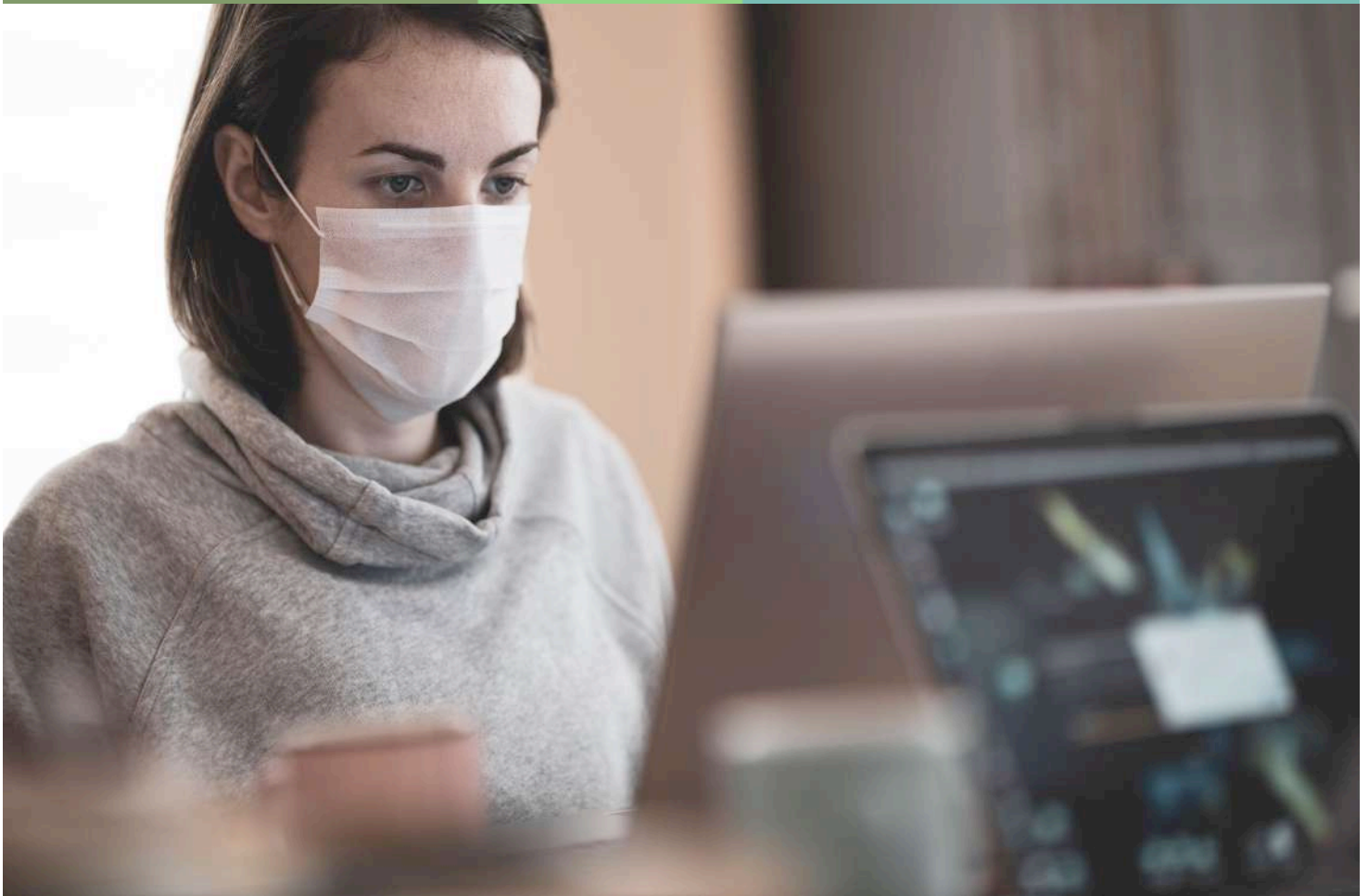# Unlock 1.0

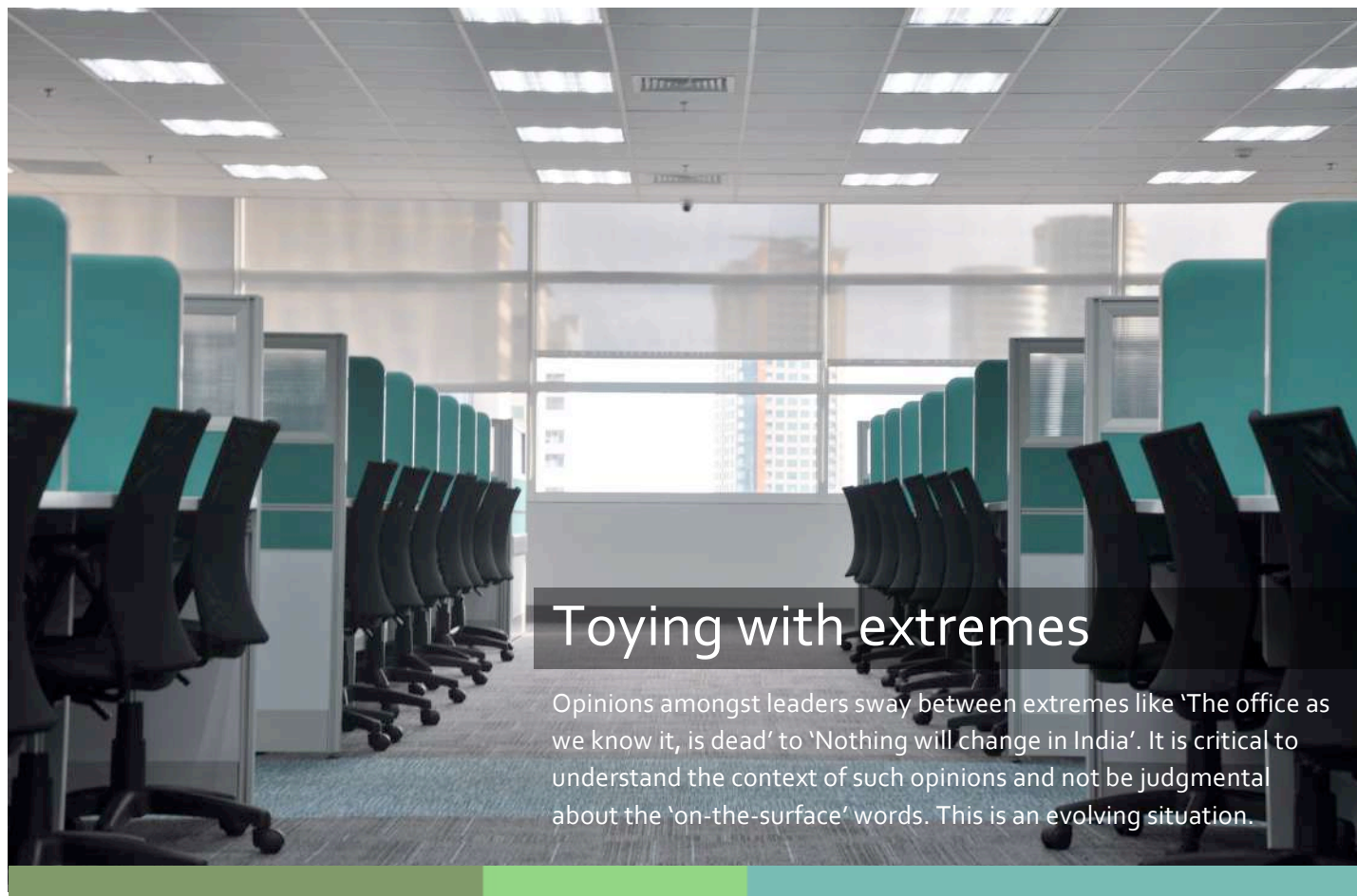## How are workplaces in India adapting?

