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# German Social Collaboration Study 2023.



DEUTSCHE  
SOCIAL  
COLLABORATION  
STUDIE

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## Key statements.

Based on a survey of 885 employees in Germany, Austria and Switzerland, the German Social Collaboration Study 2023 has arrived at the following key findings.

- 1 The digital workplace has become a key factor in the competition to bring in and retain employees, as nearly two-thirds of those surveyed report.
- 2 The results show a strong correlation between an advanced digital workplace and positive employee experience.
- 3 Hybrid and remote work options are viewed as enhancing loyalty. 73.7% of hybrid workers feeling a sense of belonging with their company.
- 4 The quality of hybrid and remote work increases the more developed the digital workplace is.
- 5 Hybrid and remote work has enhanced personal well-being for the majority of participants.
- 6 Respondents most appreciate transparent communication and a wide range of continuing and professional education options within the company.
- 7 Positive employee experience among frontline workers also increases with the development of the digital workplace.
- 8 Companies that have already made great advances in implementing the digital workplace see only minor challenges in the area of security, unlike those where implementation is still in its early days.
- 9 Survey respondents' main expectations for the metaverse are that it will be helpful with development of innovations. Participants tend to view the metaverse as playing a more crucial role within the company the farther up the leadership responsibility scale they are placed.
- 10 Contrary to the widely held belief that younger workers would prefer greater digitalization of the workplace for remote work, the survey shows that like other groups, they prefer a combination of remote work and time in the office.

## Introduction.

**The 6th German Social Collaboration Study provides a meaningful, comprehensive and independent overview of the use of advanced technologies for connected collaboration in the business sector. In this vein, it focuses particularly on organizational aspects such as digital corporate culture, work efficiency and change management. The study has been conducted in the form of an annual survey since 2016, targeting companies in Germany, Austria and Switzerland.**

Employees of many companies have worked from home or “from anywhere” part of the time for years now. The coronavirus pandemic and the current shortage of skilled workers both accelerated this trend, spurring the uptake and use of digital technologies even in organizations that did not previously view working from anywhere as a matter of course.

Secure and smooth hybrid and remote work requires a well-functioning digital workplace. A number of studies have looked at the various forms of remote work performed on this basis with an eye to efficiency. For example, these arrangements mean lower costs associated with office space for companies and shorter commutes for employees. Less systematic study has been devoted so far to whether, and if so to what extent, setting up a digital workplace and hybrid and remote work options constitute a competitive factor for companies. Do these aspects make it easier to recruit or retain new employees and advance innovation, and do they improve the employee experience?

Many companies have recognized the potential of hybrid and remote work, but not all of them are there yet, as statements made by the CEOs of well-known enterprises show. While some of them have ordered staff back to the office, others have announced plans to allow them to work from anywhere going forward. These offers have been greeted with great enthusiasm, both internally and externally, and the companies that have made them have been inundated with applications afterward.

So might the digital workplace and hybrid and remote work become a factor in the global competition for talented workers?

The study distinguishes between employees who mainly work at a computer (information workers) and those whose activities are mainly performed elsewhere, such as in manufacturing and production (frontline workers). It offers insight into worker preferences regarding their preferred modes of work, now and in the future, and how those ways of working affect the employee experience. The study also considers the potential and advancement of the digital workplace, along with key elements of corporate culture and people’s views of the culture of meetings in the business sector. Beyond that, the researchers looked at challenges and obstacles to hybrid and remote work in corporate settings.

The study takes a look ahead to the future in relation to the use of the metaverse, a digital space that melds physical and virtual reality. Although not many companies are actively engaged with the topic of the metaverse so far, participants do take a positive view of the potential it offers, for example when it comes to innovation or improved cooperation with customers and suppliers.

Overall, the German Social Collaboration Study 2023 gives managers and decision makers valuable insights that they are well advised to consider when introducing a digital workplace and implementing hybrid and remote work strategies. Unlike previous social collaboration studies, this year’s study focuses less on individual companies’ levels of maturity and digital collaboration, concentrating more on how solidly employees’ collaboration correlates with their satisfaction on the job and what companies can conclude from this.

