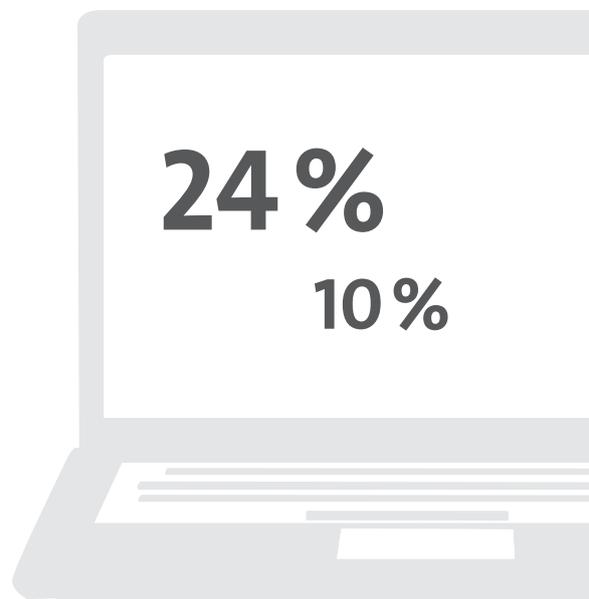
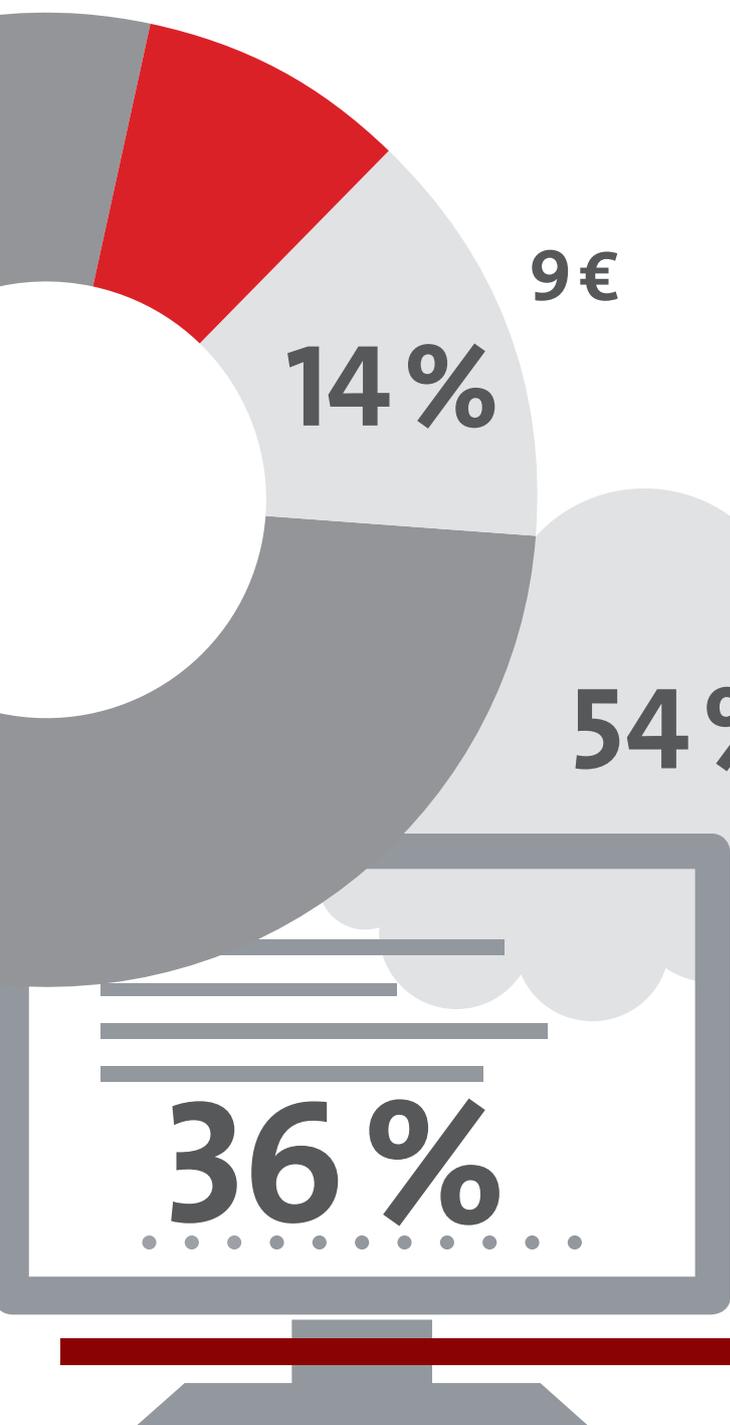


