255

ORF OCCASIONAL PAPER

JUNE 2020

New Space for the Future of Work: Co-working in India

Sabrina Korreck

ORF OBSERVER RESEARCH FOUNDATION

New Space for the Future of Work: Co-working in India

Sabrina Korreck

ORF OBSERVER RESEARCH FOUNDATION

ABOUT THE AUTHOR

Dr. Sabrina Korreck is a Senior Fellow at Observer Research Foundation. Her research focuses on the future of work and developments in startup ecosystems, particularly in South Asia and Europe. She previously held research positions at the Chair of Management and Digital Markets at University of Hamburg as well as the Hertie School of Governance, and worked as a business analyst in the Berlin startup scene.

ISBN: 978-93-90159-37-6

New Space for the Future of Work: Co-working in India

ABSTRACT

The nature of work is changing, leading to the loss of some jobs and the creation of others that require radically changed skills. In India, as the requirements of this evolving labour market change, co-working spaces fulfil many of the new needs. The aim of this paper is twofold: to describe the development of the co-working industry in India, its driving factors, as well as the architecture, design and social aspects of the work environment; and explore the demographics of co-workers, the kind of jobs they do, their work conditions, interactions, career aspirations, and satisfaction levels. The study builds on a survey of 462 people working at co-working spaces operated by WeWork, and was supplemented by interviews with staff, as well as a literature review.

Attribution: Sabrina Korreck, "New Space for the Future of Work: Co-working in India," *ORF Occasional Paper No. 255*, June 2020, Observer Research Foundation.

1. INTRODUCTION

The nature of work, in India and in other parts of the world, is changing due to emerging technologies associated with the Fourth Industrial Revolution (4IR) such as artificial intelligence, robotics, internet of things, and cloud computing. As a consequence, major socio-economic transformations will characterise the future of work: Many jobs are being lost, while other jobs, some of which have not existed before, are being created. In India, it is predicted that by the year 2022, only 54 percent of jobs will remain unchanged, while nine percent of the workforce would be deployed in new jobs that do not even exist today.[1] A significant number of jobs require new and radically changed skills and it is estimated that 37 percent jobs in India fall into this category.

Moreover, the future of work often requires different ways of working. In particular, flexible and agile ways of working will become more common as they allow companies to react faster to changing conditions in the business environment. Along with this trend, more work will be project-based and involve external staff, which in turn increases the importance of networking and social skills. Work life will also be influenced by the pressure for cost efficiency and by the expectations of the "millennial generation",[a] who are seen as the driving force behind the growing digital economy.

Purposefully designed offices can facilitate such new ways of working and co-working spaces[b] fulfill many of these changing

a The term millennials refers to the population cohort, which reached their adulthood in the 21st century.

b The term refers to work environments, in which office space and facilities are shared by workers from different backgrounds, including freelancers and employees from companies of different sizes.

requirements of the labour market. As the concept has become increasingly popular over the past few years, the number of spaces has increased fast, and today India is considered the second largest market in the co-working industry after China.[2]

This paper describes the development of the co-working industry in India, its driving factors, as well as the architecture, design and social aspects of the work environment. It explores the demographic profile of co-workers, what kind of jobs they do and the work conditions thereof, their patterns of interactions with other co-workers and how they benefit from them, their career aspirations, and satisfaction levels. The study builds on a survey of 462 people working at co-working spaces operated by WeWork in Gurgaon, Haryana. The study was supplemented by interviews with staff from the co-working spaces, and a review of literature.

Research Approach and Data Collection

This study aims to give a comprehensive overview of the phenomenon of co-working in the context of the future of work in India. For this purpose, a quantitative survey of co-workers was conducted, which was supplemented by a literature review and some initial interviews. The study was conducted in cooperation with WeWork,[c] which provided access to its premises and co-workers for data collection.

In the first step, available literature on the topic was reviewed, and 12 employees from the participating co-working spaces were

c The US-based co-working space operator started its business in 2010, opened its first space in India in 2017, and currently operates 28 co-working spaces across the country (i.e. in the National Capital Region, Bangalore, Mumbai, Pune, Hyderabad, Chennai, as of January 2020).

d The interviews took place between 5th and 26th November 2019.

interviewed.[d] Interview partners included the general manager as well as staff from different business units such as community management, sales, real estate, operations, branding and marketing. In the second phase, the information gathered through the literature review and interviews was used to develop a standardised questionnaire on issues related to demographics, jobs, work conditions, interactions, career aspirations, and overall satisfaction. All respondents received the same questionnaire.[e] (See Annex 1 for more details on the questionnaire.)

The researcher, accompanied by a community manager, approached co-workers in private offices and open desk areas. After providing a brief overview of the purpose of the study, the questionnaires were distributed, and co-workers were given time to fill them out. Around 800 questionnaires were distributed to co-workers, out of which 462 were filled in. Data from the questionnaires was anonymised and transferred into a spreadsheet, and analysed subsequently.

Most co-workers, who were present at their desks were invited to participate in the survey. Therefore, the survey can be assumed to be representative of the overall population of co-workers in WeWork co-working spaces in Gurgaon. However, regarding the generalisability of results, it has to be taken into account that this co-working space operator positions itself as a premium market product. Other Indian co-working providers might address different target groups, and their occupancy varies as well.

e The survey was conducted in five WeWork co-working spaces in Gurgaon between 2 December 2019 and 6 January 2020. WeWork Gurgaon runs two further verticals, i.e. a midmarket product line (which is currently being piloted) and WeWork Labs, an inhouse incubator. The survey was conducted only in the "normal" spaces.

2. BACKGROUND: CO-WORKING AS A NEW PHENOMENON IN INDIA

Co-working today has to be understood in the context of its development over time, and current factors that drive its demand. This section also explains how co-working spaces purposefully choose architecture and design and curate their social environments.

2.1. Origins of Co-working and Recent Developments

The co-working phenomenon started in the West in the late 1990s and has its origins among freelancers, entrepreneurs, and the tech industry.[3] Initially, co-working was driven by the idea that creative workers would join forces to work together yet autonomously, while everyone would contribute to maintaining the space. Thereby, co-working spaces promised a "third way" of working: halfway between standard work life in a traditional workspace, and work life as a freelancer which offered greater autonomy but where workers are based at home in isolation.[4] The movement's vision of "new work" was guided by the ideals of freedom, self-reliance, as well as community participation.

Over time, the numbers and diversity of spaces increased and co-working became an industry catering to a broader range of people and organisations. In particular, many established large and medium-size businesses followed the trend and ventured into co-working. From the perspective of the co-working space providers, those companies are more reliable tenants as compared to freelancers and startups, whose economic situation and potential for long-term success is often less predictable.

In India, increasing numbers of co-working spaces have been established over the last five years. They are an attractive choice for landlords and real estate agents that look for other tenants as the traditional ones—such as retailers—have closed down.[5] Large investments have poured in and enabled the propagation and scaling up of the concept.[6] Today there are an estimated 400 shared workspaces in the country, which are run by around 200 co-working brands.[7,f] The highest number of co-working spaces can be found in Delhi NCR, Mumbai, Bangalore, Hyderabad, Chennai and Pune.[8] It is estimated that by 2020, the co-working share of office leasing will increase to around 18 percent of the total workspace in India.[9] The potential market size for co-working across India is estimated to be 15.5 million, which is composed of 1.54 million freelancers, 0.1 million startups, 1.54 million SMEs, and 10.3 million enterprises.[10]

Opinions are mixed on the future development of the co-working industry in India. According to an optimistic prognosis, the supply of flexible office space will continue to grow massively, due to ambitions of existing global and national operators and entry of new players backed by strong funding.[11] A more cautious assessment, however, assumes that the growth has already peaked and that the market is now saturated.[12] According to the latter perspective, the next few years will see a consolidation, with market exits and bigger players acquiring smaller ones or entering into joint ventures.[13] Despite these different opinions, it is clear that the landscape of co-working spaces will continue to evolve. One visible trend is that co-working space providers are expanding geographically and venturing into smaller, yet fast-evolving tier-2 cities such as Jaipur, Goa, Chandigarh and Lucknow.[14] Co-working providers are also increasingly diversifying their offers by catering to particular sectors, and customising their

f Prominent players in the Indian market include WeWork, Innov8, Cowrks, Awfis, 91 springboard, and myHQ.

locations, design and fit-out to certain clients.[15]

Early this year, the COVID-19 pandemic made the long-term prospects of the co-working industry uncertain. When the first cases of infection occurred in India in January, co-working space operators introduced preventive measures to protect the health of their co-workers and staff. For instance, large gatherings in common areas were suspended, spaces were regularly disinfected and sanitisers were placed across the building; personnel were also provided with masks, screened for temperature, and requested to stay home if they were displaying symptoms.[16] As more co-workers moved into their home offices, co-working spaces experienced an almost 50-percent decrease in footfalls, and signed up fewer new clients.[17]

The government would eventually impose a nationwide lockdown on 25 March, and most co-working spaces closed their premises. As a consequence of the resulting economic fallout, some tenants have not been able to pay their rents or have been forced to cancel their contracts. This poses a challenge to the co-working spaces, which often have long-term lease liabilities with their landlords. After the lifting of the lockdown, the key question is whether the co-working industry will recover soon or will experience long-term damage.

At the same time, all organisations and employees will need to live with the virus for longer, until a vaccine or medication is available. This implies that many co-workers will continue to work from home, and for those who return to their offices, provisions have to be in place to ensure social distancing. This could be difficult, as it requires increasing distance between desks and restricting socialising events, which are a core element of co-working. On the other hand, some key factors, which will be described in the next section, will continue to drive the demand for co-working spaces. In particular, it is expected that in the post-lockdown phase, companies will lay more emphasis on cost optimisation and prefer flexible workspaces.[18]

2.2. Factors that Drive the Demand for Co-working

The rise of co-working spaces is driven by various factors, whereas the motivations and benefits of co-working partly differ across target groups. Note that co-workers do not always choose to work from a specific co-working space, but are often directed by superiors (e.g. in HR or administration units) who decide on behalf of their teams.

First, in a fast-paced economy, being able to act in a flexible and agile manner constitutes a competitive advantage for businesses. Co-working spaces give their tenants such flexibility by offering a turn-key office solution, which allows co-workers to move in and start working after minimal set-up time. The "office-as-a-service" business model promises further ease of business, because tenants do not individually have to manage real estate. Instead, the co-working space provider takes care of the operations such as managing the front desk, electricity and IT support, housekeeping, security, and mail delivery.

Furthermore, Indian businesses seek to tap into the more flexible gig economy workforce, which is on the rise and represents a core shift in the future of work. Thereby, more businesses hire independent contractors to perform jobs, often on call or on a short-term basis, and pay them when the task is done. Many corporations are open to the idea of having temporary staff working at distributed centres (co-working facilities).[19] Co-working spaces cater to this shift, as they allow office space to be rented even for a short period of time—for instance for projects that need only a few weeks or months. Office space can also be scaled up and down, and thereby adjusted to changing team size to accommodate a flexible workforce that expands and contracts with the work load, without the longer-term commitments that come with employing permanent staff.[20]

The future of work is further characterised by increasing flexibility in terms of working hours and location, i.e. many tasks are no longer tied to one particular place and can be performed anytime. Therefore, remote workers, and workers who frequently travel, are becoming more common. Co-working spaces cater to the needs of this mobile work force by providing a "touchdown space" for them to work and meet. The bigger brands operate a network of spaces and allow their co-workers to access these spaces spread across the country or even globally.

Second, co-working spaces bring together people from different industries, with diverse personalities and skills, and it is believed that such spatial proximity facilitates conditions for networking and building relationships. The possible benefits of interactions between co-workers are another factor that drives the demand for co-working spaces.

On the one hand, from a freelancer perspective, isolation can be a problem. Rather than working from home, they may prefer to work in a co-working space, which provides a more sociable environment. Additionally, as independent professionals, they rely on networking to acquire clients and procure new orders. Co-working spaces can provide them a platform to present themselves and their services and to access social capital, which can lead to new job opportunities and higher income. On the other hand, corporations turn to co-working spaces, when they work on ring-fenced or test-bed projects, often with outside collaborators.[21] In particular, more creative teams from business units such as development, research, marketing, design are moved into co-working spaces.[22] The geographical distance to the head office allows employees to be detached from corporate culture and bureaucracy, and the exposure to different people is assumed to help spark creativity and new ideas. Moreover, co-working spaces provide an environment where companies can initiate contacts with independent professionals, and which is convenient for accommodating them for joint projects.

