



# RETURN TO OFFICE SURVEY

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**FEBRUARY 2022**

***HYDERABAD SOFTWARE  
ENTERPRISES ASSOCIATION***

***WWW.HYSEA.IN***

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Hyderabad Software Enterprises Association  
1st Floor, TSIC IALA Building, Beside Madhapur Fire Station, Phase 2, HITEC City,  
Hyderabad, Telangana 500081

Phone: +91 9030032711

Mobile: +91 92465 00952

Email: [info@hysea.in](mailto:info@hysea.in) ; <https://www.hysea.in>

## SURVEY CONTEXT

We have seen three waves of Covid-19 and nearly 80% of the population getting fully vaccinated since the onset of the pandemic. With Wave 3 subsiding, there is intense speculation on whether IT industry is ready to bring its employees back to offices. Specific to Hyderabad, it is a known fact that nearly 40% of the work force is outside Hyderabad and offices continue to function at an average of only 10% employees working from offices and rest from homes in Hyderabad or elsewhere. Schools have reopened but attendance continues to be thin. Demand for the industry continues to be high and attrition remains higher than normal.

In this backdrop, HYSEA felt it is the right time to get the industry opinion in a structured manner regarding the Return to Office plans. These plans and policies could be getting driven locally, nationally or globally or could be based on business imperatives. The best way to find out is to let the leaders speak, hence this survey. This is the voice of the industry in Hyderabad.

## EXECUTIVE SUMMARY

- A total of 68 companies participated in the survey with a healthy mix of SME, large and very large companies across IT services, products, Indian and MNC companies. This sample size represents nearly 30% of the IT/ITeS industry in Hyderabad / Telangana. Hence the survey results are statistically robust and representative of the industry view.
- In a positive indicator for return to office, more than 56% of offices are fully functional and employees allowed to work from office. 28% of offices are open in a restricted way for critical resources.
- In another positive indicator for return to office, 65% of companies want 100% of employees back in office but in a hybrid model. 15% of the companies want all 100% of the employees back to work on all working days.
- Hybrid work model is here to stay based on majority of the responses. If schools operate in full physical mode, then there is a possibility of more employees returning to Hyderabad and offices.
- Global/National Policy of the company drives the future work models for 54% of the companies and for the other 46%, the decision is driven by local leadership and conditions.
- Majority of the companies have either already written to employees or planning to write soon asking them to return to office
- 45% of the respondents felt productivity issue was the main driver for return to office policy. It was followed by Client and business imperatives (22%). A significant 33% of companies felt employee morale, lack of collaboration, bonding and L&D reasons as drivers to return to office.
- Much hyped '**moonlighting**' or **working on multiple jobs simultaneously** was not observed as a major issue by an overwhelming majority of participating companies.

**DETAILED SURVEY FINDINGS**

**1. Company Size in terms of headcount in Hyderabad.**

The respondents to the survey were a good mix of Very Large, Large and MSME companies.

Company Size	% of respondents
V. Large	7%
Large	31%
Medium	13%
Small	28%
Micro	21%

Table 1

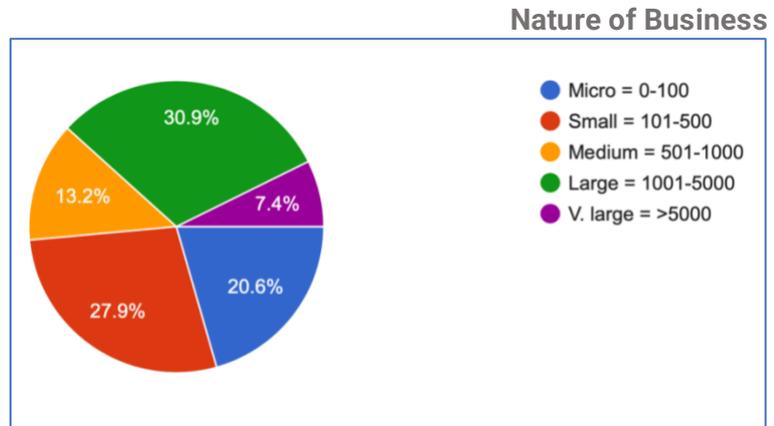


Figure 1

**2. Nature of Business**

Majority of the companies(38%) who participated in the survey were from IT Services business followed by 25% of Product companies. 22% were from integrated IT and ITeS businesses.