# WORKPLACE OF THE FUTURE

MATURITY SURVEY 2018



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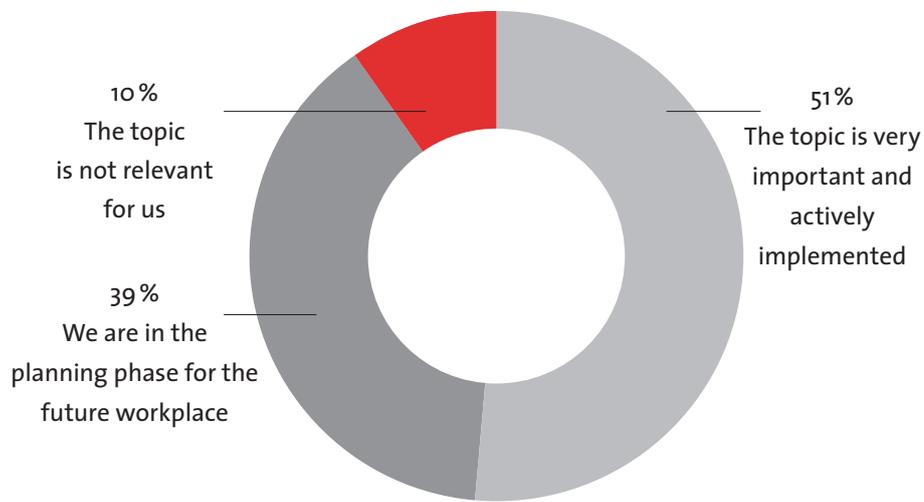


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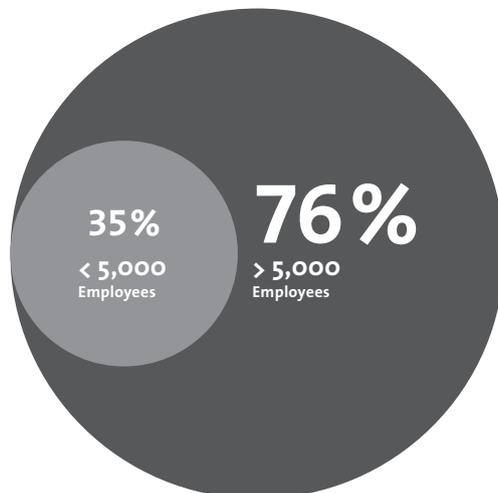
MATURITY

# MATURITY SURVEY 2018

## Status of the future workplace



## The future workplace is important and actively implemented - agreement by company size



Source: Maturity Online Survey, June 2018, n = 127

## MANAGEMENT SUMMARY

The “workplace of the future” is a journey and not a destination. Many companies have already set off and got to know the challenges of the route. And this is not just about IT, but much more.

### EMPLOYER OF THE FUTURE

European companies are facing an enormous challenge: most of their office workplaces must be adapted to the requirements of the future. Flexibility, data access anywhere and anytime, security, communication and collaboration are necessary to harness the dynamics of digital transformation and to retain employees. The evolution is driven by the requirements of business units and employees, but also by the intended reduction in office space. This is primarily due to IT and senior management, as our survey from summer 2018 shows:

*“In one out of three companies, top management is driving the design and implementation of workplace change.”*

The fact that senior management is behind the initiative provides a basis for its success. After all, many construction sites in the organisation - HR, legal, processes, real estate and office equipment as well as IT - must be prioritised and coordinated. Nevertheless, it can be expected that it will take a few years before the workplace of the future takes shape. And not every organisation will have

regeneration zones and campus parks - but reliable, stable and usable IT systems are the minimum that companies have to offer their employees.

This poses a number of challenges for IT organisations. It starts with the time-to-market of their services and continues with support processes as well as budget assignment. Higher security requirements due to mobility and the cultural change of companies are at the forefront. However, even in five years' time there will be no magic formula for this multi-faceted and complex task. There is not the standardized employee, but roles with specific requirements and people from three generations with individual preferences. In addition to Digital Immigrants and Generation X, usage behaviour of Millennials must also be taken into account. And the so-called “Alphas” are already taking their first steps.