Third is economics. It is estimated that in India's top cities, a co-working space is likely to lead to cost savings in the range of 20 to 25 percent.[23] One reason is the low set-up costs, as tenants are neither required to make high deposit payments, nor huge investments in furniture, office equipment or other assets, which depreciate over time. Another cost-saving factor is the "office-as-a-service" business model, which means that tenants pay a monthly rent per desk and all costs for managing the office space are already included. The co-working space provider manages the operations for all tenants, which is more cost-effective than if tenants overlook the operations individually. Furthermore, as office space can be scaled up or down, tenants pay only for the number of desks they really need, and they can book additional rooms for e.g. conferences or meetings on demand. In addition, Indian businesses plan to hire more freelancers and contract workers, mainly to reduce costs.[24]

Fourth is the changing demographics. India has a very young population and so-called millennials form about 50 percent of the workforce by 2020, and, by 2025, this number is estimated to increase to 75 percent.[25] Indian millennials are the driving force behind the growing digital economy—not only as employees, but also as Internet users (61 percent) and online shoppers (78 percent).[26] Because of their digital savviness, companies are keen to hire them and co-working spaces can be used as a recruitment tool. One recent development is that traditional industries (like banking, insurance, and manufacturing) are switching to co-working options, which allows them to portray themselves as “new-age” companies to attract young talent.[27] In many ways, the design and promoted culture of co-working spaces appeals to the zeitgeist and to what millennials consider “cool”. In particular, shared spaces are jazzed up to attract millennials and match up with the startup culture.[28] Indeed, while Indians have previously not been excited about freelancing, the startup culture has changed people’s attitudes towards the gig economy and more people are now willing to engage in a risky venture instead of choosing a safe job.[29] In addition, co-working spaces see themselves as hospitality companies and by making sure that co-workers have a positive experience, they can possibly help companies to increase satisfaction, productivity and retention rates of their employees.

Furthermore, co-working spaces cater to another demographic change in India—rapid urbanisation. It is expected that almost 40 percent of the population will be living in cities by 2025.[30] By then, around 42 percent of the population in India will work in urban centres, which will lead to an increase in demand for office space.[31] As cities become more congested, companies may opt to open satellite offices in co-working spaces to reduce commuting time of their employees and to recruit talent from a broader radius. Co-working spaces usually choose locations which offer easy access to public transport.

2.3. Architecture and Design of Co-working Spaces

Modern co-working spaces look different from traditional offices and their architecture and design is purposefully chosen to cater to the changing nature of work and help workers fulfil new job roles. Typically, co-working spaces have the following elements in common:

First, the design and architecture reflects the need for flexibility, as office arrangements cater to different work styles and preferences of co-workers. They can choose between different seating options. For instance, co-workers who need a quiet place to focus might prefer a desk in a private office, while co-workers who want to socialise or need to discuss their work with others choose a seat in a common area with large, shared desks. Offices can accommodate different team sizes, and adjustments can be made by adding desks or renting more rooms. Furthermore, co-working spaces provide rooms for multiple purposes, such as conferences, training rooms, or soundproof booths for phone calls.

Second, co-working spaces are designed to foster an interactive environment. The need for transparency is expressed, for instance, in offices having glass walls. The requirement for openness is reflected in open plan layouts that remove physical barriers that prevent communication (exceptions are private offices, to which access is restricted). Moreover, co-working spaces typically have large common areas with kitchens, lunch tables, food or coffee bars, which provide touch points where co-workers can meet and interact. Many co-working spaces also have game zones.

Third, co-working spaces answer to the professional and personal needs of co-workers to make them feel comfortable in the work environment and enable them to work productively. The spaces have colourful, contemporary and aesthetically pleasing interiors, they are given more natural light, and lounge areas are equipped with designer sofas or beanbags. Walls are adorned with paintings and posters of famous entrepreneurs or motivational quotes that aim to radiate startup spirit and create an "inspiring" atmosphere. Some co-working spaces also have wellness rooms, gyms or outside areas like a rooftop terrace.

Fourth, as technology is the primary driver of the future of work, it is no surprise that it also plays a prominent role in co-working spaces. The latest technologies are deployed to manage operations and to support co-workers in collaborating with others, be it inside the co-working space or across spatial boundaries. For instance, fast internet connections are assured, as well as equipment for video conferencing, monitors and projectors for presentation, and constant IT support services. Technology is further used for security purposes to facilitate access-control and visitor management. Moreover, some larger co-working space brands have developed their own mobile apps. They are used by co-workers, for instance, to book rooms, view invoices and submit support requests, and by co-working providers to announce events and communicate relevant information.

2.4. Co-working Spaces as Social Environments

Beyond offering managed office space, co-working space providers purposefully market their "communities" of co-workers. Indeed, the social environment is a major reason that people are drawn to co-working. Researchers in the US found that people in co-working spaces thrive more than their counterparts who are based in traditional offices,[32] because co-workers find a good balance between structure and autonomy. Given that co-working spaces host different companies, there is also less direct competition or internal politics. However, the interpretation of co-working spaces as 'communitarian' places is arguable and it may be reasonable to assume that competition is not completely suppressed.[33]

While architecture and design are intended to promote serendipitous interaction, co-working space operators put further effort in creating a vibrant community. For this reason, they employ dedicated community managers, who serve as persons of contact for co-workers and are tasked with relationship management. As they get to know co-workers, they are able to fulfil the role of intermediaries who can make introductions and tie people together. For community management jobs, co-working spaces recruit people who embody the collaborative culture they seek to promote. Such an informal and casual atmosphere lowers the barrier for co-workers to get in touch with each other.

Furthermore, to help co-workers get to know each other, co-working spaces usually organise a variety of events, such as breakfast get-togethers, fitness and wellness classes, professional workshops, after-work parties and game sessions. Some co-working space operators also provide a mobile app which allows co-workers to access their broader networks. Co-workers can create profiles to present themselves or their company, and reach out to their co-workers.

3. PRESENTATION OF SURVEY FINDINGS

The survey, in which 462 respondents participated, was structured around six sets of questions. This section describes the results in view of the demographics of co-workers (3.1), the kind of jobs they do

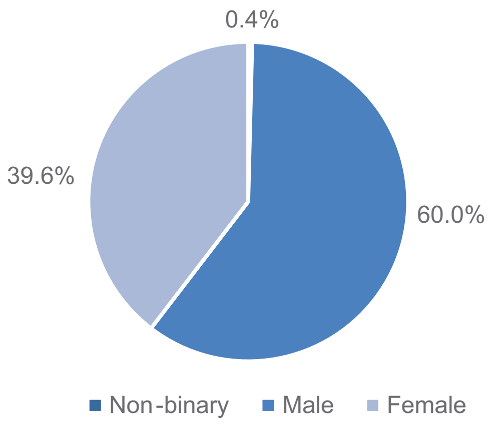
(3.2), their work conditions (3.3), interactions with others (3.4), career aspirations (3.5), and degree of satisfaction (3.6).

3.1. Demographics

The first set of questions explored the demographic characteristics of the co-workers: Who the co-workers are in terms of demographics, i.e. gender, age, marital status, place of birth and residence, education, and work experience.

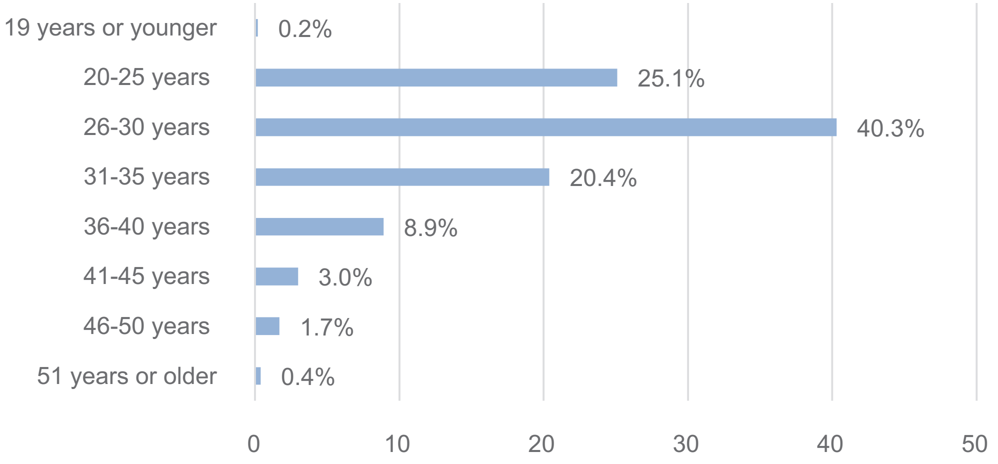
Gender. A majority (60 percent) of the co-workers are men, 39.6 percent are women, and 0.4 percent identified themselves as non-binary.

Figure 1.1: Gender



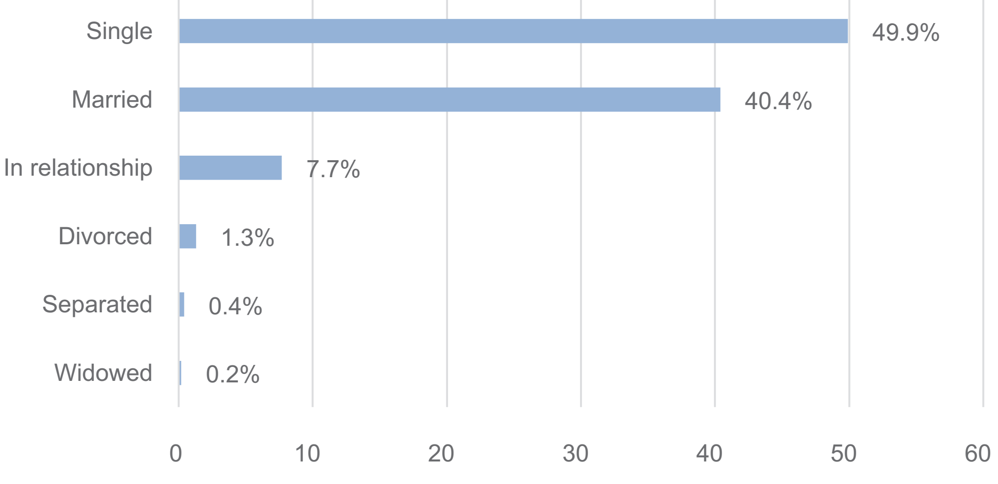
Age. Co-workers represent a young population. A quarter (25.1 percent) of the surveyed co-workers are between 20 and 25 years, and 40.3 percent are between 26 and 30 years; 20.4 percent are 31 to 35, and 8.9 percent are between 36 and 40. A small 5.2 percent of co-workers are 41 years or older.

Figure 1.2: Age



Marital status. Every second co-worker (49.9 percent) is single, 40.4 percent are married, and 7.7 percent said they were in a relationship. An aggregated percentage of 1.9 of co-workers are either divorced, separated or widowed.

Figure 1.3: Marital status



Place of birth and residence, labor mobility. Around half of the co-workers (48.7 percent) were born in Tier 1 metro cities; 38.9 percent were born in Tier 2 suburban cities; and 11.4 percent in Tier 3 rural areas. Very few of the respondents (1.1 percent) were born abroad.

At present, a large majority of 93.7 percent of co-workers live in Tier 1 metro cities. Only an aggregated percentage of 6.4 percent of co-workers live in either Tier 2 cities (5.7 percent) or Tier 3 rural areas (0.7 percent), and no one is living abroad. Comparing this data to the data on the place of birth shows that many co-workers have moved from suburban or rural places to larger cities.

A further question asked whether co-workers have moved, since they accepted their current job. It turned out that an aggregate 34.9 percent of co-workers have moved, either from a different city (20.7 percent) or within the same city (14.2 percent). In contrast, 61.4 percent have not moved their place of residence since acceptance of their current job, and 3.7 percent have moved for non-work-related reasons.