# Potential and advancement of the digital workplace.

A crucial competitive factor in the war for talent.

As the shortage of skilled workers intensifies, recruiting new employees and retaining existing ones are becoming more and more important.

The digital workplace has a crucial influence on this. According to the study, the average advancement of the digital workplace stands at 2.82 on a scale from 1 (projects to introduce the digital workplace only play a minor role at present) to 4 (projects to introduce the digital workplace are already mostly complete). This means companies are integrating more and more digital tools and solutions into their processes and structures, or digitalizing them entirely.

## Potential of the digital workplace

Investing in the digital workplace is worthwhile for companies in several ways, as the study finds. The results show a surprisingly strong positive correlation between the status of introduction of the digital workplace and the employee experience.

The digital workplace offers various potential for companies (Fig. 1 and 2). Those surveyed say it promotes cooperation and communication across different team and department lines in particular. It represents a key edge in the competition to bring in new employees and retain existing staff, but that isn't all. The digital workplace also helps promote agility within the company, keep employees better informed and foster dialogue on innovative ideas. This adds up to better, faster decisions on the whole.

This study defines “digital workplace” as a central digital working platform that provides information, tools, and services regardless of physical location.

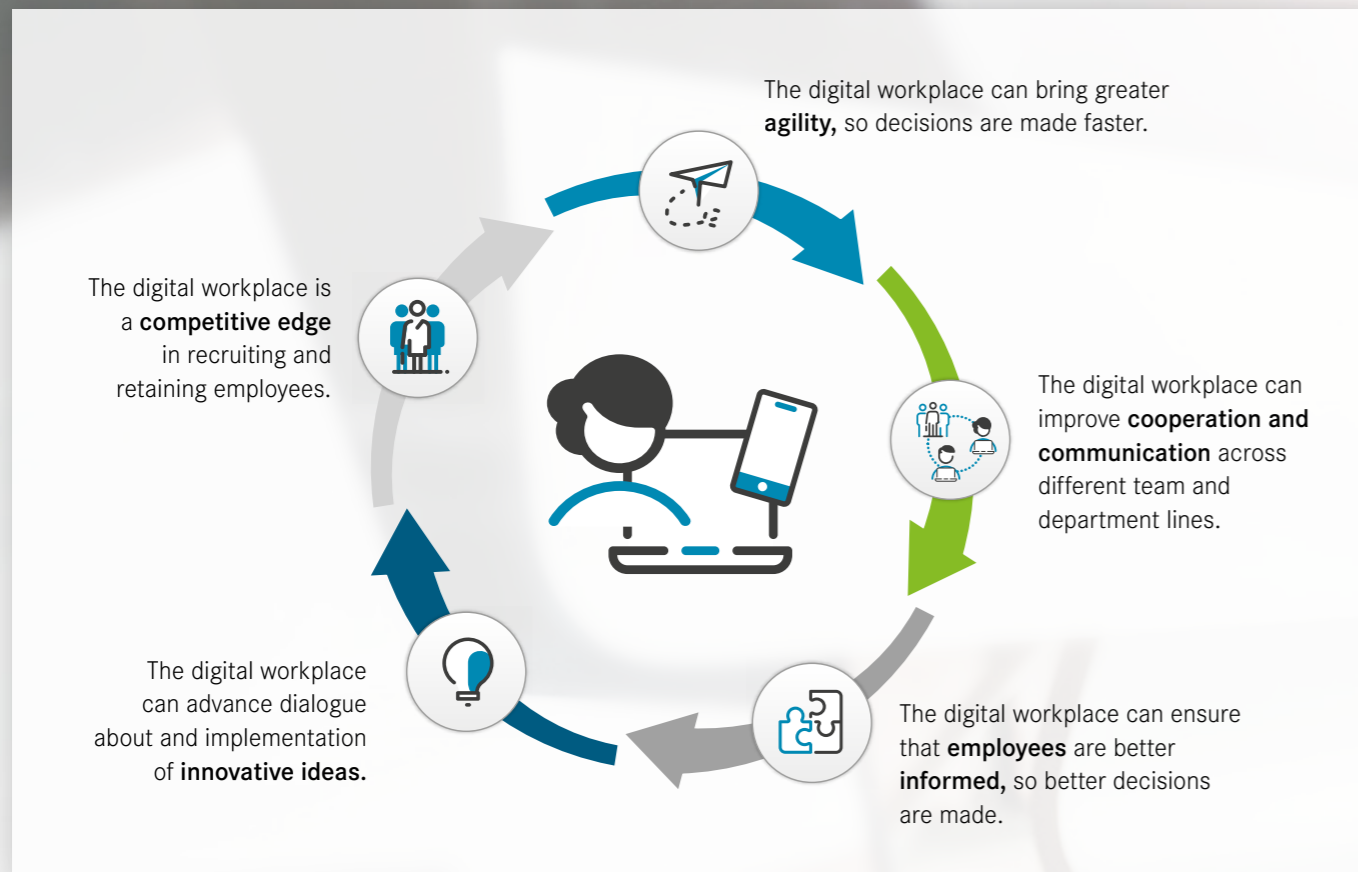


Fig. 1: Potential of the digital workplace

Upper management in particular views this as a significant factor in the highly competitive labor market. Compared to respondents without leadership responsibility, they rate the potential of the digital workplace significantly higher on average.

The results also show an increase in personal well-being among respondents as the digital workplace advances. Those surveyed also believe their colleagues feel more comfortable as a result of the hybrid and remote work options that this opens up. In this way, the digital workplace contributes to a positive employee experience – a key factor in the war for talent.