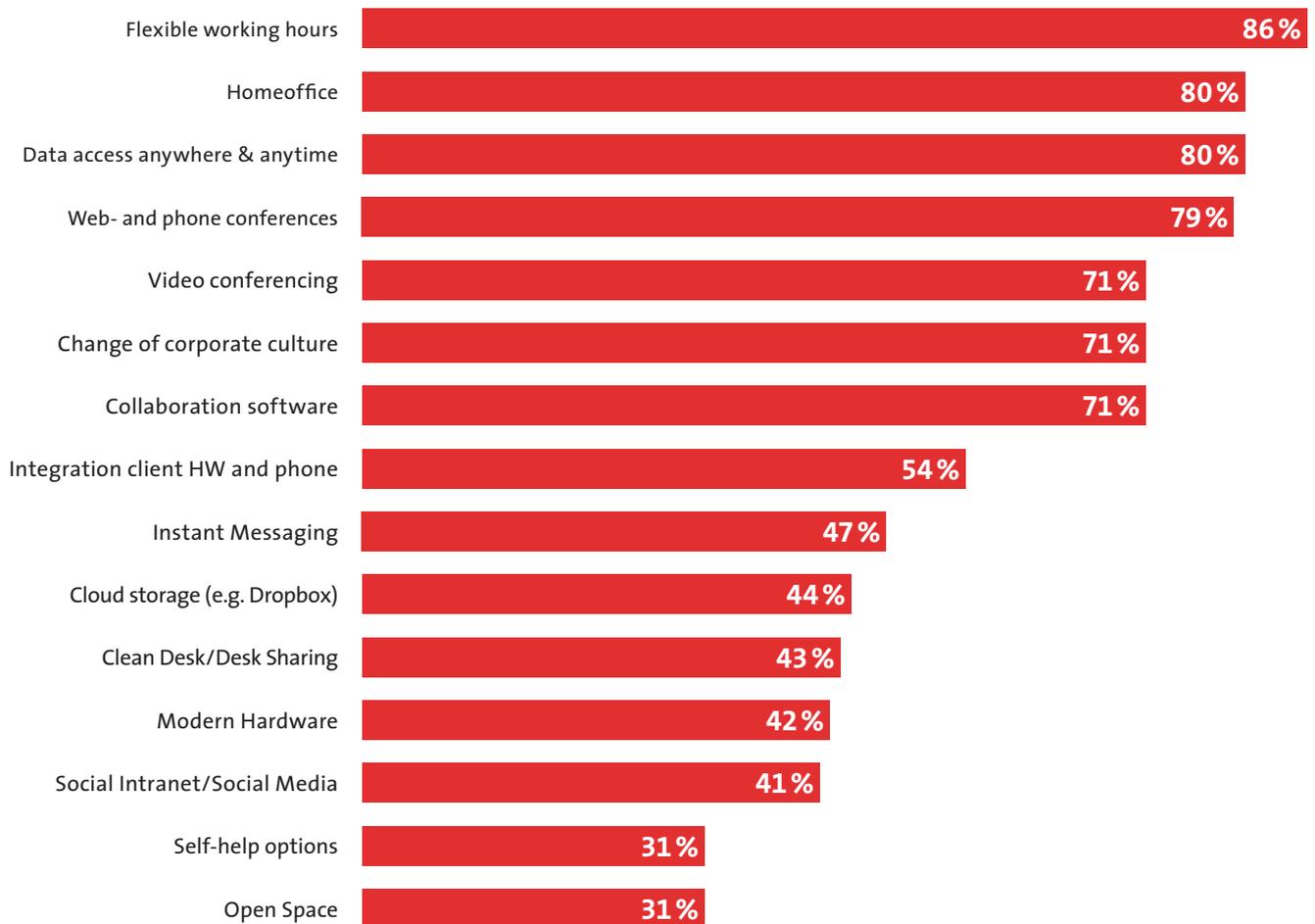
The era of standardised workplaces (in terms of time, space and technology) is drawing to a close. Modern offices are no longer just computers and telephones; they are a corporate message to its employees. Thus, the discussion about the “workplace” of the future somewhat restricts the perspective. Ultimately, there is much more at stake - namely the “employer of the future”.

# 1. GOOD REASONS

The multitude of requirements shows the complexity of the topic. At the top of the list are new models of working hours and flexibility in the places of work.

- The workplace of the future is closely linked to the trendy concepts of agility and flexibility. Demands for greater mobility relate to working hours, working places and IT.
- The first technical topic is the demand for data access from all locations and at all times. The hardware itself is not very important compared to other requirements; this topic lands at the rear of the ranking.
- The priorities of future workplace requirements show no significant correlation in relation to company size.