Figure 1.4: Place of birth

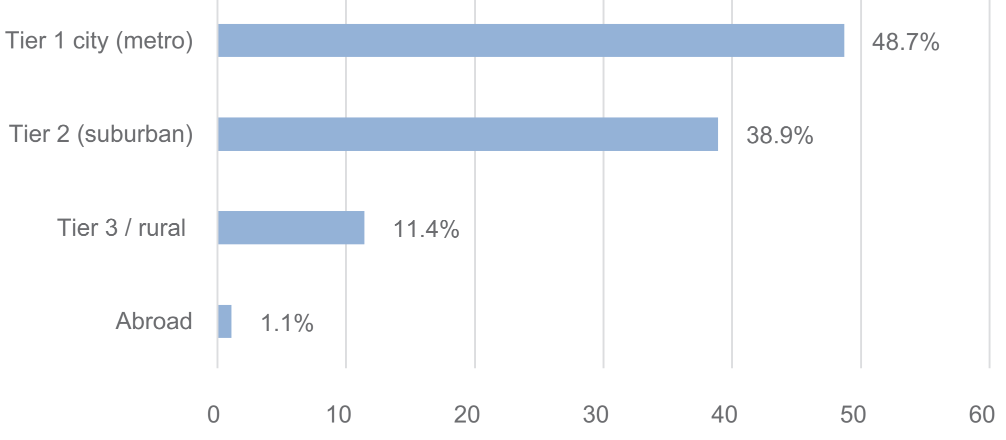


Figure 1.5: Current place of residence

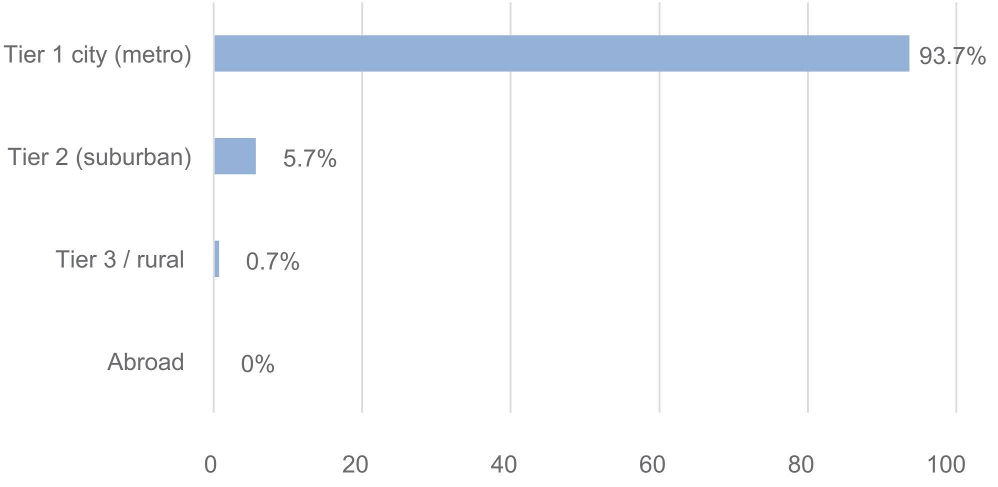
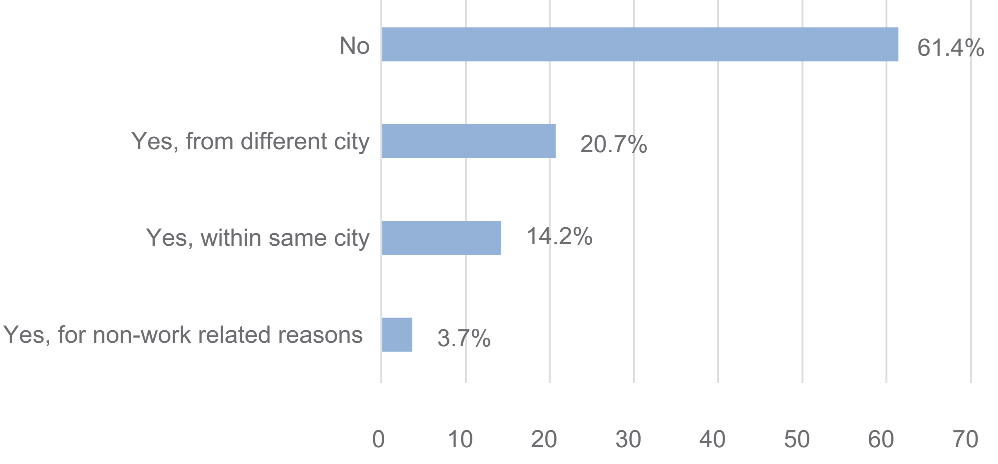
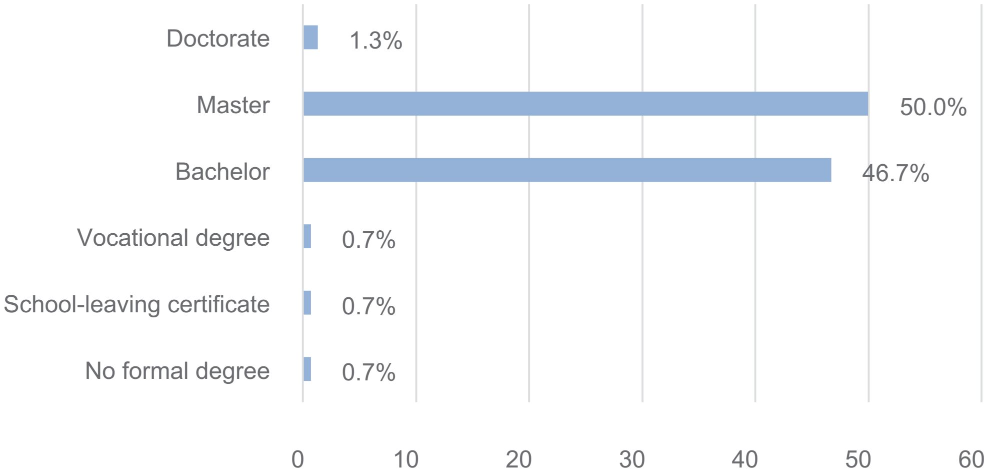


Figure 1.6: Have moved residence since current job



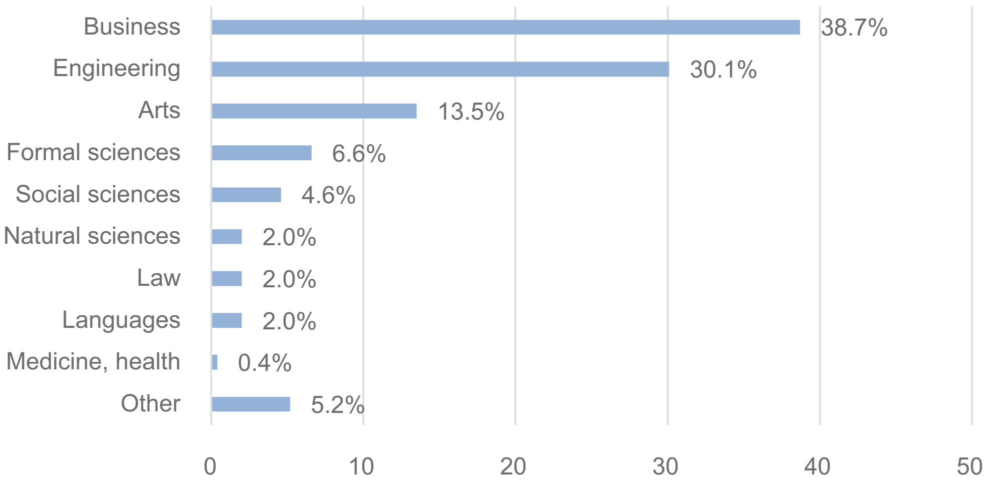
Educational background. A vast majority (98.0 percent) of the co-workers are academically qualified: 46.6 percent have a Bachelor's degree, 50.0 percent a Master's degree, and 1.3 percent carry a doctorate. Only 2.1 percent have a vocational degree, a school-leaving certificate, or no formal degree.

Figure 1.7: Highest level of education



Field of study. Around two thirds of the surveyed co-workers have either a business background (38.7 percent) or engineering (30.1 percent). Others studied arts (13.5 percent), formal sciences such as computer science or mathematics (6.6 percent), or social sciences (4.6 percent). Fewer co-workers have focused their studies on natural sciences (2.0 percent), law (2.0 percent), languages (2.0 percent) or medicine and health (0.4 percent). A small 5.2 percent had their main field of study in other areas not specified in the questionnaire.

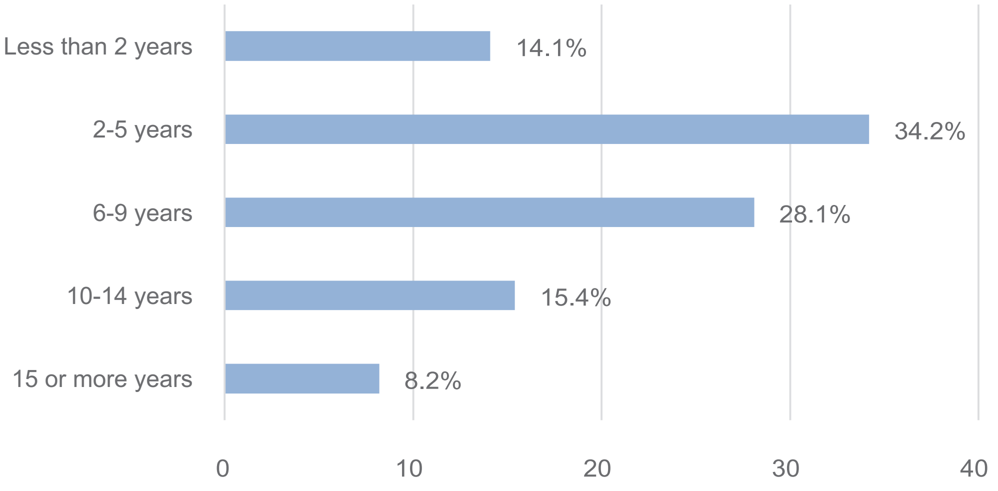
Figure 1.8: Main field of study



(Note: Respondents could select up to two answer options)

Previous work experience. Most co-workers are in the early and middle stages of their careers, with an aggregated 76.4 percent having completed nine years of previous paid work experience or less. The largest group (34.2 percent) are those, who have between two and five years of work experience; 14.1 percent of co-workers are in the beginning of their career and in their first two years of work life; 28.1 percent have between six and nine years of work experience; 15.4 percent between ten and 14 years; and 8.2 percent have 15 years of work experience or more.

Figure 1.9: Years of paid work experience

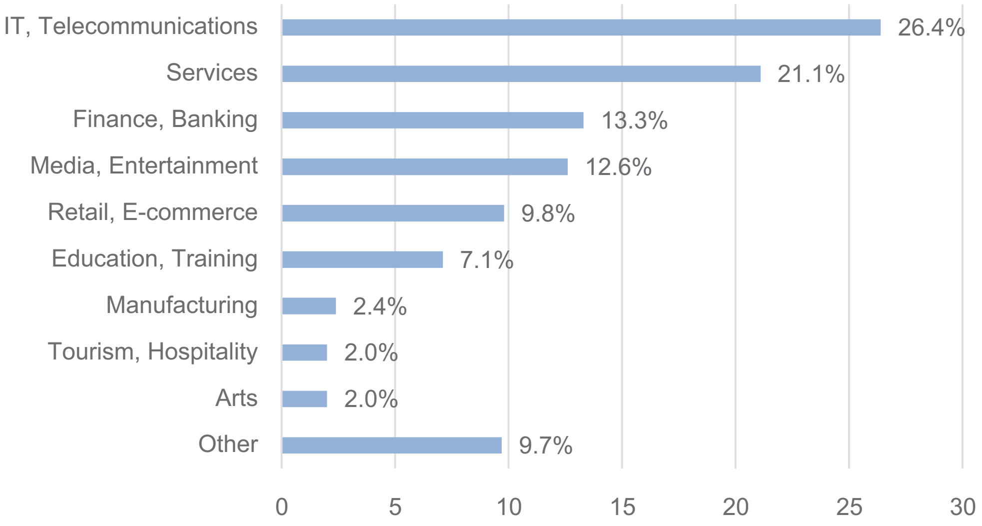


3.2. Jobs of Co-workers

The second set of questions investigated the kind of jobs of co-workers: What type of organisations and industries they work for, what business functions they fulfil, and which skills they need.