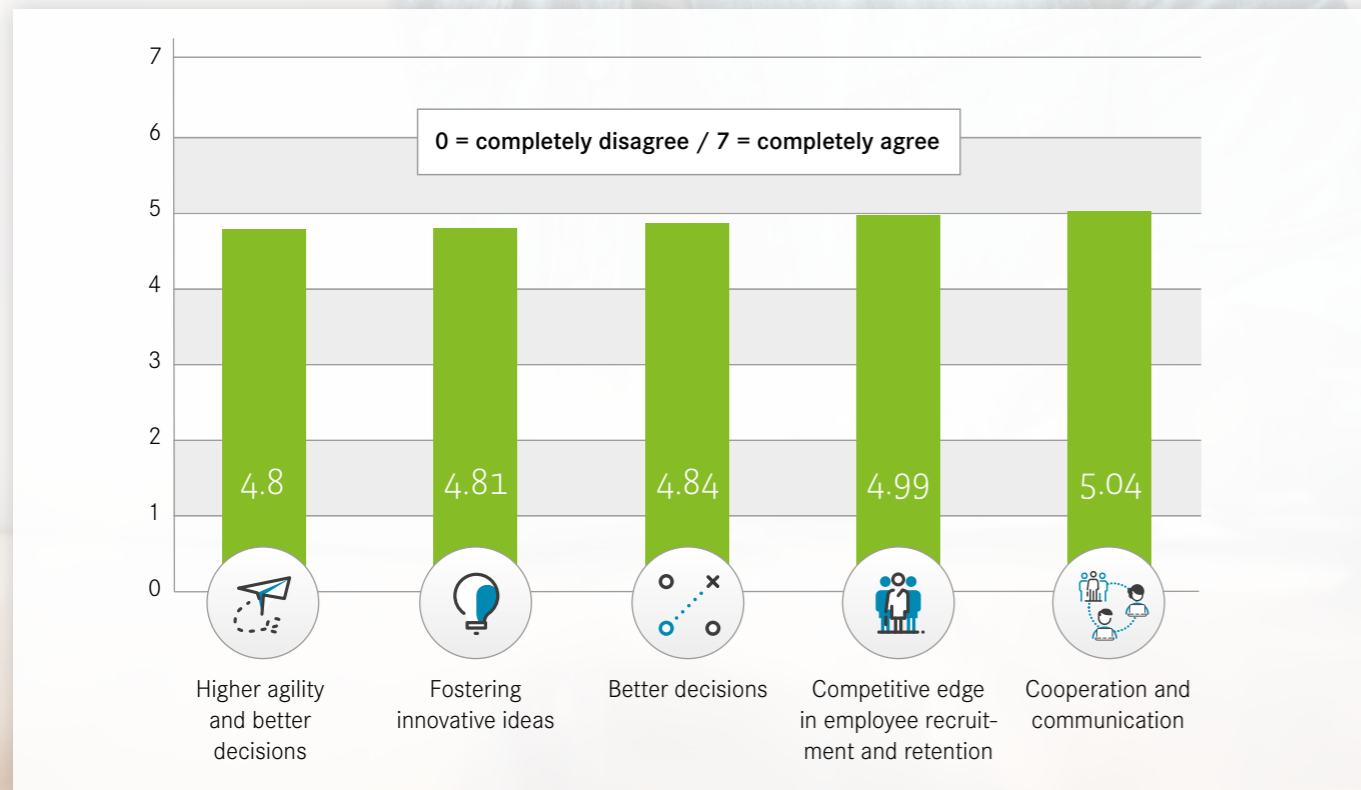


Fig. 2: Assessment of potential of the digital workplace

## Recommended actions/ conclusion

The digitalization of the workplace improves employee experience by increasing efficiency and flexibility as well as facilitating communication. Companies should also increase their focus on hybrid and flexible working models. There are technical and organizational requirements to be met if employees are to work productively from home. This means companies should forge ahead with a comprehensive strategy and the implementation of the digital workplace, for example on the basis of Microsoft Teams. Security aspects are also involved, as information leaves the company's network (for more on this, see the "Security and compliance" section).

What is needed is a holistic digital communication and organization platform that can be controlled intuitively and encompasses all areas of the company. Wraparound solutions like the Microsoft Viva platform, which is specifically designed to foster positive employee experience, should be considered here. To use the digital workplace efficiently, companies can harness Microsoft Viva Learning to enhance their workforce's digital skills. At the same time, managers should receive further training with an eye to the digital workplace and New Work. In combination with advanced corporate structures and comprehensive change management, relationships and perceptions of well-being can be strengthened on all sides.

Introducing a digital workplace (DWP) is a necessity for modern companies to remain competitive in the long term. Where digital workplaces have already been implemented, they require ongoing refinement, evolution and improvement to live up to their full potential. It is important to actively involve employees in shaping the digital workplace right from the start in order to take their needs into account and create a positive employee experience.

- **Focus on cooperation and communication:** Use of collaboration tools such as Slack and Microsoft Teams promotes cooperation and communication across different team and department lines. A holistic collaboration platform such as Microsoft 365 can help achieve this.