SURVEY RESULTS

freespace   In association with   IFMA™ India
International Facility Management Association

Toying with extremes

Opinions amongst leaders sway between extremes like 'The office as we know it, is dead' to 'Nothing will change in India'. It is critical to understand the context of such opinions and not be judgmental about the 'on-the-surface' words. This is an evolving situation.

"Workplace trends tend to come and go in cycles. The current pandemic will unleash another cycle, which may last around 3 years."
-A CXO is a large multinational corporation.

Parts of India Inc. began to slowly open to business after lockdowns across the country around the second half of May 2020. Besides business challenges of unprecedented nature, organisations also face a huge challenge of making their workplaces safe for employees to return, as employee wellbeing becomes high priority. Freespace, a UK based Workplace Technology company, engaged iDream to conduct research to understand such challenges better in the Indian context. The team was supported in the endeavor by the Indian arm of the International Facilities Management Association ("IFMA").

Besides other components, the research included:
a)   40 personal interviews with CXOs, CRE leaders & HR leaders
b)   An online survey amongst 120 CRE/FM leaders

This document is a summary of the results from the survey. In the coming days, a white paper will be released for private circulation, encompassing the findings from the research in its totality.
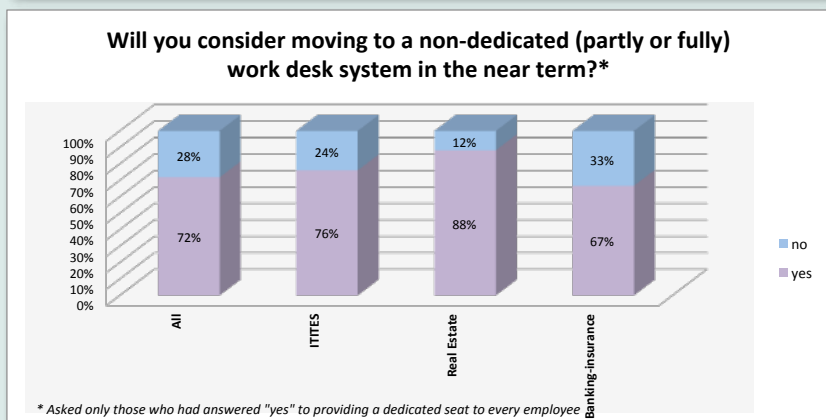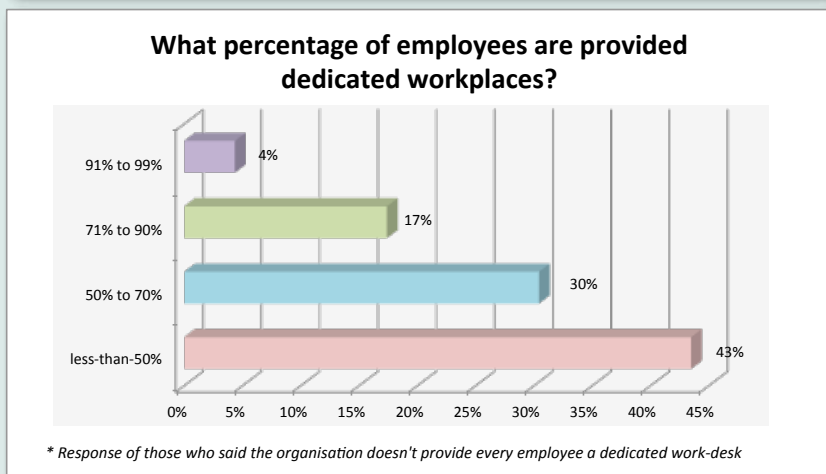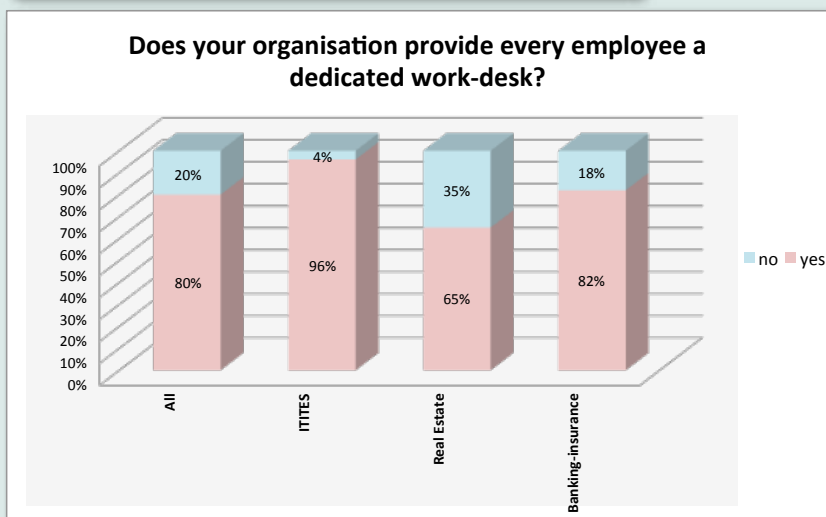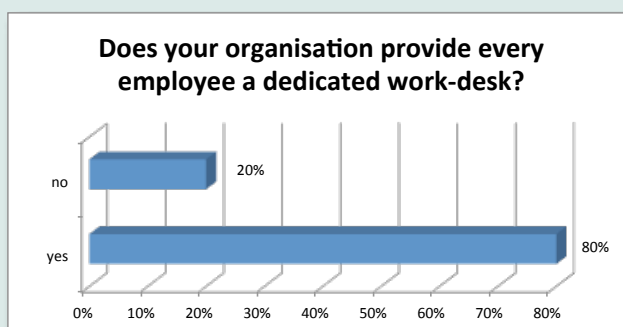
INSIGHTS FOR CO-CREATION