Industries. The industry with the highest representation is IT and telecommunication. Other industries representing at least 10 percent of co-workers are services (21.1 percent), finance and banking (13.3 percent), as well as media and entertainment (12.6 percent). Lower numbers of co-workers work in retail and e-commerce (9.8 percent), education and training (7.1 percent), manufacturing (2.4 percent), tourism and hospitality (2.4 percent), and arts (2.0 percent). Further 9.7 percent of the respondents are employed in other industries not specified in the questionnaire.

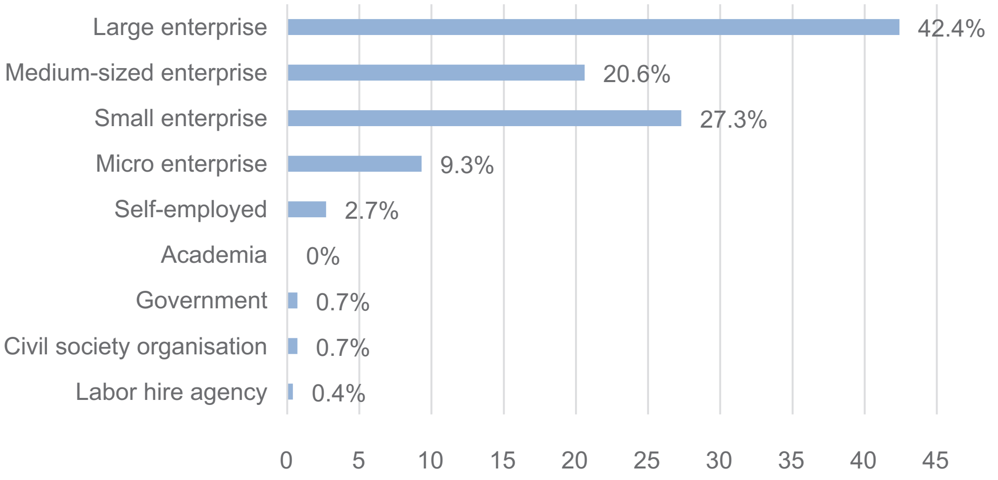
Figure 2.1: Industry



(Note: Respondents could select up to two answer options)

Employers. Co-workers almost exclusively work for organisations in the private sector. With 42.3 percent, the highest number of co-workers are employed at large enterprises with 250 employees or more. Further 20.6 percent work for medium-size enterprises (50-249 employees), 27.3 percent for small enterprises (i.e. 11-49 employees), and 9.3 percent for micro-enterprises (2-10 employees). Some 2.7 percent of co-workers stated to be self-employed. In very rare cases, co-workers work for either the government (0.7 percent), civil society organisations (0.7 percent), or labor hire agencies (0.4 percent).

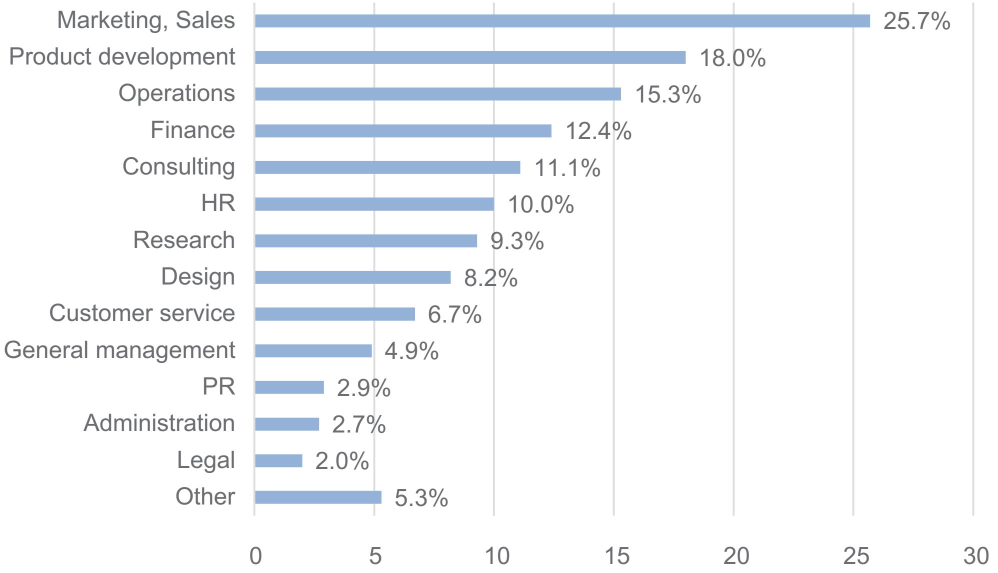
Figure 2.2: Type of organisation(s)



(Note: Respondents could select multiple answer options)

Business functions. Co-workers work across a variety of business functions. The highest number of respondents—one in every four (25.7 percent)— are employed in marketing and sales. Further business functions, which 10 percent of co-workers or more fulfil, are product development (18.0 percent), operations (15.3 percent), finance (12.4 percent), consulting (11.1 percent), and HR (10.0 percent). Beyond that, some co-workers are employed in research (9.3 percent), design (8.2 percent), customer service (6.7 percent), general management (4.9 percent), PR (2.9 percent), administration (2.7 percent), and legal (2.0 percent) business functions. Further 5.3 percent of respondents work in business functions not mentioned in the questionnaire.

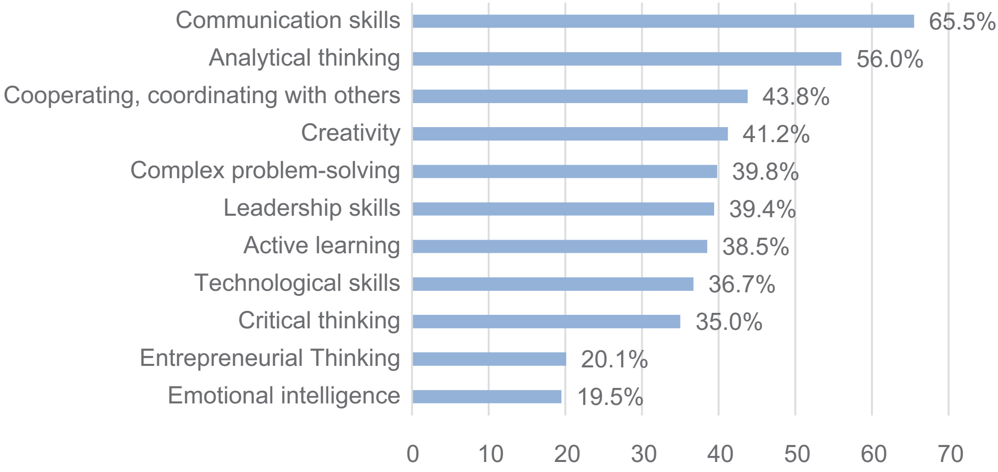
Figure 2.3: Business function of work



(Note: Respondents could select multiple answer options)

Core skills. The co-workers considered a variety of skills important for their work. The first and third most crucial skills are of an interpersonal nature: 65.5 percent of co-workers found communication, and 43.8 percent cooperating and coordinating with others important. The second top skill is analytical thinking, which 56.0 percent of co-workers considered important. Furthermore, creativity and complex problem solving are among the top five skills and deemed important by 41.2 and 39.8 percent of co-workers, respectively. Skills of moderate importance include leadership skills (39.4 percent), active learning (38.5 percent), technological skills (36.7 percent), and critical thinking (35.0 percent). In comparison, fewer co-workers considered entrepreneurial thinking (20.1 percent) and emotional intelligence (19.5 percent) as important skills.

Figure 2.4: Most important skills



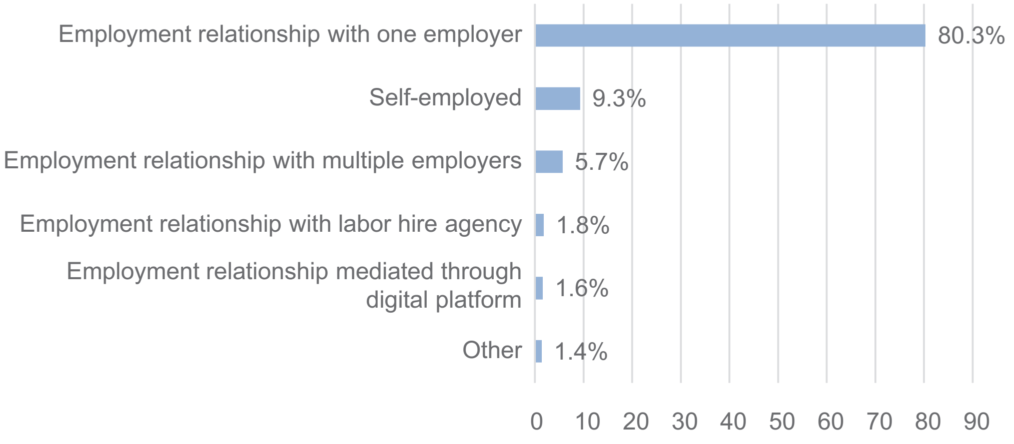
(Note: Respondents could select multiple answer options)

3.3. Work conditions

The third set of questions investigated the work conditions of co-workers: What kind of employment relationships and contracts co-workers have, what sort of salaries they receive in return for how many working hours, and how flexible their work arrangements are.

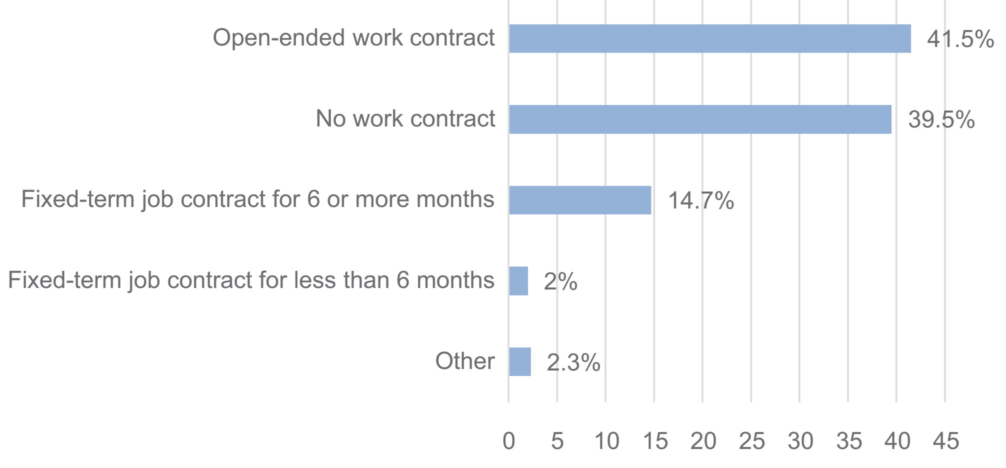
Type of employment relationship. A high 80.3 percent of co-workers have an employment relationship with one employer; 9.3 percent are self-employed; and 5.7 percent stated to be in an employment relationship with multiple employers. In rare cases, co-workers are employed through a labor hire agency (1.8 percent) or in an employment relationship mediated through a digital platform (1.6 percent).