- **Ensuring security and compliance:** Employees need to be able to trust that current rules and regulations on data

protection are being observed and care is being taken to ensure adequate security. Tools from large providers like Microsoft can ensure that this is the case.

- **Fostering agility:** A digital workplace fosters agility. This means companies should make certain their employees have access to new technologies so they can respond swiftly to change.
- **Keeping people better informed:** A digital workplace helps companies keep their employees better informed. This includes providing relevant information via readily accessible internal networks or innovative AI-based solutions such as Microsoft Viva Topics.
- **Sharing innovative ideas:** The digital workplace gives employees easier access to innovative ideas and best practices. Digital idea platforms and solutions for sharing information, such as Microsoft Viva Engage, can help with this.
- **Leveraging competitive advantages:** Companies should zero in on the digital workplace as a competitive edge in recruiting new employees and retaining existing ones. Flexible working models and remote work options are a key factor in the war for talent these days.
- **Pursuing a holistic DWP strategy:** To ensure that companies and employees can derive optimum benefits from the digital workplace, a holistic individual strategy should be developed and put in place. This clarifies what the organization aims to achieve and when, and what the path to get there will be like, ensuring efficient and focused execution.
- **Training and continuing education:** People need skills if they are to use the digital workplace effectively and successfully. Appropriate training and continuing education options should be offered for employees. This includes various formats targeting the use of tools and programs and fostering digital skills, which can be provided through Microsoft Viva Learning, for example.
- **Adoption and change management:** Employees and their needs should be taken into account right from the start in introducing and implementing the digital workplace. This improves acceptance, and ultimately the use of the digital workplace.