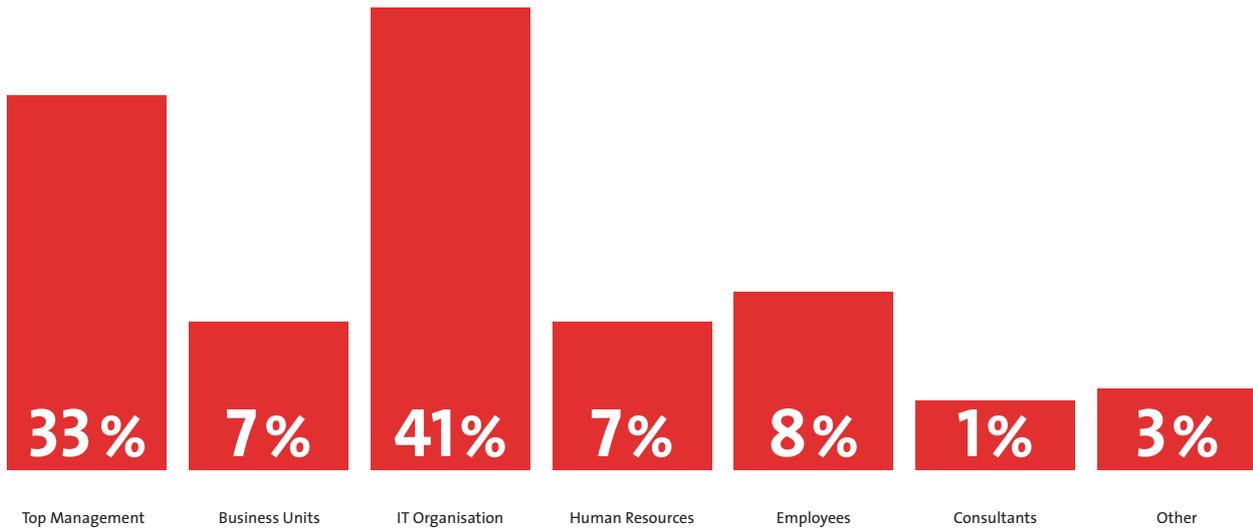
## Requirements for the future workplace



Multiple answers

## 2. POWERFUL DRIVERS

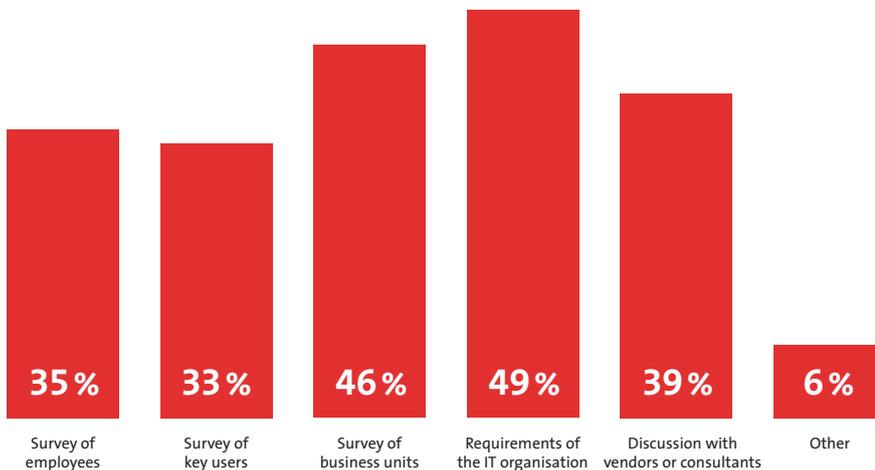
### Drivers in the organisation



In one third of the companies, top management is driving the transformation to the workplace of the future. At the top, however, is IT. What is surprising is the low

proportion of business units. After all, it is about the environment of their workforce, which should be ideally equipped to meet the challenges of the digital world.