Nature of Business	% of Respondents
IT Services Only	38%
IT Products Only	25%
IT & ITeS integrated	22%
ITeS Only	6%
Engineering Services Only	4%
Staffing or HR Services Only	2%
Others	3%

Table 2

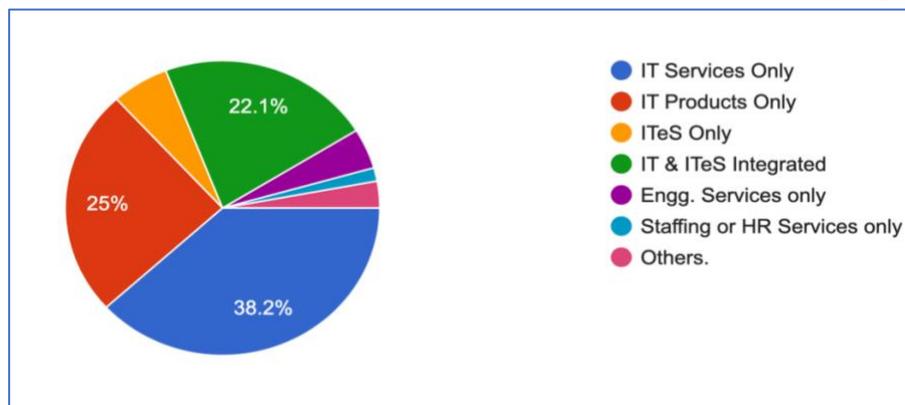


Figure 2

### 3. Headquarters of participating companies

An almost equal number of the India non-Hyd headquartered companies and Non-India HQ with GCC in Hyderabad companies responded to the survey.

Headquarters	% of Respondents
Hyderabad HQ	8%
India non-Hyd Headquartered	43%
Non-India HQ with GCC in Hyd	49%

Table 3

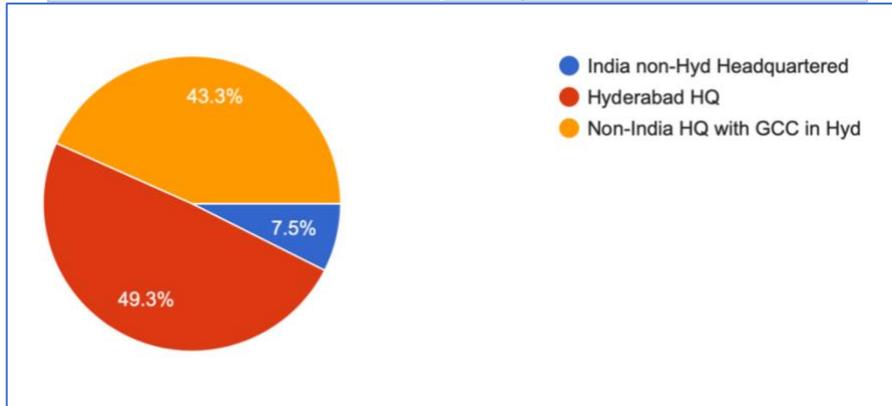


Figure 3

### 4. Status of Offices Functioning / Closed

In a positive indicator for return to office, more than 56% of offices are fully functional and employees allowed to work from office. 28% of offices are open in a restricted way for critical resources.