The extent of the impact on business and personal lives by the COVID 19 pandemic is still unknown. The research team believes that the data from the survey can lead to insights that can help organisations co-create solutions, which will help them emerge from the pandemic with an approach to suit their specific requirements. The data is being released to encourage readers to take the path of co-creation.

Freespace has developed a portfolio of technology solutions to help organisations plan, implement and manage new and ongoing workplace strategies that support employees to adopt change. Details of these can be seen at www.afreespace.com/return-to-work/ These solutions are highly customisable and can be used to define company specific strategies. Freespace will be happy to deploy such solutions at client locations. However one size does not fit all. This research would have achieved something if it encourages organisations to come forward and join hands with Freespace and its partners to co-create solutions that are contextually pragmatic and executed at a modest cost.

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A shift in thinking

In practice, in the pre-COVID era, 80% of work desks were dedicated. The mood appears to have changed as a result of the pandemic, with 72% of respondents saying they will consider shifting to flexible seating. It remains to be seen how much of this will come to be practiced.

DEDICATED SEATING VS FLEXIBLE SEATING

Does your organisation provide every employee a dedicated work-desk?

- no 20%
- yes 80%

Does your organisation provide every employee a dedicated work-desk?

	All	ITITES	Real Estate	Banking-insurance
no	20%	4%	35%	18%
yes	80%	96%	65%	82%

What percentage of employees are provided dedicated workplaces?

- 91% to 99% — 4%
- 71% to 90% — 17%
- 50% to 70% — 30%
- less-than-50% — 43%

*Response of those who said the organisation doesn't provide every employee a dedicated work-desk

Will you consider moving to a non-dedicated (partly or fully) work desk system in the near term?*

	All	ITITES	Real Estate	Banking-insurance
no	28%	24%	12%	33%
yes	72%	76%	88%	67%

* Asked only those who had answered "yes" to providing a dedicated seat to every employee

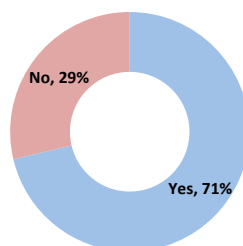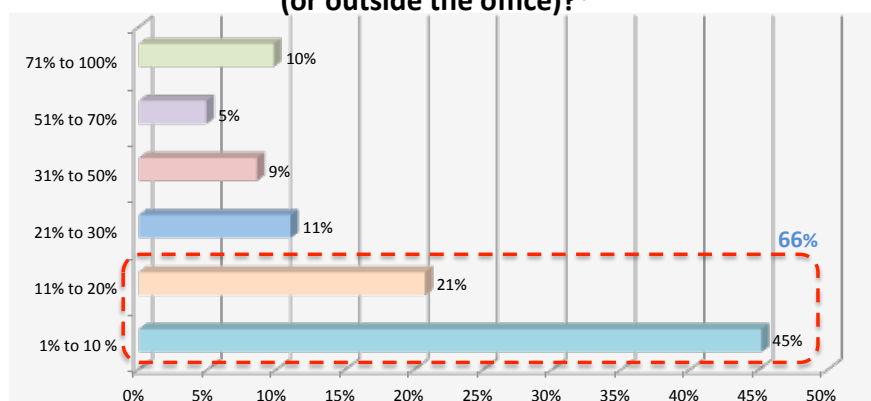freespace

WORK FROM HOME (Pre-COVID)

Not more than 20% of employees work from home amongst 66% of respondents.

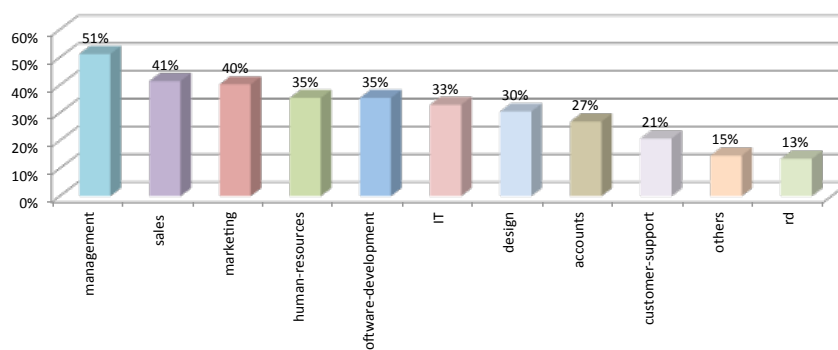### Do workers work from home or a place of their choice once in a while?