Figure 3.1: Employment relationship



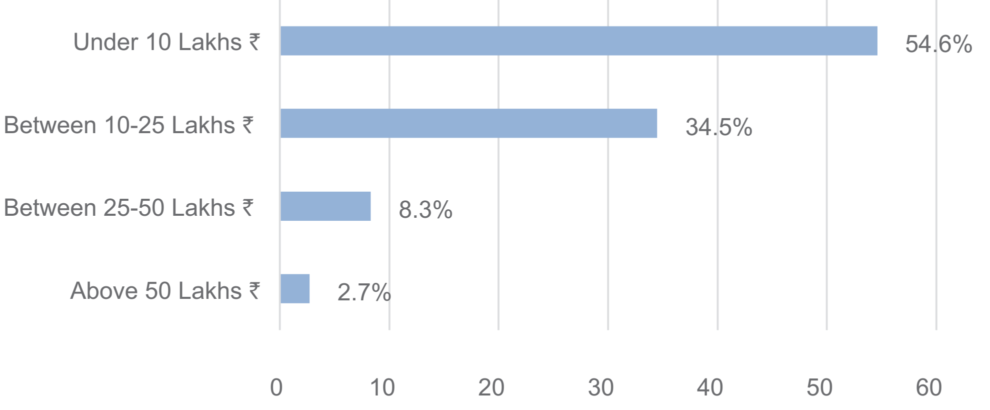
Type of work contract. Overall, more than every second co-worker (58.2 percent) had a job contract, whereas 41.5 percent were open-ended. Further 14.7 percent had a fixed-term contract of six months or more (14.7 percent), and 2.0 percent had a contract with a duration of less than six months. Moreover, 39.5 percent of co-workers did not have a work contract at all, and 2.3 percent checked the answer option "other" (for instance, because they are self-employed).

Figure 3.2: Work contract



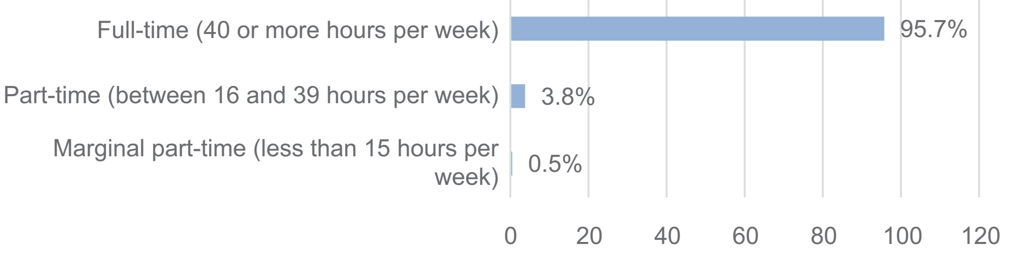
Yearly salary. Over half of the co-workers (54.6 percent) earn INR 10 Lakhs or less. 34.5 percent receive between INR 10 and 25 Lakhs, and 8.3 percent get between INR 25 and 50 Lakhs. Rarely co-workers (2.7 percent) earn INR 50 Lakhs or more.

Figure 3.3: Annual salary



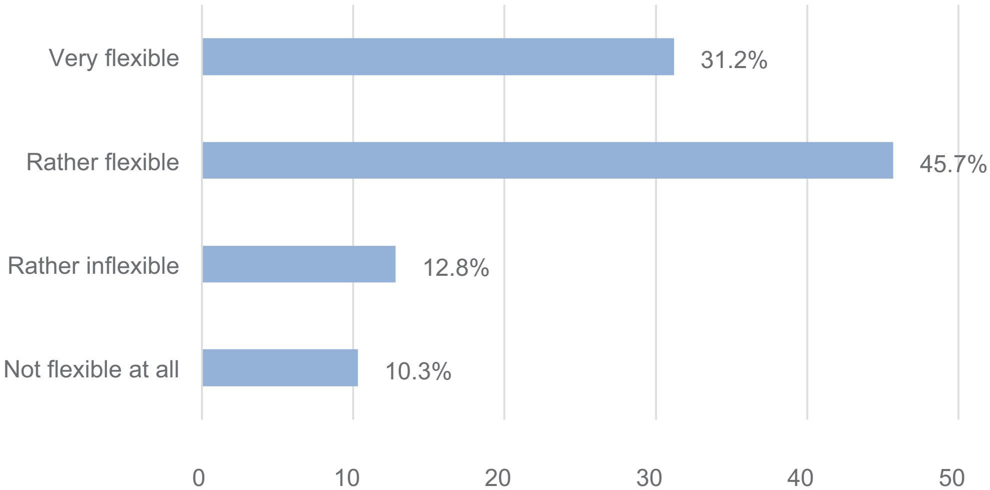
Working hours. Almost all (95.7 percent) of the respondents work full-time (i.e. 40 hours per week or more). Only few are engaged in part-time work (3.8 percent; between 16 and 39 hours), and marginal part-time jobs are even more uncommon (0.5 percent; 15 hours per week or less).

Figure 3.4: Weekly working hours



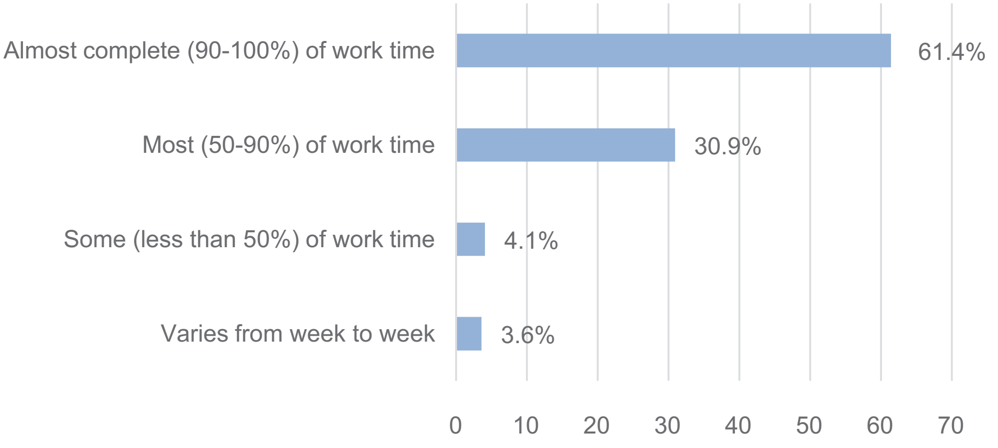
Flexibility with respect to working hours. Three out of four co-workers (76.9 percent) considered their working hours as flexible: 31.2 percent said they are "very flexible" and 45.7 percent "rather flexible". In contrast, an aggregate 23.1 percent of co-workers have inflexible working hours: 12.8 percent found them "rather inflexible" and 10.3 percent "not flexible at all".

Figure 3.5: Flexibility of working hours



Flexibility with respect to location. The majority of co-workers (61.4 percent) spend almost their entire work time (i.e. 90 to 100 percent of time) in the co-working space. Further 30.9 percent spend most of the work time (i.e. 50 to 90 percent of time) in the co-working space. Only few co-workers (4.1 percent) spend half of their work time or less in the co-working space, and 3.6 percent stated that the work time they spend in the co-working space varies from week to week.

Figure 3.6: Time spent at co-working space



Further work places. More than half of the co-workers (55.1 percent) work only at the co-working space, while 44.9 percent regularly work from other places as well. Among the latter group, the home office is most popular and used by 71.0 percent of co-workers. Further 16.5 percent regularly work from a corporate office, and 12.0 percent from other co-working spaces. Few co-workers work regularly from public cafés (5.5 percent), or while travelling in a car, train or plane (3.5 percent). Further 4.0 percent of co-workers work from other places not specified in the questionnaire.

Figure 3.7.1: Other places of work

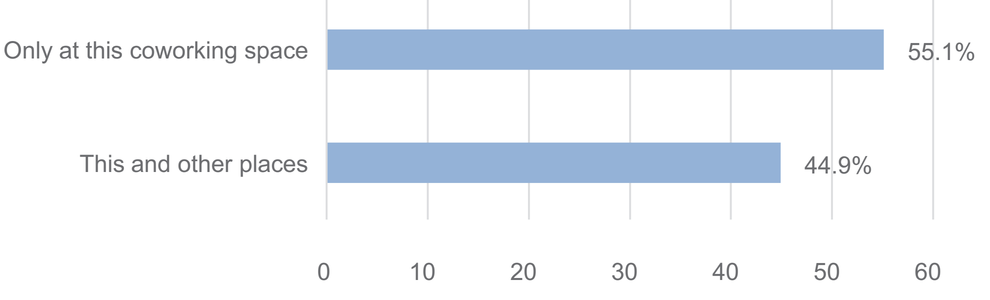
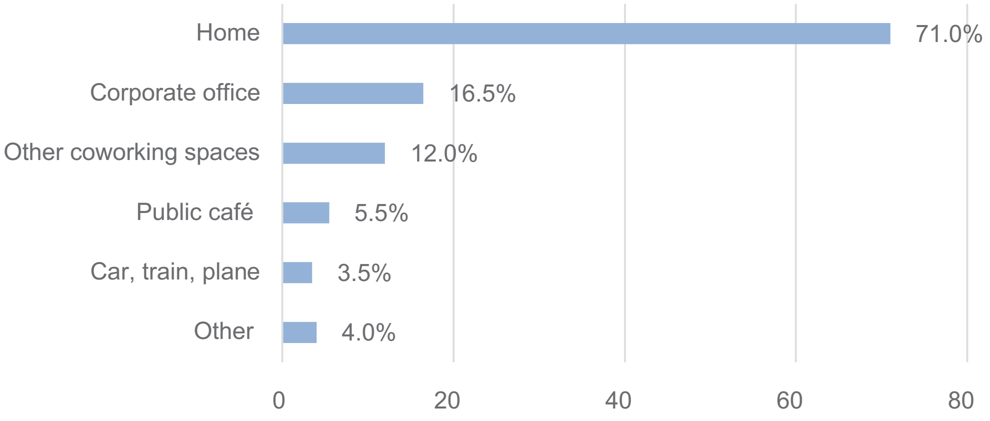


Figure 3.7.2: Other places of work



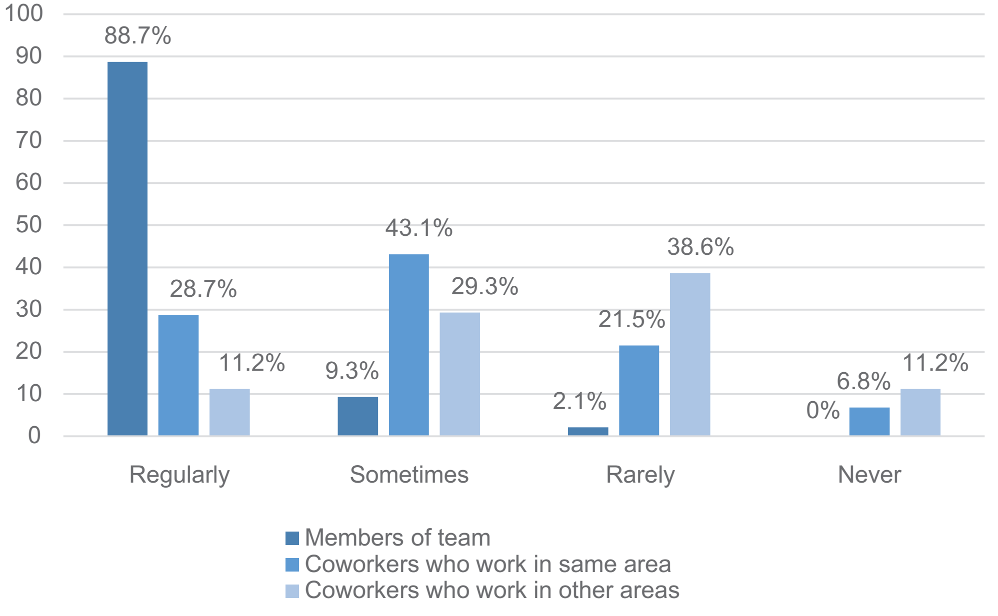
(Note: figure reflects answers of subgroup of co-workers, who stated in previous question to work from other places (see Figure 3.7.1); respondents could select up to two answer options)

3.4. Interactions between co-workers

The fourth set of questions explored interactions between co-workers: How and how often co-workers interact, what kind of relationships they aim to build, and how they benefit from such interactions.