Table 4

Current Work from Office %	% of Respondents
Offices are fully functional & employees allowed	56%
Open in a restricted way for critical resources only	28%
Not Open	16%

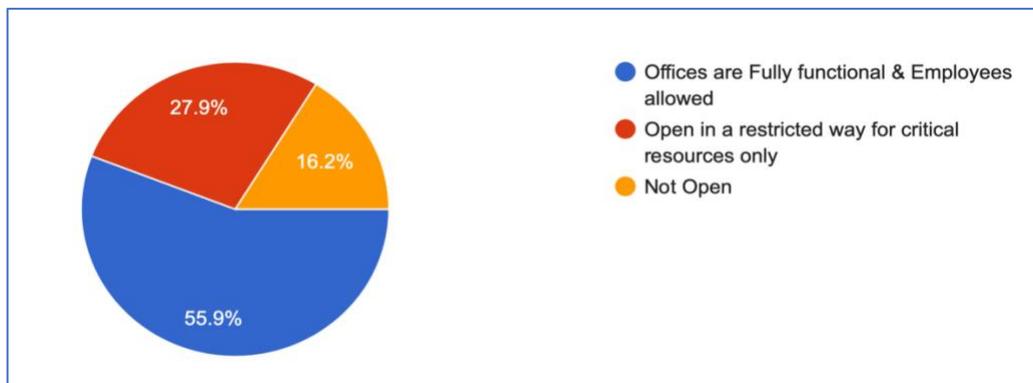


Figure 4

**5. Policy companies are planning to adopt in 2022 when it comes to work model.**

In another positive indicator for return to office, a majority of 65% of companies want 100% of employees back but in a hybrid model. 15% of the companies want all 100% of the employees back to work on all working days.

Future work Models	% of Respondents
We would like 100% of employees to come back to office on all working days	15%
We want 100% employees back but in a hybrid model	65%
Only essential employees or other role based hybrid model will be followed	21%

Table 5

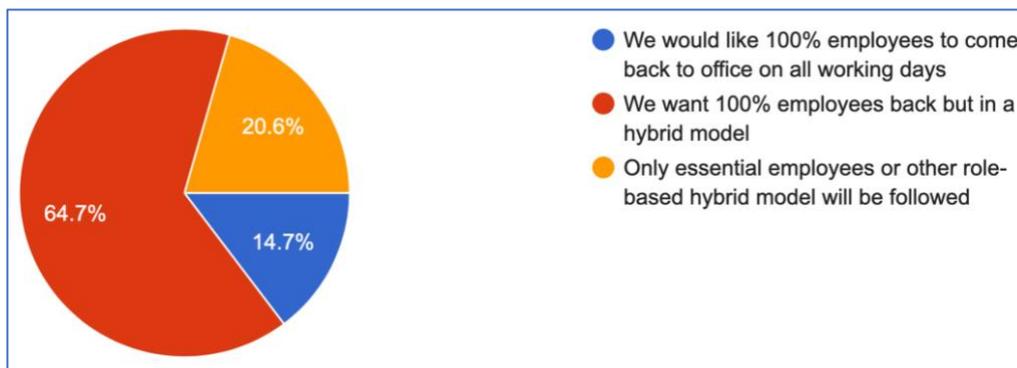


Figure 5

**6. Drivers for the above policy**

A considerable 54% of companies stated that Global/National Policy of the company will drive the future work models and for 46% companies, the decision is driven by local leadership and conditions.

### 7. Company communication with employees asking them to return to office in the next month or two.

Majority of the companies have either already written to employees or planning to write soon asking them to return to office. 27% of the responding companies have no immediate plans to ask their employees to return to work from office.

Communication to Employees	% of Respondents
Yes, already written	31%
Planning to write soon	43%
No plan so far for such a communication	27%