No, 29%

Yes, 71%

At any point in time during normal times, approx what % of workers work from home (or outside the office)?*

Range	Value
71% to 100%	10%
51% to 70%	5%
31% to 50%	9%
21% to 30%	11%
11% to 20%	21%
1% to 10%	45%

66%

Response of only those who said workers work from home or a place of their choice once in a while

From which departments do you usually see most 'work from home' incidents?

Department	Value
management	51%
sales	41%
marketing	40%
human-resources	35%
software-development	35%
IT	33%
design	30%
accounts	27%
customer-support	21%
others	15%
rd	13%

Respondents were asked to respond on the basis of their pre lockdown experience, and the above three graphics are reflective of that. It is quite likely that these numbers will change drastically for the next 6-9 months.
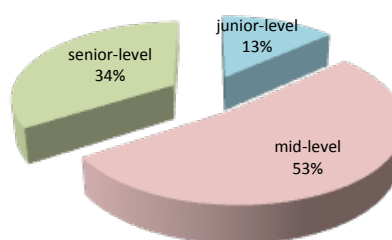
One size does not fit all.

While a medium to long-term work-from-home policy needs to be primarily based on the work type, it is also pertinent to be sensitive and consider the ability and willingness of individual employees as such policies are rolled out.

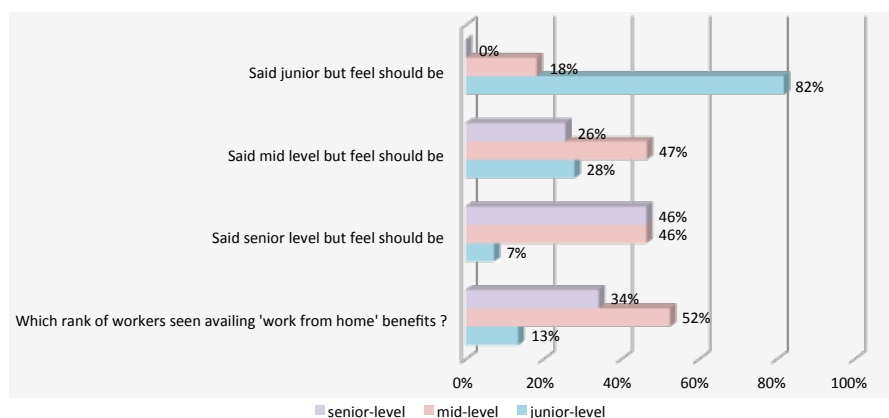freespace

WORK FROM HOME (pre-COVID)

More than 50% of respondents indicated that it is the mid-level employees who work from home most of the time.

### Which rank of workers are seen availing 'work from home' benefits most of the time?

junior-level
13%

senior-level
34%

mid-level
53%

Which rank of workers are seen availing 'work from home' benefits most of the time?

|	senior-level	mid-level	junior-level
Said junior but feel should be	0%	18%	82%
Said mid level but feel should be	26%	47%	28%
Said senior level but feel should be	46%	46%	7%
Which rank of workers seen availing 'work from home' benefits ?	34%	52%	13%

A general hypothesis indicates that it is the youngsters (Gen Z) who are willing and able to effectively work from home. The survey was run amongst senior and mid-senior leaders within organization, and the charts above however do not support this hypothesis. In discussions, it also emerged that 'trust' also plays a role. In general it is felt that when a senior leader is working from home, he/she is actually 'working'; the same may not be true for Gen Z employees. A peripheral factor is the level of experience; there appears to be a feeling that Gen Z employees are more efficient with constant feedback, which works better when they are around their reporting managers.

However efficiency and innovation are often at opposite ends, and the need of the times may be creative thoughts, amongst knowledge workers, over efficiency. Secondly, it is also pertinent to hear the juniors' viewpoint before enforcing any 'work-from-home' policy.
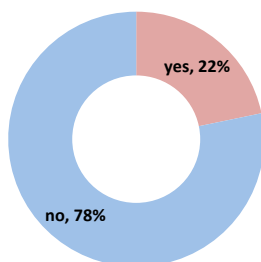
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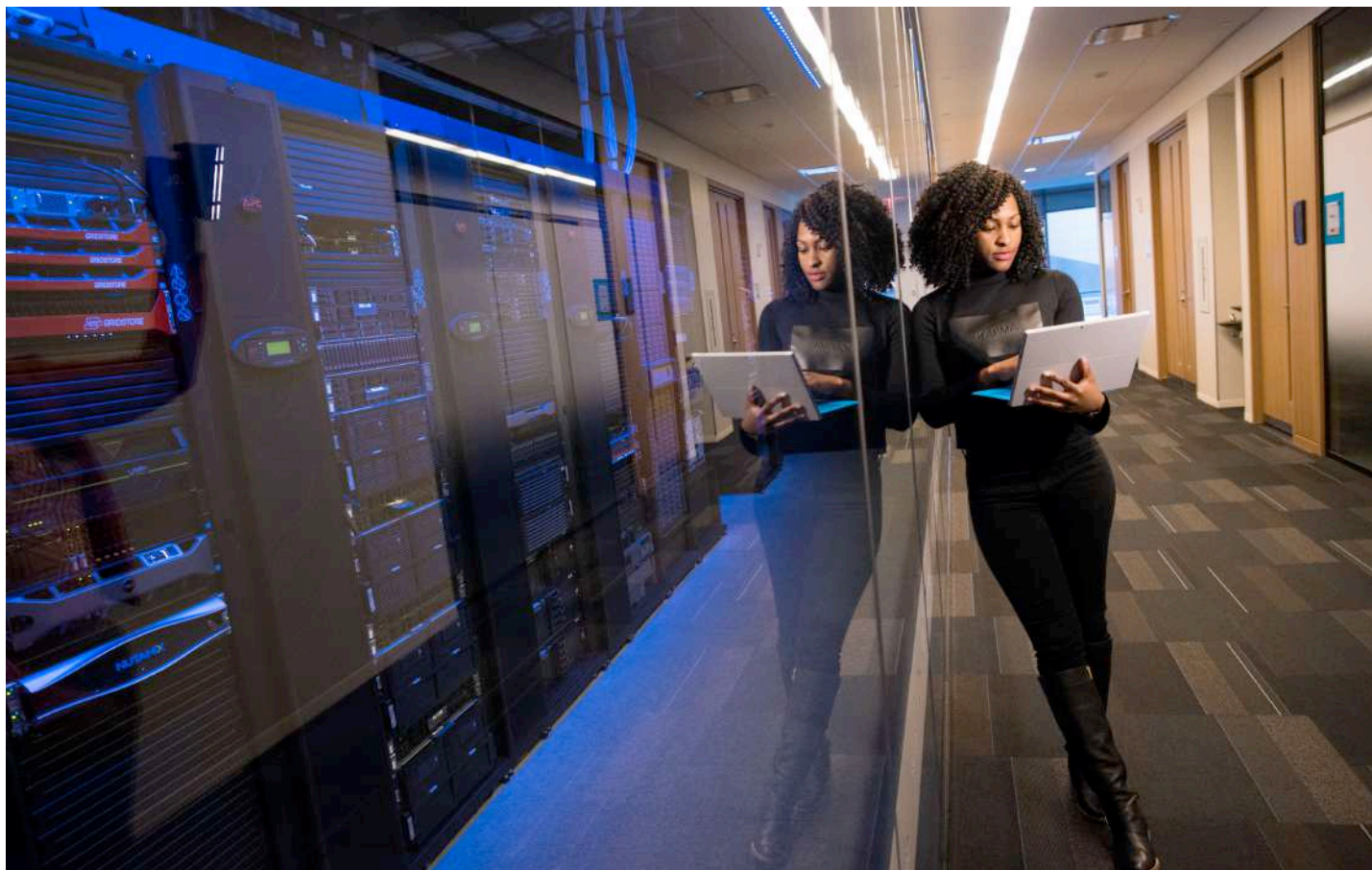
Do you have any tech tool/program/ dashboard for booking work desks (non dedicated) by workers?*