## Advancement of the digital workplace

Establishing a digital workplace is a key prerequisite for successfully implementing hybrid and remote work. Many software tools, such as Microsoft Teams, Microsoft OneDrive and Microsoft Viva, are available to make this a reality. One in three survey respondents indicates that projects to introduce the digital workplace at the company are already mostly complete (Fig. 3). By contrast, 17.6% of participants indicate that these kinds of projects only play a minor role at present.

When it comes to the advancement of the digital workplace, the communications, automotive and IT industries are the leaders (Fig. 4). More than 50% of survey respondents in these sectors state that projects to introduce the digital workplace at the are already mostly complete. Healthcare, the public sector and the travel industry lag behind by comparison.

In terms of size, smaller companies (up to 500 employees) perform especially well. Some 73.3% of those asked indicate that projects to introduce the digital workplace are mostly complete. By contrast, that is true of only 25.9% of medium to large companies (501–5,000 employees) and 40% of very large firms (more than 5,000 employees).

### Recommended actions/ conclusion

The introduction of a digital workplace is already complete or at least in the planning stages at many companies. Smaller companies in particular remain farther ahead than medium and large ones. Even so, nearly one in five indicates that digitalization projects only play a minor role at present. There is an urgent need to catch up in this area.

When introducing a digital workplace large company in particular should ensure that employees are involved and benefit accordingly. To do this, they need a clear digital

workplace strategy and adoption and change management policies so all steps can be taken on target, securely and with lasting impact.

Cross-industry differences show that companies that do not yet have projects aimed at introducing a digital workplace in place need to work on this topic now or risk being left behind. Industry-specific challenges and needs require consideration here. However, even companies that already have a digital workplace should review it regularly and adjust it where necessary to ensure that they are meeting employees' changing needs optimally and benefiting from advances in technology.