### How will the requirements be collected?



Multiple answers

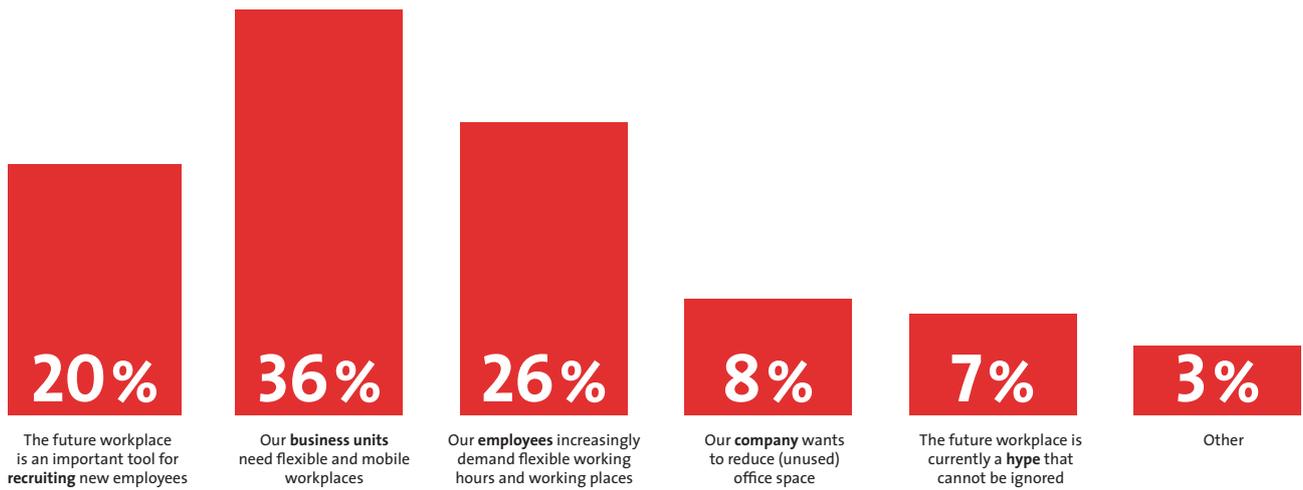
The involvement of employees is always mentioned as a key success factor in managing corporate change (see point 5: “Obstacles along the way”). At first glance, the survey reveals a supposed deviation from the ideal, because in most companies the specifications for the workplace of the future come from IT organisations. If you look behind the multiple answers, however, you can see that most companies take a multi-track approach. For example, those who put IT at the top of the field also surveyed their users and key users to a large extent. In addition, there are the requirements expressed by the business units.

### 3. MANY GOALS

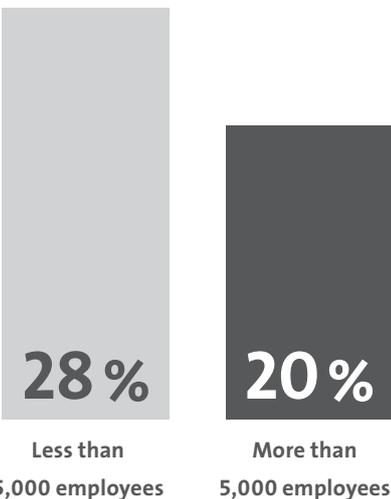
The requirements of the business units and attractiveness as an employer are the most important arguments for the transformation to a Future Workplace. Every twelfth company wants to reduce office space.

- Larger organisations in particular want to curb vacant office space.
- In smaller companies, an above-average number of employees require flexible working hours and locations.
- For one in five companies, the workplace of the future is the most important factor in recruiting new workers.

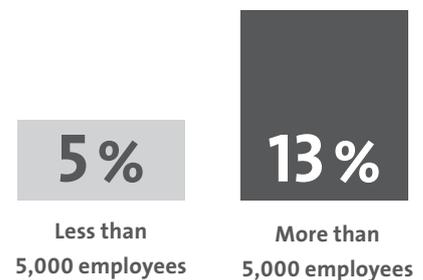
#### Arguments for the future workplace



#### Future workplace driver: Employees want flexibility



#### Future workplace driver: Reducing office space

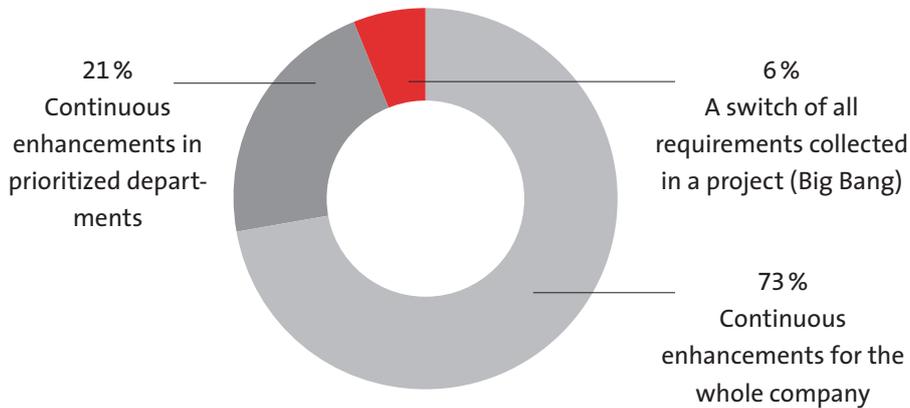


## 4. THE WAY FORWARD

A policy of step-by-step: Only a small proportion of companies rely on the Big Bang for future workplaces. Instead, the changeover will take place in several stages - mainly with the support of external consultants.