No, 100%
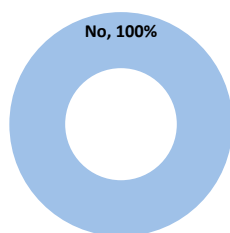
Only those who do not provide every employee a dedicated work-desk responded

Do you have any tech tool/program/ dashboard for 'occupancy monitoring'?*

yes, 22%

no, 78%

Only those who do not provide every employee a dedicated work-desk responded

TECHNOLOGY

*22% of organisations that do not provide **every** (may provide to 'some') employee a dedicated workplace use occupancy monitoring tech tools.*

The ability to pre-assign a 'safe/clean' seat at the workplace has many significant advantages, and becomes particularly important in employee health & safety in the current times.

Occupancy monitoring becomes even more important than before as 100% occupancy is unlikely to be seen in most offices for several months to come. Real time data, analysed periodically, not only builds in agility, but will also help craft a blueprint for future workplace requirements.

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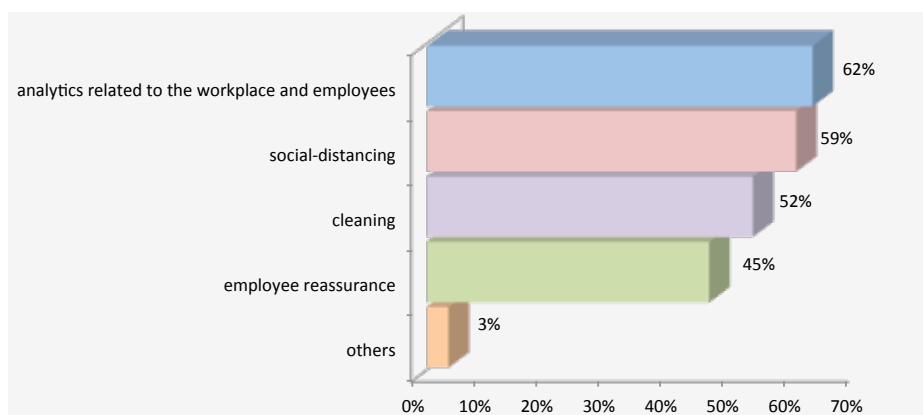### What is your biggest concern about deploying new technology?

training, 3%

can't say, 3%

other, 1%

privacy, 19%

risk-of-success, 23%

cost, 50%
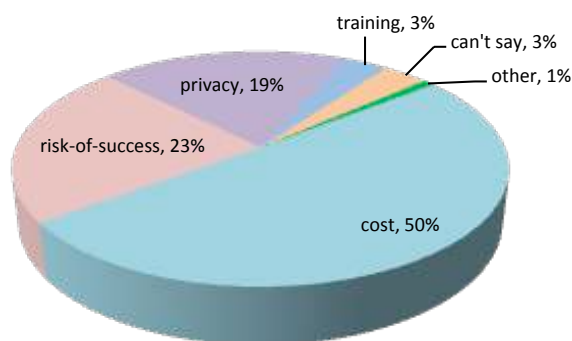
TECHNOLOGY
50% of respondents fear that technology costs, combined with the risk of success many not elicit justifiable gains.

Tech tools can be helpful in achieving a faster return to work. Given a choice, in which areas will you want tech to come to your organisation's help the MOST?