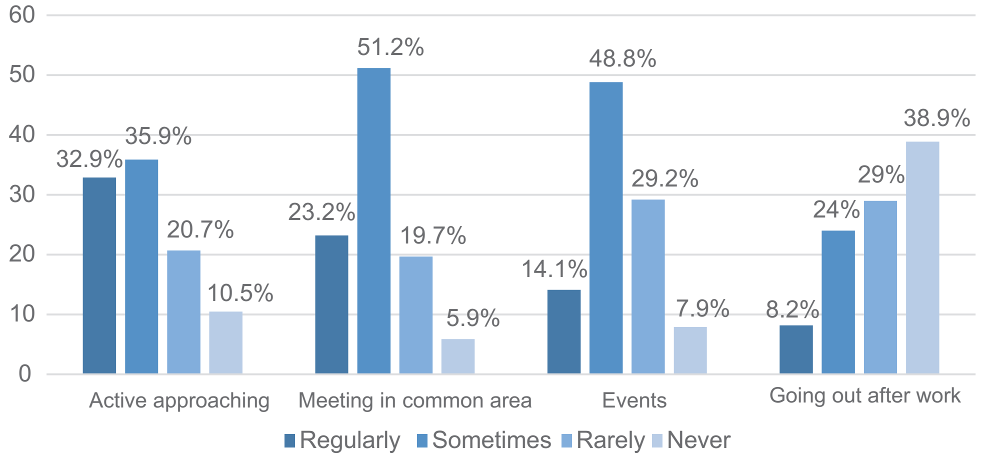
Frequency of interactions. Co-workers were found to interact most frequently with co-workers who are members of their team: 88.7 percent interact with them on a regular basis, 9.3 percent do so sometimes, and 2.1 percent only rarely. Furthermore, whether co-workers work in the same or in other areas influences the frequency of interactions: 28.7 percent interact with others in the same area regularly, 43.1 percent frequently, 21.5 percent rarely, and 6.8 percent never. In comparison, 11.2 percent of co-workers interact with peers in other areas regularly, 29.3 percent sometimes, 38.6 percent rarely, and 11.2 percent never.

Figure 4.1: Frequency of interaction with members of your team, co-workers (who work in same or other areas)



Ways of interaction. Common ways for co-workers to interact with their peers through actively approaching each other, through meeting in the common area and at events, or even going out together after work. 32.9 percent of co-workers regularly approach others, 35.9 percent do it sometimes, 20.7 percent rarely, and 10.5 percent never. Meeting in the common area, e.g. in the pantry or at lunch tables, is another frequently used way to get in touch with fellow co-workers: 23.2 percent do so regularly, 51.2 percent sometimes, 19.7 percent rarely, and 5.9 percent never. Meeting others at events is slightly less common: 14.1 percent of co-workers regularly interact with fellow co-workers at events, 48.8 percent sometimes, 29.2 percent rarely, and 7.9 percent never. Finally, some co-workers (61.2 percent) even go out together after work, at least every once and a while: 8.2 percent go out with fellow co-workers regularly, 24.0 percent sometimes, and 29.0 percent rarely.

Figure 4.2: Interactions with fellow co-workers



Preferred types of relationship. More than every second co-worker (57.5 percent) prefers to build professional relationships only, while every third (37.0 percent) is also open to establishing private contact with co-workers. Only few co-workers (5.5 percent) stated to have no or little interest in building relationships with peers.

Given that co-workers tend to be young und are often unmarried, some might consider dating someone, who they met at the co-working space. Four of every ten (42.5 percent) stated they have dated or – assuming they were single - could imagine dating a fellow co-worker. In contrast, 55.3 percent of co-workers are not open to dating a fellow co-worker.

Figure 4.3: Preferred relationship with fellow co-workers

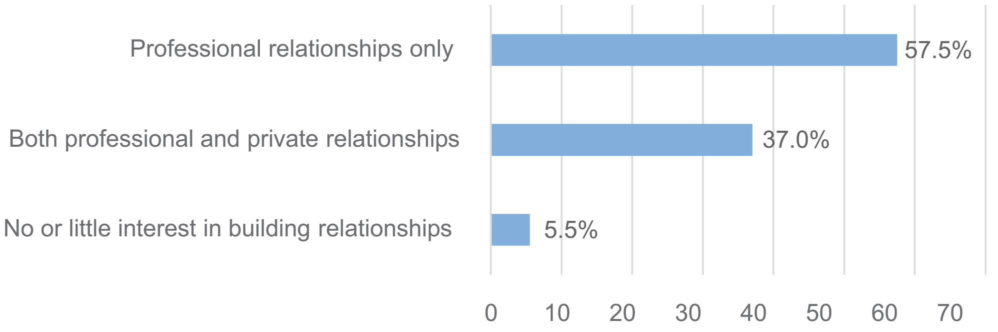
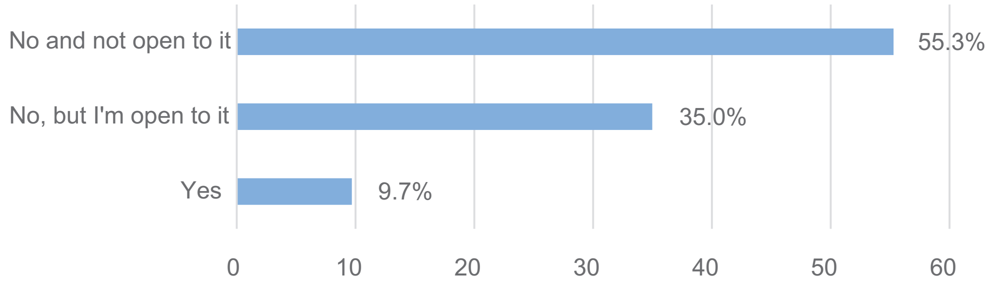
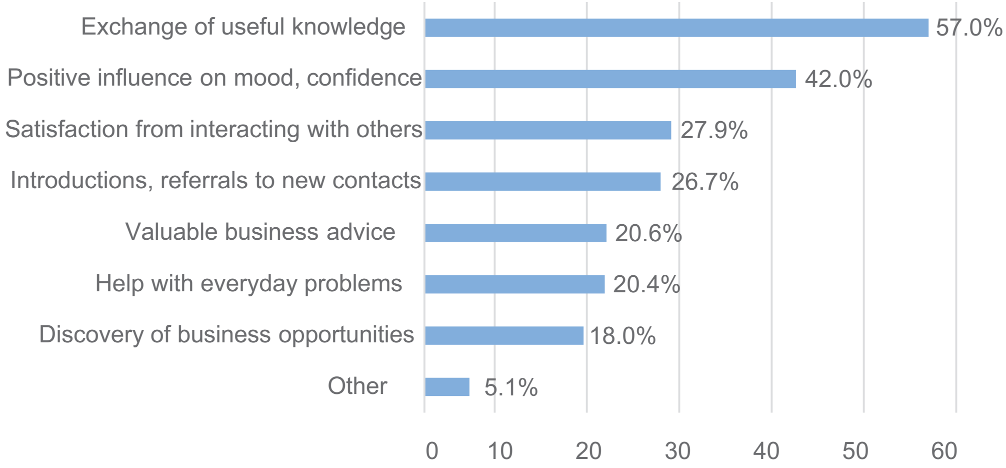


Figure 4.4: Dating fellow co-workers



Benefits of interacting. Co-workers benefit in various ways from interactions with their peers, whereas the exchange of useful knowledge was the most common benefit, which 57.0 percent of co-workers experienced. Further 42.0 percent of co-workers reported a positive influence on their mood and confidence and 27.9 derive satisfaction from interacting with others. Moreover, some benefitted from introductions and referrals to new contacts (26.7 percent), valuable business advice (20.6 percent), help with everyday problems (20.4 percent) or discovery of business opportunities (18.0 percent). Further 5.1 percent have benefited from interactions with other co-workers in ways not mentioned in the questionnaire.

Figure 4.5: Benefits from interactions with fellow members



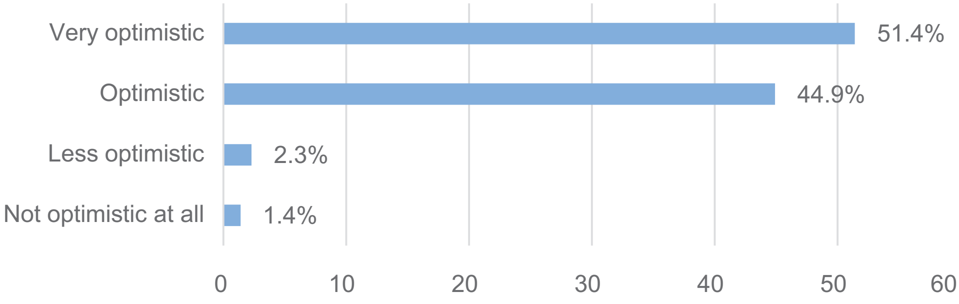
(Note: Respondents could select up multiple answer options)

3.5. Career aspirations

The fifth set of questions asked co-workers about their career aspirations: How co-workers assess their future work opportunities, what kind of job and career goals they have, and if they are interested in continuing education or starting their own business.

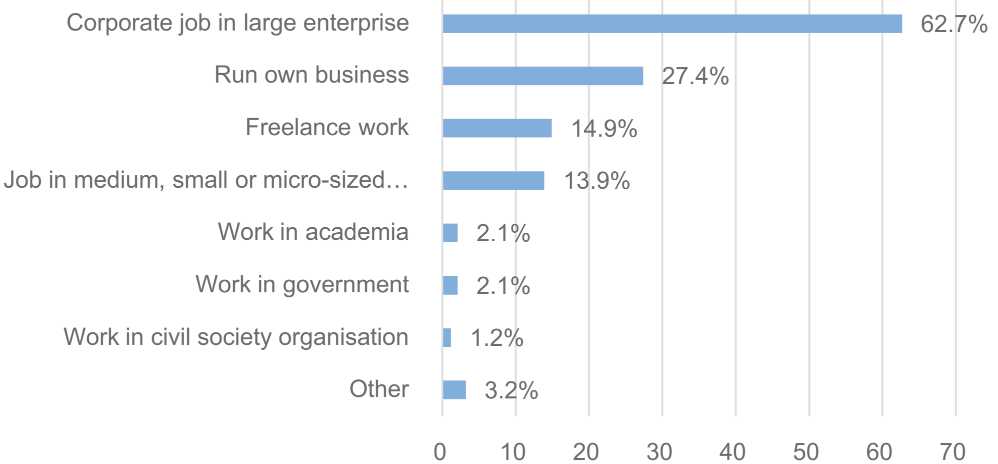
Outlook on future job opportunities. A remarkable majority (96.3 percent) of surveyed co-workers expressed optimism (44.9 percent) or even strong optimism (51.4 percent) in view of their future job opportunities. Only few co-workers have a pessimistic outlook: 2.3 percent considered themselves less optimistic, whereas 1.4 percent are not optimistic at all about their future job opportunities.

Figure 5.1: Optimism on future job opportunities



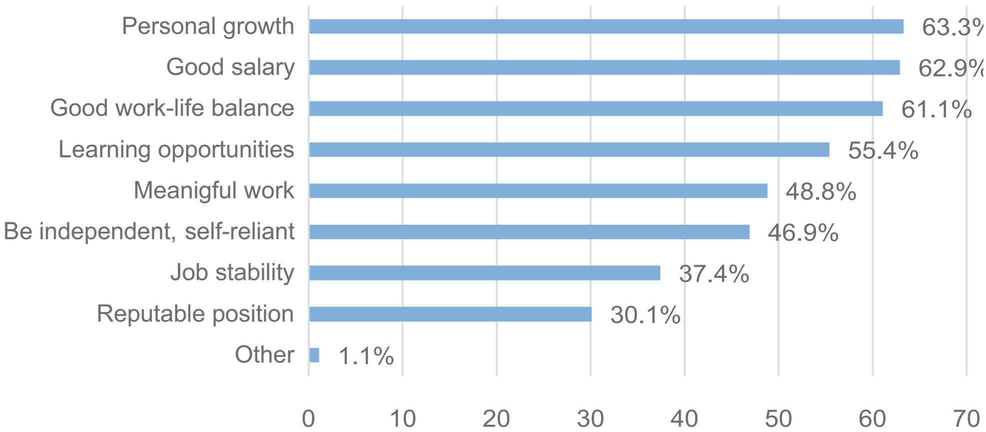
Job aspirations. In the medium term (i.e. in five years), 76.7 percent of co-workers aspire to work for a company, either a large enterprise (62.7 percent) or medium, small or micro-size company (13.9 percent). In contrast, running a business and engaging in freelance work are moderately attractive options, which 27.4 percent and 14.9 percent of co-workers, respectively, aspire to do in five years. Very few see themselves working in academia (2.1 percent), the government (2.1 percent), or a civil society organisation (1.2 percent). Further 3.2 percent aspire to do other kinds of work not specified in the questionnaire.