Nearly three-quarters of the companies transform all of their workplaces in a continuous and comprehensive development process, one in five companies is improving selected departments. Consultants are often used: IT experts come first, change management and HR consultants last. The latter in particular, however, are important to prepare employees for upcoming changes and to take them on the journey.

### Transformation to the future workplace



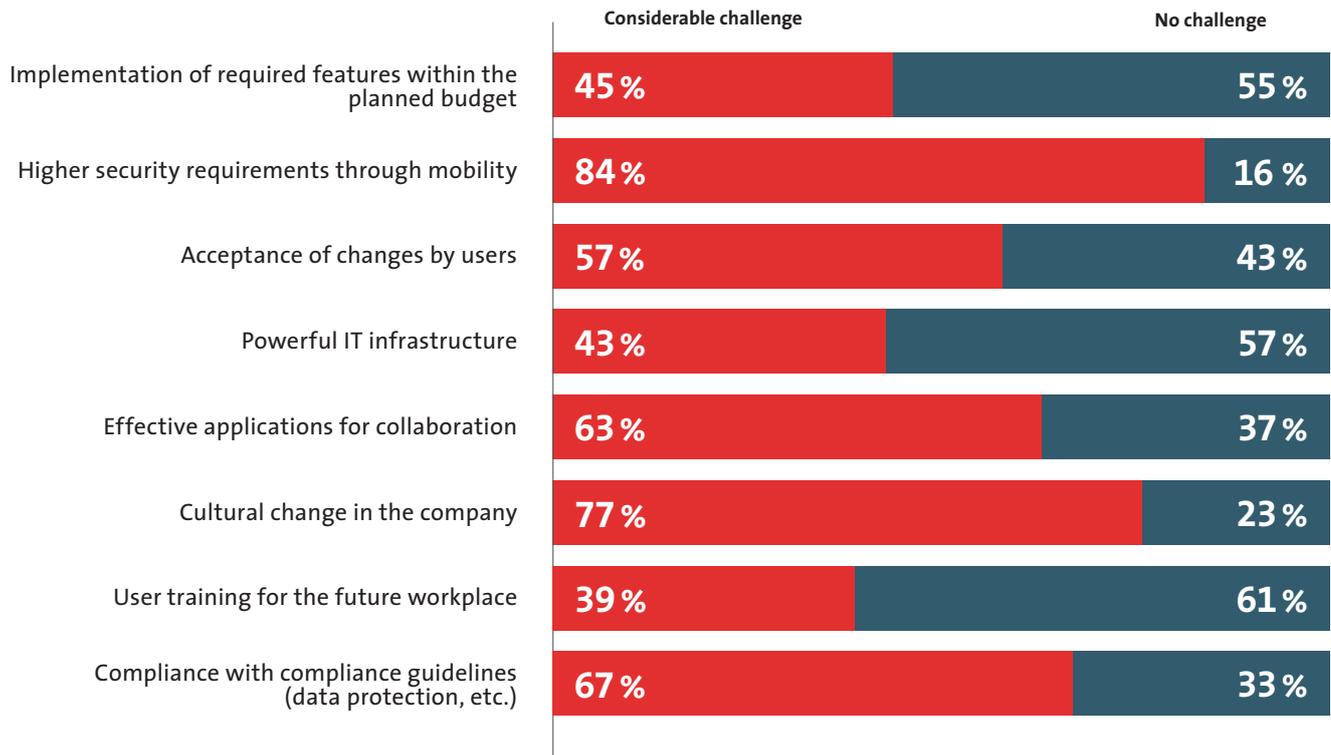
### How to deploy?



Multiple answers

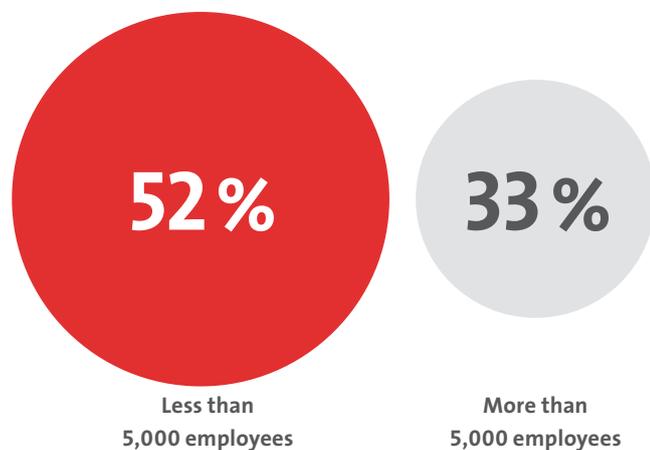
## 5. OBSTACLES ALONG THE WAY

### Challenges for the IT department



IT organisations are faced with various tasks in the course of modernising workplaces. As their biggest challenge, respondents stated higher security requirements due to mobility, followed by the cultural change of a company. Experience has shown that this transformation refers not only to the level of the employees, but also to management and processes. In the free answers, new management culture and changes in leadership values were mentioned as challenges. On the other hand, IT infrastructure is not seen as a challenge. However, there are differences according to the number of employees: 52 percent of smaller companies are concerned about servers, storage and networks.