- analytics related to the workplace and employees — 62%
- social-distancing — 59%
- cleaning — 52%
- employee reassurance — 45%
- others — 3%
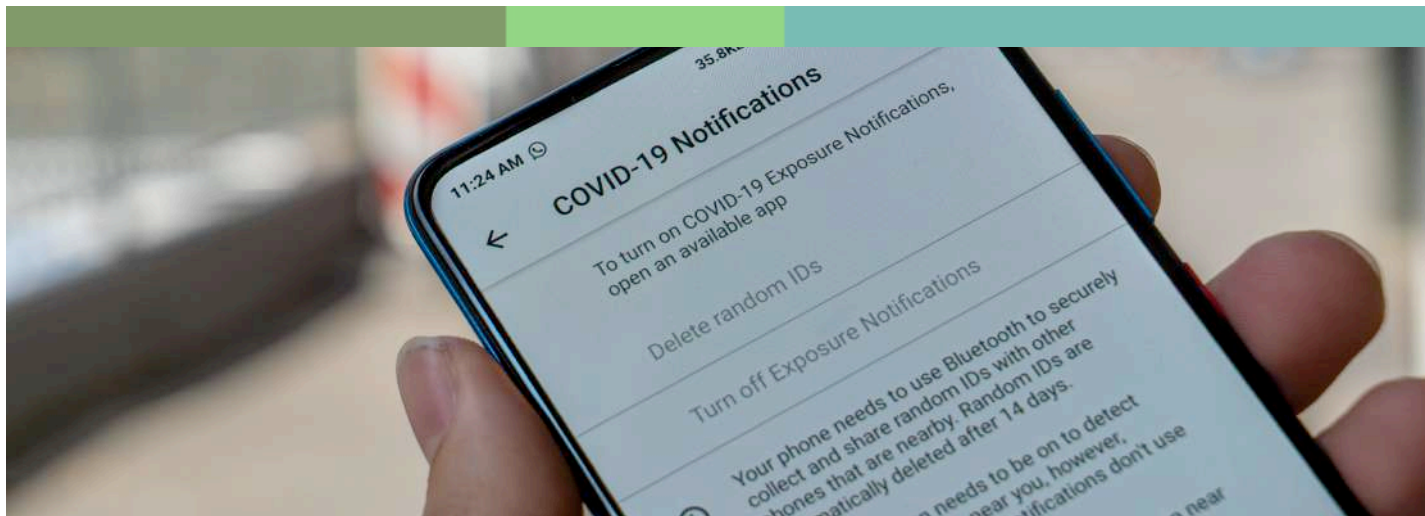
0% 10% 20% 30% 40% 50% 60% 70%

Interviewees highlighted that top priorities for organisations include the health & safety of employees and survival of the organization due to the financial downturn unleashed by the pandemic. Cost pressures are high. Certain 'good to have' practices in the pre-COVID era, especially related to health and safety, have suddenly become 'must haves', further increasing cost pressure. In such a scenario, there is general apprehension about organizational spending on anything new. This is however contrary to the realization that the current extraordinary times will require some extraordinary measures to be taken, and this may include 'taking bets' on tech tools from players who have been tried and tested. While doing so, it is important to adopt tools that are customizable and can be adapted to an individual organisation's context and fulfill its unique requirements. 'Off the shelf' buying of tech tools is unlikely to elicit desired results.

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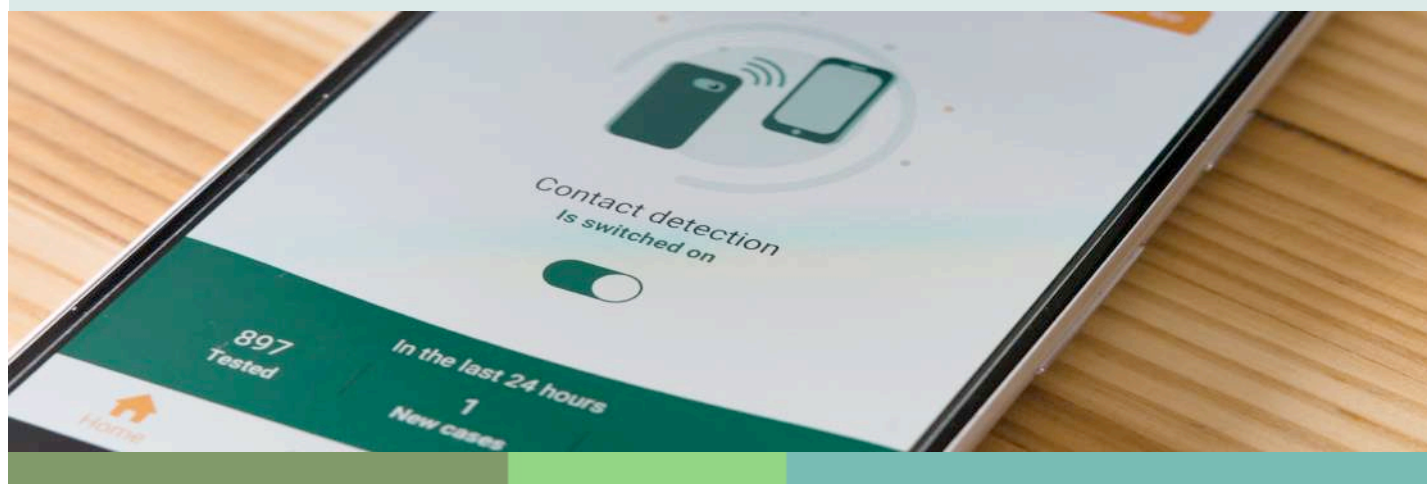
COMMUNICATION, HYGIENE

"The customerisation of employees has been accelerated. We now look at them the way we have looked at our customers" –A CXO

What modes of communication do you think will be effective in sensitizing employees?

- posters signages across the workplace — 82%
- email and other company-wide messaging at regular intervals — 69%
- videos across screens at regular intervals on screens across the workplace — 59%
- articles, videos on internal blogs & microsites — 33%
- others — 10%
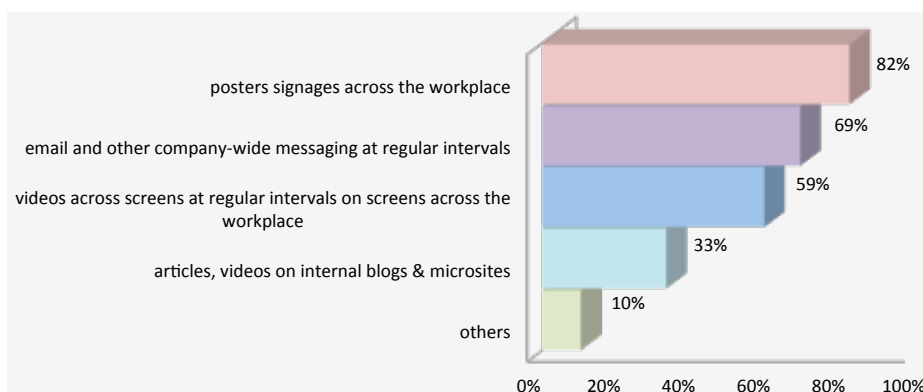
How do you think you can achieve consistent higher degrees of hygiene amongst employees at the workplace?