Table 6

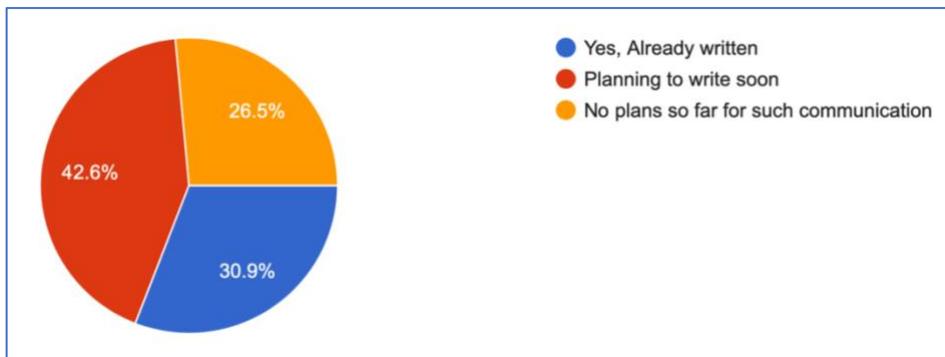


Figure 6

### 8. In case of an RTO Policy either fully or in hybrid mode, the main driver for such a policy.

Productivity issue was cited as the main driver for return to office policy. It was followed by Client and business imperatives. A significant 17% of companies felt employee morale issues is driving their return to office policy.

Return to office drivers	% of Respondents
Client and business imperatives	22%
Productivity issues	45%
Employee Morale	17%
Other	16%

Table 7

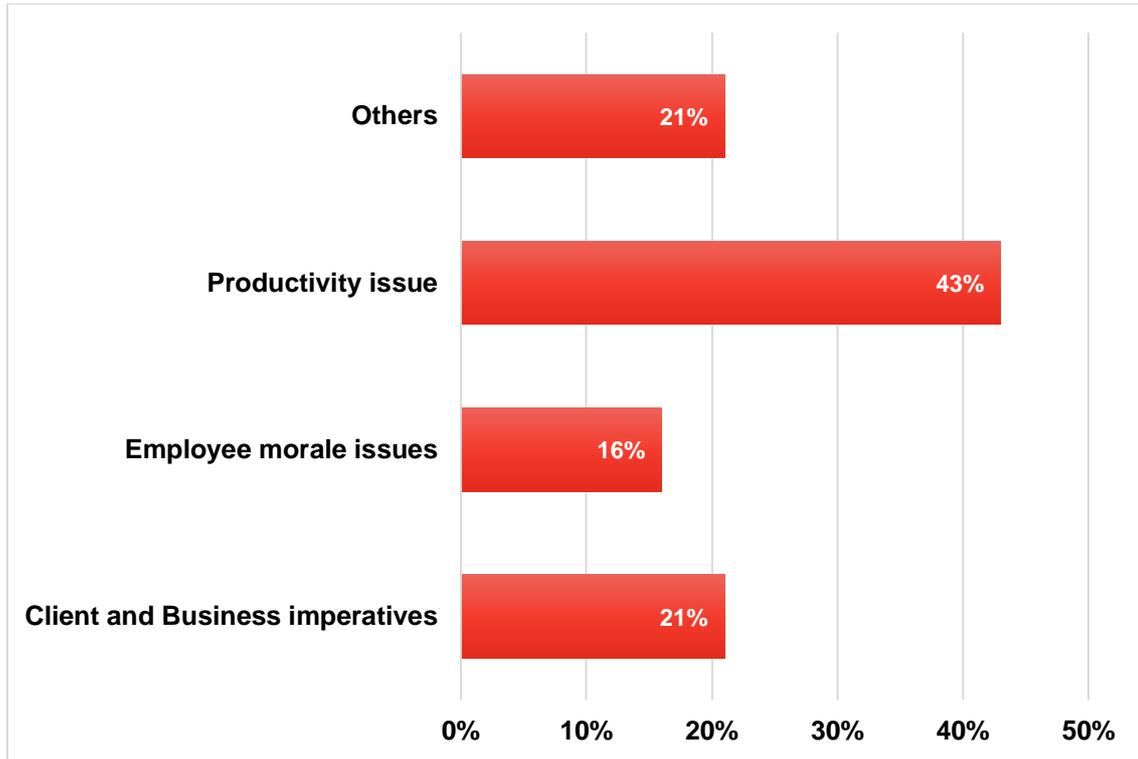


Figure 7

**Other drivers:**

Teamwork, Collaboration, bonding, L&D, Culture, and Innovation seem to be the other major drivers for RTO.

**9. Companies direct experience with the phenomenon called “Moonlighting” or employees taking advantage of WFH and working on multiple jobs simultaneously.**

A whopping 78% of the participating companies said they have not observed moonlighting by employees or seen it very rarely. Only 9% felt it is widely prevalent.