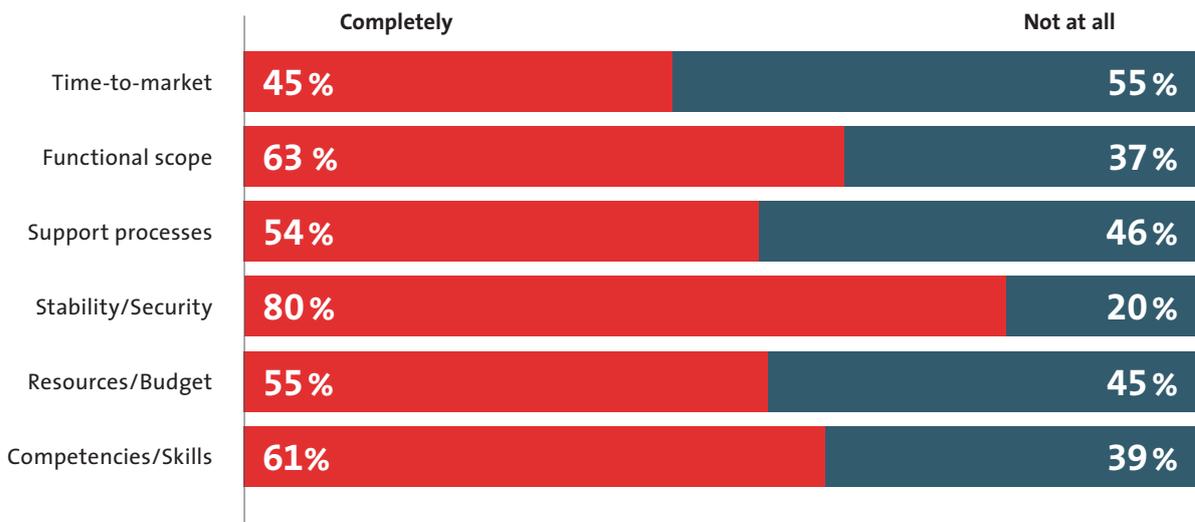
### Our IT infrastructure is a challenge - agreement by company size



## 6. IT HOMEWORK

Things are looking up - at least in terms of IT costs. Almost half expect an increase here. In addition, IT organisations must be able to deliver faster.

### Can your current IT fulfil the following requirements?

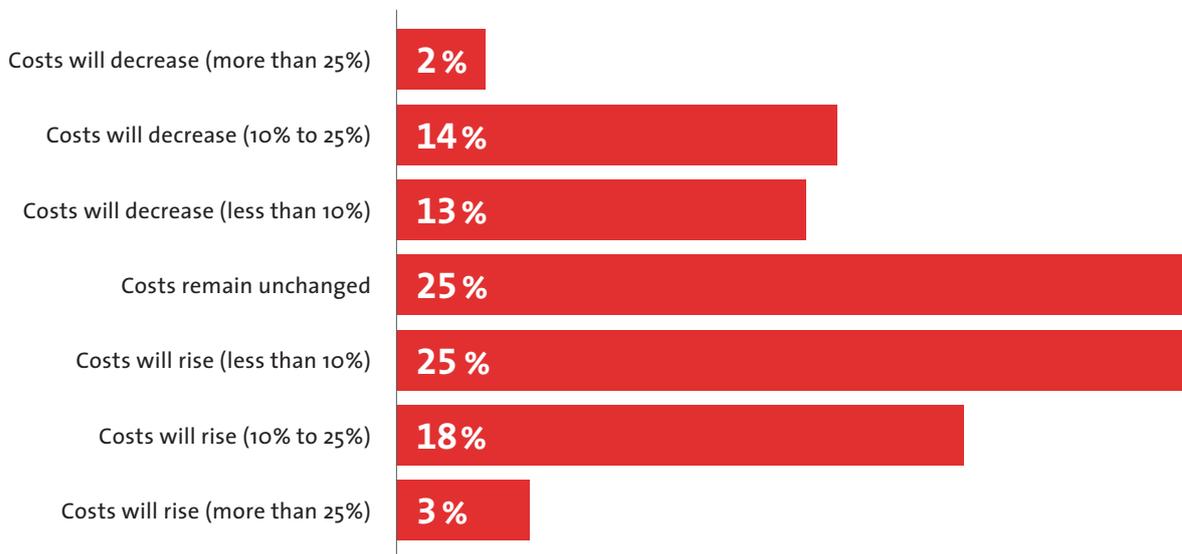


IT is best rated in terms of security and stability. On average, the positive assessment is around 60 percent. Only the

time-to-market, on contrast, gets a low value. Seen from the other direction, the gaps cannot be ignored - many tasks