- hand sanitisation facewash at entry-exit points — 73%
- an extra round of cleaning the premises perhaps during lunch-break — 68%
- immediate post-use-cleaning of furniture, fixtures & equipment — 51%
- ban eating at desks — 43%
- replace rough dust-attracting surfaces with glossy,easytoclean miteproof surfaces — 25%
- do away with personalised desks as this attracts clutter — 23%
- others — 10%

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CHANGES AT THE WORKPLACE

Retrofit of existing facilities appears to be the last thing on people's mind right now as cost pressures mount. Monitoring the performance and wellbeing of employees as well as the existing workpl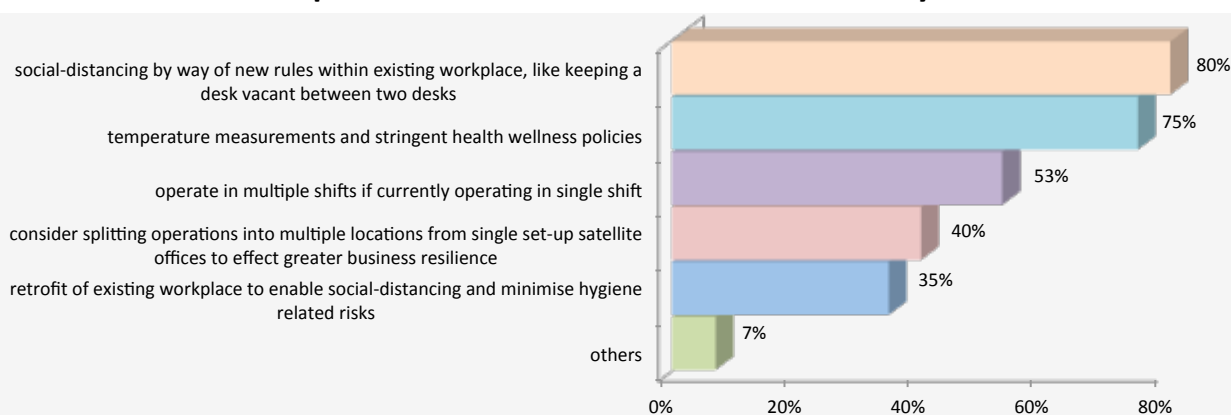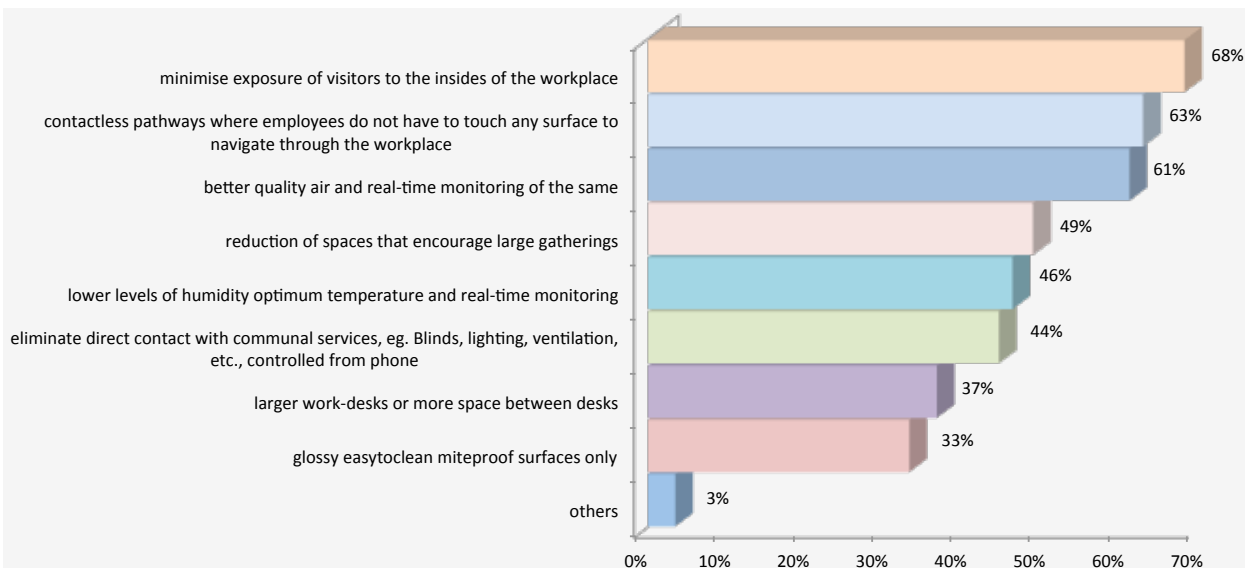aces appears to be the mantra that interviewees spoke about. Manual methods and tech tools can help monitor workplace performance whereas deeper human centric HR interventions will help monitor employee wellbeing. Data collected over a period of 6-12 months will go a long way in creating a framework for the future.

What operational restructuring are you likely to 'consider' at the workplace to effect a faster return to normalcy?

Category	Percentage
social-distancing by way of new rules within existing workplace, like keeping a desk vacant between two desks	80%
temperature measurements and stringent health wellness policies	75%
operate in multiple shifts if currently operating in single shift	53%
consider splitting operations into multiple locations from single set-up satellite offices to effect greater business resilience	40%
retrofit of existing workplace to enable social-distancing and minimise hygiene related risks	35%
others	7%

What design changes would you like to see within your workplaces if you had to get them redesigned?