Figure 5.2: Aspirations in 5 years



Career goals. Personal growth (63.3 percent), a good salary (62.9 percent), and work-life balance (61.1 percent) turned out as the top three career goals, which more than 60 percent of co-workers considered important. Learning opportunities (55.4 percent), meaningful work (48.8 percent), and being independent and self-reliant (46.9 percent) are moderately important and were seen as career goals by between 40 and 60 percent of co-workers. In comparison, job stability (37.4 percent) and a reputable position (30.1 percent) were found to be least important, as only less than 40 percent of co-workers considered them as their career goals.

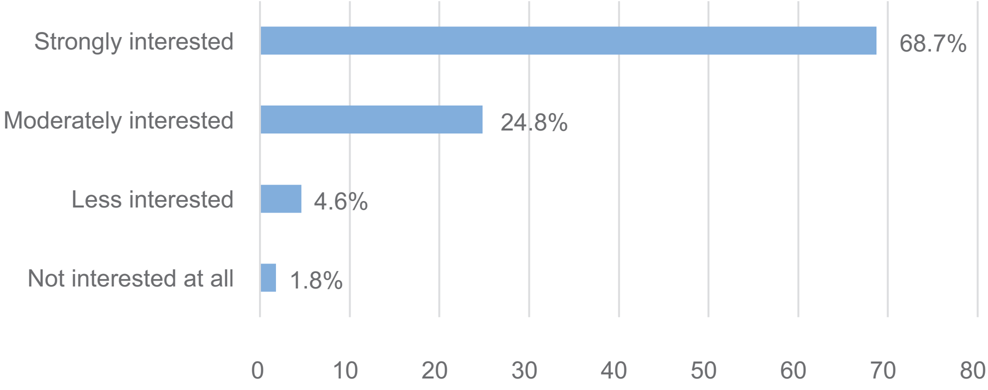
Figure 5.3: Career goals



(Note: Respondents could select multiple answer options)

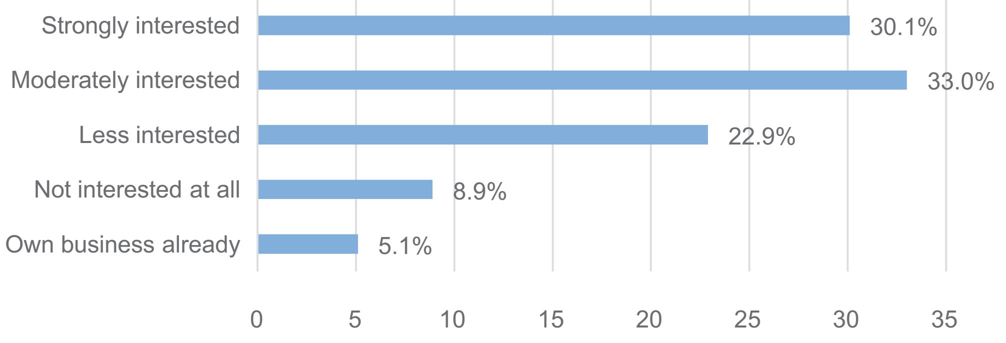
Interest in further education and starting a business. Many surveyed co-workers would like to continue their professional training or education: 68.7 percent of expressed a strong, and 24.8 percent a moderate interest. Only an aggregated 6.4 percent of co-workers stated to have "less" (4.6 percent) or "no interest at all" (1.8 percent).

Figure 5.4: Interest in continuing professional training/education



Interest in starting a business. Interest of co-workers to start their own business was comparatively lower than for continuing education, but still on a high level: 30.1 percent of co-workers expressed a strong, and 33.0 percent a moderate interest. An aggregated 31.8 percent of co-workers felt less (22.9 percent) or no interest at all (8.9 percent) to start their own business. A small 5.1 percent of co-workers answered that they already have their own business.

Figure 5.5: Interest in starting own business

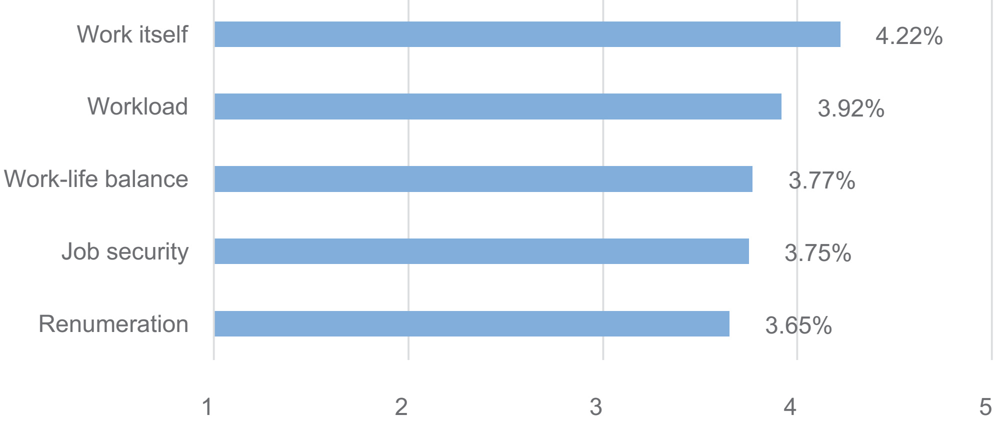


3.6. Overall satisfaction

The final question asked co-workers to rate their satisfaction with regards to different aspects of their work, i.e. the work itself, work load, remuneration, work-life balance, and job security.

The rating scale allowed five answer options from 'very unsatisfied' (value 1) to 'very satisfied' (value 5). In comparison, the co-workers are most satisfied with the work itself; the average value is 4.22, which lies between 'satisfied' and 'very satisfied'. The average values of the four further aspects lie between 3 and 4, which corresponds to being between 'satisfied' and 'neutral'. The average satisfaction values of co-workers with their work load is 3.92, work-life balance is 3.77, job security is 3.75 and remuneration is 3.65.

Figure 6: Satisfaction with the (...)



4. DISCUSSION

Some key observations become apparent in the context of the future of work in India.

Co-working spaces are predominantly populated by men, but the rate of female co-workers (39.6 percent) is significantly higher than the overall labour force participation rate of Indian women (26 percent in 2018).[34] All of them are young, they are digitally savvy and much sought after, as can be seen by the fact that the industries employing the highest numbers of co-workers (i.e. IT and telecommunication, finance and banking, media and entertainment) are most affected by digitalisation. Working across a variety of business functions, co-workers consider communication, cooperating and coordinating with others, analytical thinking, creativity and complex problem-solving as the most important skills in their work. This result is in line with the skills expected to become more crucial in the future of work. In particular, social and advanced cognitive skills, which humans can perform better than machines, will increase in demand.[35]

The surveyed co-workers were found to be well-educated, often willing to move for employment purposes, and have a strong motivation to grow personally. Most of them are in the early or middle stages of their careers and have high ambitions, as expressed in interest to continue training and education or start a business. However, the latter finding is somewhat contradictory, as in another question (see figure 5.2) co-workers expressed strong aspiration to work in a corporate job in the medium term (76.6 percent). Thereby, company size strongly matters: A job in a large enterprise is seen as much more desirable (62.7 percent) than a job in a medium- or small-size company (13.9 percent). Few co-workers aspire to work in the public or civil society sectors. Already, co-workers work almost exclusively for private sector companies, mostly large (42.4 percent) and medium-size (20.6 percent) firms. Only around half as many co-workers work for small (27.3 percent) and micro-size (9.3 percent) enterprises. Note that these categories define company size by the number of employees (as described above) and do not say anything about whether companies are a startup or not.[36] While it has become fashionable to refer to all kinds of smaller business entities as startups, not each of them may meet the requirements of the official definition.[37]

In comparison to a high number of co-workers employed at companies of various sizes only less than 10 percent are self-employed. The low share of independent professionals suggests that the gig economy has not yet fully arrived in Indian co-working spaces. This is a difference to other co-working markets, such as the United States, where the share of freelancers is higher.[38] However, considering demand-driving factors and extrapolating already visible trends one can expect more independent professionals to take up work in co-working spaces in the upcoming years.

On the side of the job providers, 22 percent of Indian companies plan to replace at least some permanent workers with contract workers, and many are already experimenting with using freelance workers.[39] On the side of the job seekers, the survey found that 14.9 percent of co-workers aspire to work as freelancers, while another study found that 17 percent of young Indian women and 26 percent of men are interested in participating in the gig economy for their main source of income.[40] Similar to digital labour platforms, which connect job seekers and job providers online and present another key development in the future of work, co-working spaces can be seen as a physical platform for both sides find to each other. The interactions between co-workers, which happen at least occasionally, helped some surveyed co-workers get introductions and referrals and discover business opportunities. Hence, access to social capital as provided through the co-working spaces, can help freelancers find jobs and generate income.

Most surveyed co-workers work for one employer, while employment relationships initiated through a labour hire agency or mediated through a digital labor platform are rare. A large majority works full-time and almost half of the surveyed co-workers have open-ended contracts. However, as the future of work progresses and the gig economy becomes more mainstream, work conditions will change and the share of non-standard employment relationships increase. Thereby, part-time and temporary (often short-term) employment, subcontracting and multi-party employment relationships, as well as disguised employment (whereby workers are falsely classified as "self-employed") will become more common. All these work conditions imply higher informality, which means that workers face higher economic insecurity, as they are - in law or practice - not entitled to receive certain employment benefits and are less protected against discrimination and exploitation.[41]

In the survey, co-workers expressed a relatively high degree of satisfaction with their work as well as optimism about their future job opportunities. This result has to be put in perspective. Co-workers are young, digital savvy, and highly educated – therefore in high demand in the labour market, particularly by firms that are strongly affected by digitalisation. In order to attract and hire them, co-working spaces (especially those in the premium market segment) can serve as a recruitment tool. Working there appeals to millennials, as design and promoted culture cater to their zeitgeist, and co-working spaces put high emphasis on keeping co-workers "happy" and "engaged". What is more pivotal is that most co-workers currently still work as employees in rather standard employment relationships, which provide some degree of job security.

However, there is a danger that a "two-class society" of co-workers will emerge, as the gig economy turns more mainstream and companies hire more gig workers instead of permanent employees. By classifying them as "independent contractors", companies incur less liability and placing them as external collaborators in co-working spaces helps maintain financial and social distance. While flexibility was found to be the main pull factor for the gig economy, the survey showed that most co-workers (not just the self-employed) enjoy some flexibility in regards to schedule and location. However, in contrast to regularly employed co-workers, gig co-workers face more informal work conditions, whereas job insecurity is particularly manifested in the constant need to manage relationships and search for work.

5. CONCLUSION

The changing nature of work shall lead to the loss of some jobs and the creation of others that require radically changed skills. Flexible and agile ways of working will become more common and more work will be project-based and involve external staff. Purposefully designed offices can promote such new ways of working and co-working spaces fulfill many of the changing requirements of the labour market. This paper aimed to describe the development of the co-working industry in India, identified factors that drive the demand for co-working spaces, and explained the architecture, design and social aspects of these work environments. A survey aided in the investigation of the demographics of co-workers, the kind of jobs they do, their work conditions, interactions with other co-workers, career aspirations, and degree of satisfaction.