Experience on the topic of ‘moonlighting’	% of Respondents
We have not observed this phenomenon	41%
We have noticed this but in very rare cases	37%
This is widely prevalent based on data we have gathered	9%
No comment	13%

Table 8

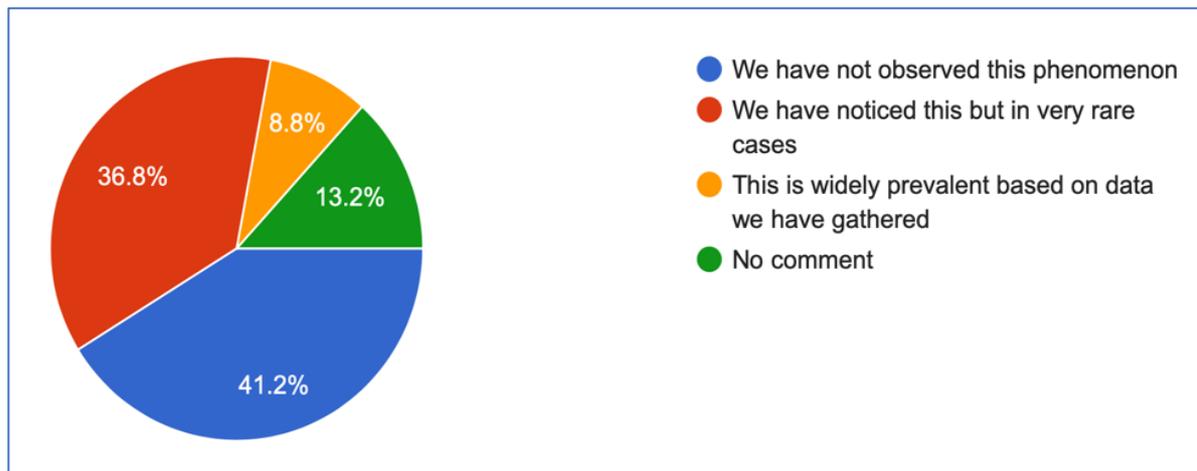


Figure 8

#### 10. Other comments / observations regarding the future work model. Role HYSEA can play to make the chosen model successful.

- Many employees are working remote outside of Hyderabad and we cannot force them to return unless schools open up in completely offline mode. As long as schools work in Hybrid mode, employees would need some flexibility. It is not yet clear when Govt will advise private schools to open completely.
- Hostels opening up, Builders offering flex spaces in SEZ, Cafeteria enhanced in SEZ, SOPS from state government for creating jobs in Tier 2 and 3 cities within the state
- HYSEA can share the different models being planned across the industry in Hyderabad for general awareness
- Hybrid is the future.
- We are giving employees the choice to decide if he/she wants to be fully remote or work in a flexible model (some days at work and some days from home)
- HYSEA can always suggest some of the best model in the current scenarios, so that as a company, we can look forward to implementing them.
- Create a generic set of guidelines that companies can use as a baseline and customize.
- We prefer a majority % to work from office and minor % to work from home. HYSEA should encourage and promote such models among the fraternity. Just to keep employees happy, companies seem to resort to 100% WFH initially but it must be understood that people are social beings and working remote in isolation sounds nice but there are various negative impacts observed both on personal side and professional front.
- For our young inexperienced employees, it is imperative that managers get to work and train them in person. We do not have USA situation where average worker is 40 years old and has repeated the same job for 15 years.

**Disclaimer**

This report is a subset and abridged version of the recent survey HYSEA has conducted. It is based on a robust sample size but is prone to sampling errors like any other survey or report of this nature. The views expressed are by industry leaders and not HYSEA's.

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1st Floor, TSIIIC IALA Building, Beside Madhapur Fire Station, Phase 2, HITEC City,  
Hyderabad, Telangana 500081  
Phone: +91 9030032711  
Mobile: +91 92465 00952  
Email: [info@hysea.in](mailto:info@hysea.in) ; <https://www.hysea.in>