Category	Percentage
minimise exposure of visitors to the insides of the workplace	68%
contactless pathways where employees do not have to touch any surface to navigate through the workplace	63%
better quality air and real-time monitoring of the same	61%
reduction of spaces that encourage large gatherings	49%
lower levels of humidity optimum temperature and real-time monitoring	46%
eliminate direct contact with communal services, eg. Blinds, lighting, ventilation, etc., controlled from phone	44%
larger work-desks or more space between desks	37%
glossy easytoclean miteproof surfaces only	33%
others	3%

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*"In the new era, only those who 'need to go' to the workplace will go, and only **when** they need to and able to go."*
-A COO is a large multinational corporation.
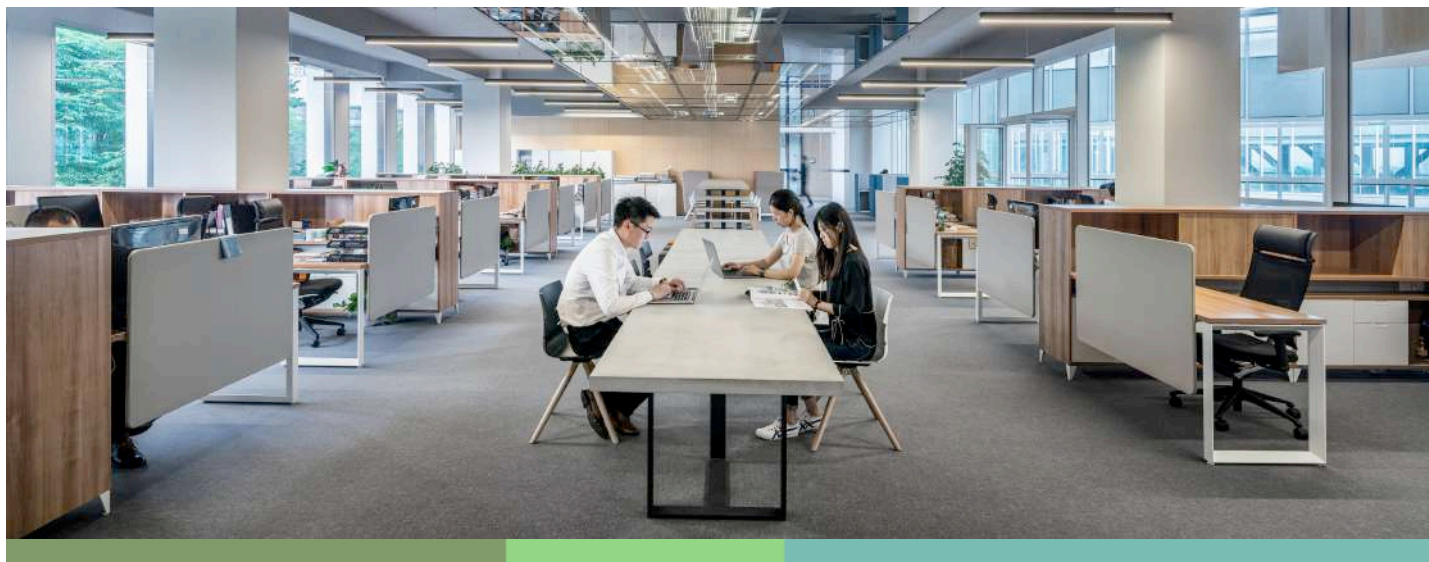
This report is largely a summary of responses to an online survey carried out during mid May 2020. These results show the organisations perspective and not the end users viewpoints, and are only partly reflective of the ongoing research project that comprises of the following additional components:

a) Interviews with CXOs and CRE/HR leaders
b) Upcoming survey to understand end user (i.e. office go-er) perspective
c) Insights to be drawn from the interviews and Surveys

A white paper will be published for private circulation at the end of the above. It is believed that that this will help create a framework for co-creation of new, practical and inexpensive products and solutions that will help organisations become more agile than before and transition to a dynamic world of work. It is the firm belief of the researchers that the dynamic nature of the world of work is complex, multi-layered and needs to be approached by mapping the entire workplace management eco-system comprising of HR, IT, CRE and Management. This not only calls for deeper collaboration between product manufacturers and service providers but opens up a plethora of co-creation opportunities.

INTERESTED? If you are interested in taking part in such co-creation exercises, please write to Sibani Sarma at sibani.sarma@idream.in

Images from Unsplash.com | Research partner: iDream | www.idream.in

"The era of the Single Savior is over. What is needed now is joint action, combined effort, collective co-creation."

Neal Donald Walsch

DISCLAIMER: *All information made available do not represent the researchers' professional judgment in any manner, but are information obtained from survey respondents and interviewees. Since the contents of the report are conditioned by factors outside the control of the researchers, Freespace, IFMA or iDream cannot accept liability for such responses and the consequent conclusions drawn from it by readers.*

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The science behind workplace optimisation

Freespace is a workplace technology solution that helps organisations achieve significant cost savings and improve space efficiency, real estate performance, employee wellbeing and productivity.

Portfolio Optimisation

Real estate is the second largest cost and there is an opportunity to unlock significant savings in underused space. Detailed visibility of occupancy levels across a global, regional or national portfolio enables real estate teams to continuously align the size of their portfolio with the demand of the business.

Workplace Enhancement

Workplace environments play an important role in defining the employee experience. This in turn aides recruitment, productivity and retention. Occupancy data provides deep insights into how employees interact with the workplace which can be used to improve design, operation and the overall employee experience.

Employee Engagement

Great companies aspire to create a common workplace brand to shape their corporate culture. Client branded digital signage combines the value of real-time space availability with intuitive touch navigation to deliver a superior workplace experience that increases employee engagement, productivity and satisfaction.

Smart Infrastructure

Automating building infrastructure and resource allocation can assist organisations in achieving their carbon strategy. Integration of occupancy, environmental and air-quality data into building controls and booking tools enables the responsive management that reduces underutilised resources and unnecessary energy usage.

Sensors	Analytics	Signage	Integrations	Support
Ceiling, wall or under desk mounted to monitor occupancy, environment and air quality.	Easy to use dashboards and reports with real-time or detailed historical analysis.	Real-time visibility and navigation to available spaces, meeting rooms and resources.	Simple integration with systems to deliver occupancy-led automation of resources.	24/7 support from installation through to ongoing day-to-day business operations.