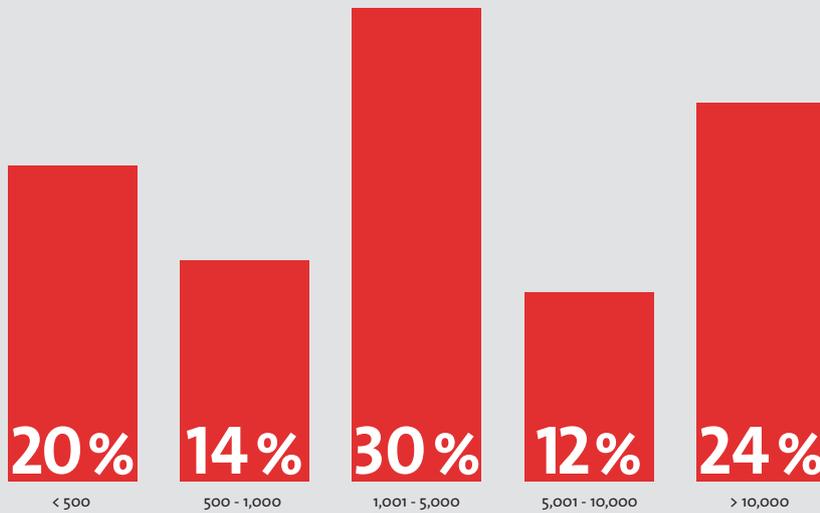
still lie ahead for IT organisations. And only 29 percent expect the future workplace to reduce IT spending.

### Expected impact on IT costs



## ABOUT THE SURVEY

### Numbers of Employees

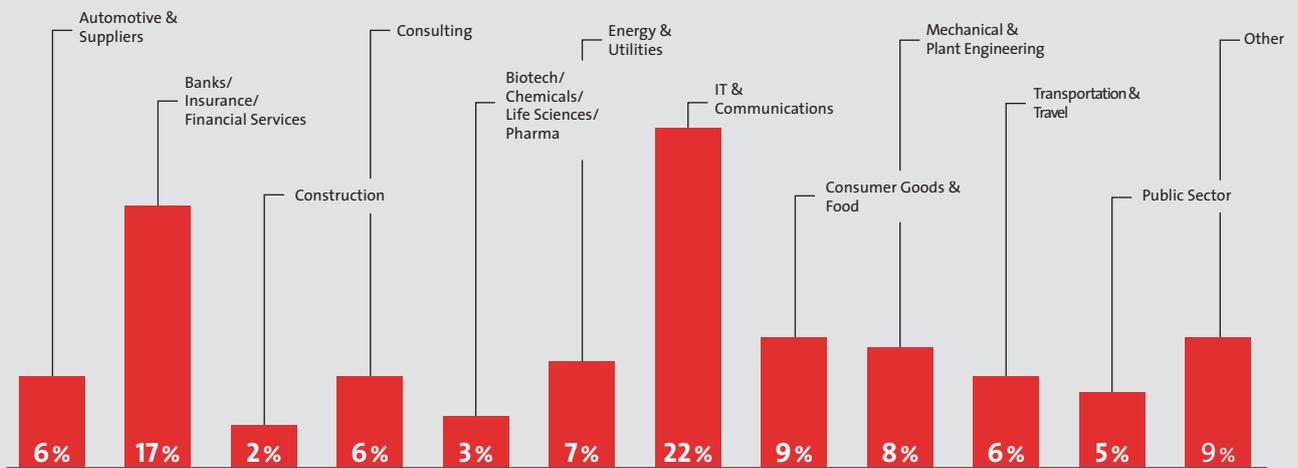


The survey **"Workplace of the Future"** is based on an online survey conducted in summer 2018 by Maturity. European managers from business units and IT were interviewed.

In total, 127 participants answered the questions, amongst them CIOs and IT directors, IT managers, IT project managers, procurement managers and comparable functions.

Further studies on the IT agenda and IT sourcing can be found at [www.maturity.com/en/downloads.html](http://www.maturity.com/en/downloads.html)

### Industry sectors



Source: Maturity Online Survey, June 2018, n = 127



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