This paper makes four conclusions. First, the co-working work force is young, more female than in the overall labour force, and digital savvy. They are sought-after by industries that are highly affected by digital transformation, and rely strongly on social and advanced cognitive skills, which are becoming important as machines increasingly replace human labour in the future of work. Second, surveyed co-workers were found to be highly educated (most often in business and engineering fields) and show high degrees of ambitions. Somewhat paradoxically, while many co-workers indicate interest in starting an own business, the majority prefer working in a corporate job, preferably in a large enterprise, in the medium run. Third, the rate of self-employed co-workers is rather currently low but is expected to increase. In this regard, co-working spaces can serve as a physical platform and help freelancers meet new clients, identify business opportunities and generate income.

Fourth, the fact that the gig economy has not yet fully arrived in Indian co-working spaces, is reflected in the work conditions of co-workers. Most co-workers work full-time, often have open-ended work contracts and their employment relationships were rarely mediated through labour hire agencies or digital labour platforms. While standard employment relationships are still the norm among co-workers, the gig economy will turn more mainstream in the near future. These unfolding developments, which are also playing out in co-working spaces, should raise the attention of policymakers to the regulation of the gig economy to ensure basic standards of protection to all workers.

(The author thanks WeWork, especially Soumojit Basu, Sharika Kaul and their teams for providing access to its premises and co-workers for data collection. Further, the author is thankful for all interview partners and survey respondents for their time and willingness to participate in this study, as well as to Samir Saran, Arun Mohan Sukumar and anonymous reviewers for helpful feedback during the research process.)

ENDNOTES

1 Ernst and Young, Federation of Indian Chambers of Commerce and Industry (FICCI), and National Association of Software and Services Companies (NASSCOM), "Future of jobs in India – A 2022 perspective," 2017.

2 Shanthi S, "How big is the coworking industry in India?," Inc42, November 14, 2019.

3 Sahil Vora, "Is the coworking space bubble in India about to burst?", Forbes India, February 26, 2019, http://www.forbesindia.com/blog/infrastructure/is-the-coworking-space-bubble-in-india-about-to-burst/ ; Gretchen Spreitzer, Peter Bacevice, and Lydon Garrett, "Why people thrive in coworking spaces", Harvard Business Review, September 2015, https://hbr.org/2015/05/why-people-thrive-in-coworking-spaces .

4 Alessandro Gandini, "The rise of coworking spaces: A literature review," Ephemera theory & politics in organization, Vol. 15(1), 2015.

5 Tim Dunlop, "Co-working spaces are the future of work but that could be a good thing," The Guardian, April 24, 2017, https://www.theguardian.com/sustainable-business/2017/apr/24/co-working-spaces-are-the-future-of-work-but-that-could-be-a-good-thing .

6 Ernst and Young, Federation of Indian Chambers of Commerce and Industry (FICCI), and National Association of Software and Services Companies (NASSCOM), "Future of jobs in India – A 2022 perspective," 2017.

7 Sahil Vora, "Is the coworking space bubble in India about to burst?", Forbes India, February 26, 2019, http://www.forbesindia.com/blog/infrastructure/is-the-coworking-space-bubble-in-india-about-to-burst/ .

8 Ernst and Young, Federation of Indian Chambers of Commerce and Industry (FICCI), and National Association of Software and

Services Companies (NASSCOM), "Future of jobs in India – A 2022 perspective," 2017.

9 Ibid

10 Mamta Sharma, "Co-working sector is hot, but what's fueling the demand for "cool" offices?," The Economic Times, July 12, 2019, https://economictimes.indiatimes.com/small-biz/startups/features/co-working-sector-is-hot-but-whats-fuelling-the-demand-for-cool-offices/articleshow/70186498.cms .

11 Ernst and Young, Federation of Indian Chambers of Commerce and Industry (FICCI), and National Association of Software and Services Companies (NASSCOM), "Future of jobs in India – A 2022 perspective," 2017.

12 Sahil Vora, "Is the coworking space bubble in India about to burst?", Forbes India, February 26, 2019, http://www.forbesindia.com/blog/infrastructure/is-the-coworking-space-bubble-in-india-about-to-burst/ .

13 Ibid

14 Ernst and Young, Federation of Indian Chambers of Commerce and Industry (FICCI), and National Association of Software and Services Companies (NASSCOM), "Future of jobs in India – A 2022 perspective," 2017.

15 World Economic Forum, "8 ways how coworking is evolving," June 27, 2016, https://www.weforum.org/agenda/2016/06/8-ways-coworking-is-evolving/ .

16 Debroop Roy, "How co-working spaces are coping with the Coronavirus outbreak," Entrepreneur India, March 19, 2020, https://www.entrepreneur.com/article/347772 .

17 Sanghamitra Kar, „Covid-19 effecxt: Coworking spaces see empty aisles," The Economic Times, March 18, 2020, https://economictimes.indiatimes.com/small-biz/startups/newsbuzz/covid-19-effect-coworking-spaces-see-empty-aisles/articleshow/74683566.cms?from=mdr .

18 YourStory, “COVID-19: Co-working segment hit by lockdown,” April 6, 2020, https://yourstory.com/2020/04/covid-19-coworking-segment-lockdown .

19 Anshul Dhamija, “India’s informal gig economy turns mainstream,” Forbes India, August 8, 2018, http://www.forbesindia.com/article/future-of-work/indias-informal-gig-economy-turns-mainstream/50959/1 .

20 Wired, “The future of workspace”, 2018, https://www.wired.com/brandlab/2018/11/the-future-of-workspace/ .

21 World Economic Forum, “8 ways coworking is evolving”, June 27, 2016, https://www.weforum.org/agenda/2016/06/8-ways-coworking-is-evolving/ .

22 Doug White and Polly White, “4 benefits that explain why large companies are increasingly turning to coworking”, Entrepreneur India, September 6, 2018 https://www.entrepreneur.com/article/319605 .

23 Ernst and Young, Federation of Indian Chambers of Commerce and Industry (FICCI), and National Association of Software and Services Companies (NASSCOM), “Future of jobs in India – A 2022 perspective,” 2017.

24 Terri Chapman, Samir Saran, Rakesh Sinha, Suchi Kedia, Sriram Gutta, “The future of work in India: Inclusion, growth & transformation. An enterprise survey,” Observer Research Foundation and World Economic Forum, 2018.

25 Jaspreet Bindra, “The four inexorable trends shaping the future of work”, LiveMint, 19 September 2019, https://www.livemint.com/opinion/columns/opinion-the-four-inexorable-trends-shaping-the-future-of-work-1568882002818.html.

26 Ernst and Young, Federation of Indian Chambers of Commerce and Industry (FICCI), and National Association of Software and Services Companies (NASSCOM), “Future of jobs in India – A 2022 perspective,” 2017.

27 Mamta Sharma, "Co-working sector is hot, but what's fueling the demand for "cool" offices?", The Economic Times, July 12, 2019, https://economictimes.indiatimes.com/small-biz/startups/features/co-working-sector-is-hot-but-whats-fuelling-the-demand-for-cool-offices/articleshow/70186498.cms?from=mdr .

28 Shanti S, "How big is the coworking industry in India?," Inc42, November 14, 2019.

29 Anshul Dhamija, "India's informal gig economy turns mainstream," Forbes India, August 8, 2018, http://www.forbesindia.com/article/future-of-work/indias-informal-gig-economy-turns-mainstream/50959/1 .

30 Ernst and Young, Federation of Indian Chambers of Commerce and Industry (FICCI), and National Association of Software and Services Companies (NASSCOM), "Future of jobs in India – A 2022 perspective," 2017.

31 Sanjeev Sinha, "What is driving the growth of co-working space in India?," Financial Express, March 6, 2019, https://www.financialexpress.com/money/what-is-driving-the-growth-of-co-working-space-in-india/1506720/ .

32 Gretchen Spreitzer, Peter Bacevice, and Lydon Garrett, "Why people thrive in coworking spaces", Harvard Business Review, September 2015, https://hbr.org/2015/05/why-people-thrive-in-coworking-spaces .

33 Alessandro Gandini, "The rise of coworking spaces: A literature review," 2015, ephmera: theory & politics in organization, 15(1), 193-205.

34 The Economist, "Women in India: How India fails its women," July 5, 2018.

35 World Bank, "World Development Report 2019: The changing nature of work," 2019, World Bank: Washington, DC.

36 A large enterprise is defined as having 250 or more employees, medium-sized companies 50-249 employees, small enterprises 11-

49 employees, micro enterprises 2-10 employees.

37 According to the official definition of the government, startups are entities, which are in their first five years of setting up their operations, do not have a turnover above 25 crores, and work towards innovation, development, deployment, and commercialization of new products, processes, or services driven by technology or intellectual property. See: Aditya Bhushan Dwivedi, “The government has finally defined the word ‘startup’,” YourStory, February 24, 2016, https://yourstory.com/2016/02/government-definition-startup .

38 Anshul Dhamija, “India’s informal gig economy turns mainstream,” Forbes India, August 8, 2018, http://www.forbesindia.com/article/future-of-work/indias-informal-gig-economy-turns-mainstream/50959/1 .

39 Terri Chapman, Samir Saran, Rakesh Sinha, Suchi Kedia, Sriram Gutta, “The future of work in India: Inclusion, growth & transformation. An enterprise survey,” Observer Research Foundation and World Economic Forum, 2018.

40 In comparison, 35 percent of women and 26 percent of men are not interested in participating in the gig economy for their main source of income. See: Vidisha Misra, Terri Chapman, Rakesh Sinha, Suchi Kedia, Sriram Gutta, “Young India and work: A survey of youth aspirations,” Observer Research Foundation and World Economic Forum, 2018.

41 Sabrina Korreck, “The future of work: Embracing informality”, Observer Research Foundation, January 27, 2020, https://www.orfonline.org/expert-speak/the-future-of-work-embracing-informality-60680/ .

ANNEX

The universal questionnaire given to all the respondents delved into the following issues:

1. *Demographics*

    1.1. What is your gender?

    1.2. What is your age?

    1.3. What is your marital status?

    1.4. Where is your place of birth?

    1.5. Where is your current place of residence?

    1.6. Since you accepted your current job, have you moved your place of residence?

2. *Jobs*

    2.1. In which industry are you working?

    2.2. What type of organization(s) do you work for?

    2.3. Which business function does your work relate to?

    2.4. Which skills are most important in your work?

3. *Work conditions*

3.1. What kind of employment relationship do you currently have?

3.2. What kind of work contract(s) do you have?

3.3. In which range does your yearly salary fall?

3.4. How many working hours do you work in average per week?

3.5. How flexible are your working hours?

3.6. How much of your work time do you spend at this co-working space?

3.7. From which other places do you regularly work?

4. *Interactions among co-workers*

4.1. How frequently do you interact with...

- ... members of your team

- ... co-workers, who work in the same area?

- ... co-workers, who work in other area?

4.2. How do you interact with fellow co-workers in person?

- through active approaching?

- through meeting in common area?

- through events?

- through going out after work?

4.3. What kind of relationships do you prefer to have with your co-workers?

4.4. Have you dated, or assuming you were single, could you imagine dating fellow co-workers?

4.5. How have you benefitted from interactions with fellow members?

5. *Career aspirations*

5.1. How optimistic are you about your future job opportunities?

5.2. What kind of work do you aspire to do in the medium term (i.e. 5 years)?

5.3. What are your most important career goals?

5.4. How interested are you in continuing your professional training / education?

5.5. How interested are you in starting your own business?

6. *Overall satisfaction: How would you rate your satisfaction with…*

    - … the work itself?

    - … your workload?

    - … the renumeration of your work?

    - … the security that your job offers?

    - … your work-life balance?

Observer Research Foundation (ORF) is a public policy think tank that aims to influence formulation of policies for building a strong and prosperous India. ORF pursues these goals by providing informed and productive inputs, in-depth research, and stimulating discussions. The Foundation is supported in its mission by a cross-section of India's leading public figures, academic and business leaders.

ORF OBSERVER RESEARCH FOUNDATION

Ideas • Forums • Leadership • Impact

20, Rouse Avenue Institutional Area, New Delhi - 110 002, INDIA
Ph. : +91-11-43520020, 30220020. Fax : +91-11-43520003, 23210773
E-mail: contactus@orfonline.org
Website: www.orfonline.org