIENT VIRTUAL COLLABORATION

NASSCOM[®] RECOMMENDATIONS



RECOMMENDED

NASSCOM Recommendations on Transitioning to a Hybrid Ready Operating Model and Return to Workplace

10 Point Check-list on Hybrid Model Readiness – Organizational Playbook

01

Key Considerations of Return To Workplace

- Client Mandates
- Govt. Mandates
- Local Authority Guidelines

02

Physical Space Readiness

- Physical distancing at workplace
- COVID-19 compliant Floor plan
- Digital collaboration ready physical spaces

03

Workforce Readiness

- Vaccination Status
- Employee Willingness and Preparedness

04

COVID Readiness

- Thermal entry scanning
- Germ free / virus free office with sanitization sprays / UV disinfecting
- Provision for vehicle / digital asset sanitization on access points
- Digital asset cyber security sanitization
- SOPs for pantry, cab and allied operations

05

IT Infrastructure Readiness

- Data Privacy
- Cybersecurity
- Digital Asset Security

06

Robust Communication Model

- Well Defined Synchronous Model
- Flexible and agile asynchronous Communication Model

07

Supporting Infrastructure Readiness

- Preparedness of cab/ transport providers
- Preparedness of vendors / cafeteria and other support functions
- Availability of public transport
- Availability of food and supporting home environment

08

Business Process Readiness

- Digital Processes to Manage and Monitor Work Processes
- Clearly defined evaluation metrics
- Manager / Supervisor training to lead and manage hybrid teams

09

Financial Readiness

- Percentage of asset value locked in real-estate
- Cost Benefit Analysis of WHF vis-à-vis Office operations

10

Readiness on Allied Parameters

- Traceability of employee movement within office premises
- Restricted zoning access to employees and phased return to work
- Special provisions for persons with disabilities
- Workstation allocation for staggered employee visits to office
- COVID scenario handling
- Isolation rules / guidelines of suspected COVID cases

Acknowledgements

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ABOUT



NASSCOM is the premier trade body and chamber of commerce of the Tech industry in India and comprises over 3000 member companies including both Indian and multinational organisations that have a presence in India. Our membership spans across the entire spectrum of the industry from start ups to multinationals and from products to services, Global Service Centers to Engineering firms. Guided by India's vision to become a leading digital economy globally, NASSCOM focuses on accelerating the pace of transformation of the industry to emerge as the preferred enablers for global digital transformation. Our strategic imperatives are to reskill and upskill India's IT workforce to ensure that talent is future-ready in terms of new-age skills, strengthen the innovation quotient across industry verticals, create new market opportunities - both international and domestic, drive policy advocacy to advance innovation and ease of doing business, and build the Industry narrative with focus on Talent, Trust and

Innovation. And, in everything we do, we will continue to champion the need for diversity and equal opportunity. NASSCOM has played a key role in not just the growth of the Industry to become a \$180+Billion industry today, but we have helped establish the Tech industry in India as one of the most trusted partners, globally. NASSCOM continues to make significant efforts in contributing towards India's GDP, exports, employment, infrastructure development and global visibility. Our membership base constitutes over 95% of the industry revenues in India and employs over 4 million professionals, and as technology blends into every aspect of the economy, we expect the industry to become key driver of growth, development and inclusion for the country. Our mission is to make India a global hub for Innovation and Talent so when the world thinks Digital, the world will think India.

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ABOUT



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