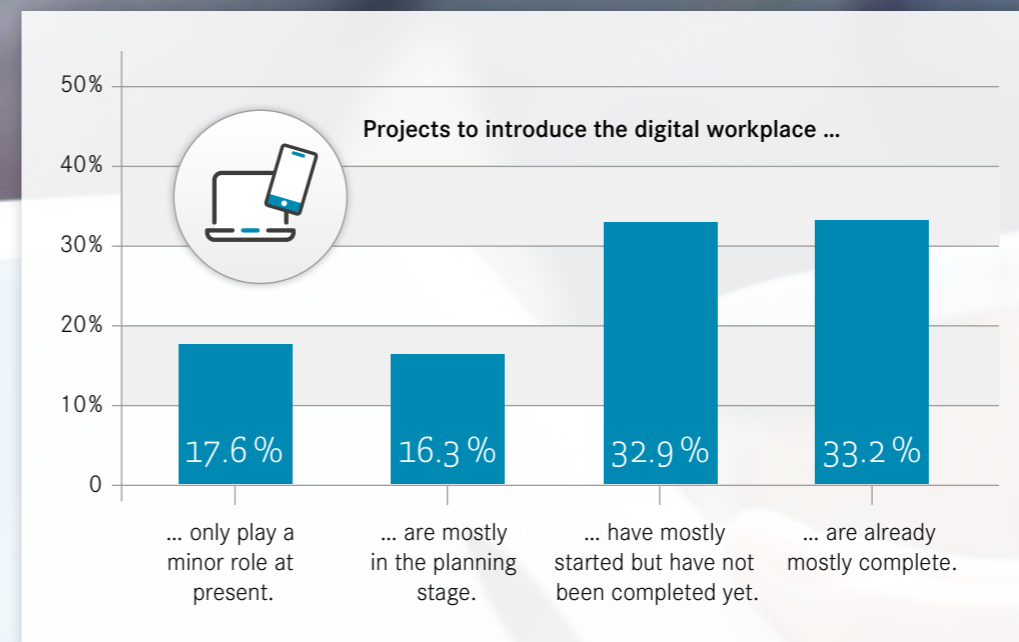


Fig. 3: Advancement in the introduction of the digital workplace

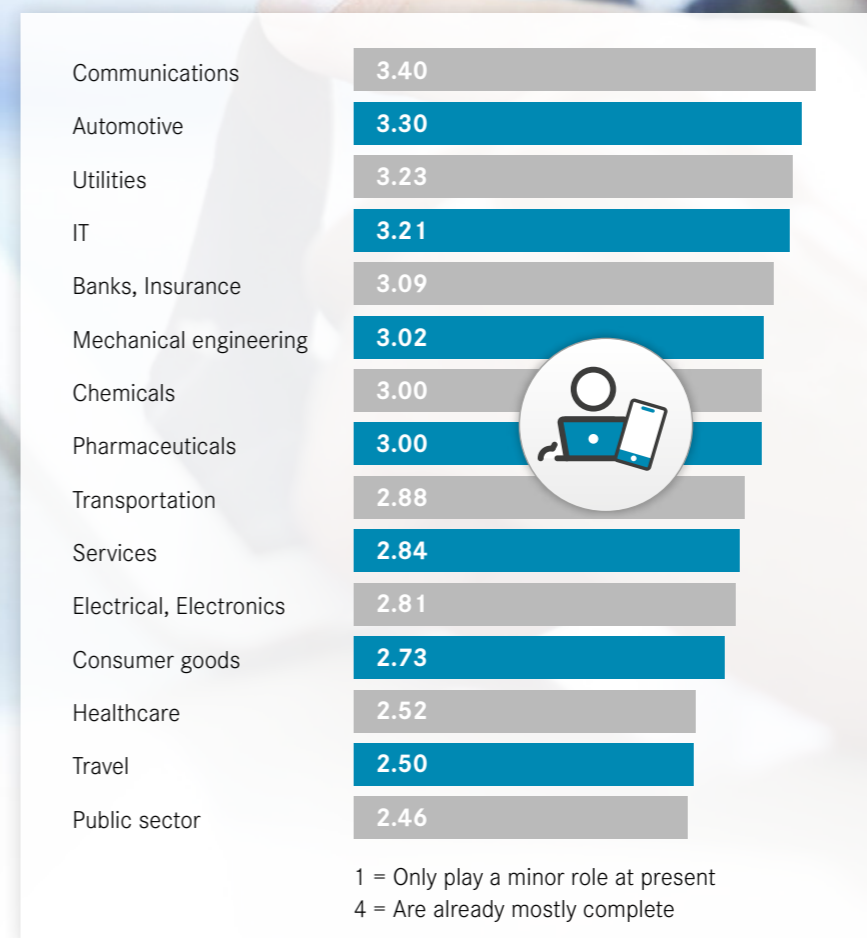


Fig. 4: Average advancement of digital workplace projects by industry

# Employee experience and corporate culture.

Hybrid work enhances satisfaction – and with it, loyalty.



Fig. 5. Employee experience

Efforts to implement a digital workplace often focus on technology: infrastructure, hardware, and smart solutions. It is all too easy for companies to lose sight of what is actually the crucial factor: people. Employees and their individual characteristics and overarching needs should be front and center in any decision a company makes, especially on digitalization measures. Ultimately, they are the basis for the company and its success. All this means that positive employee experience is the prime objective, which companies should bear in mind at all times in providing the digital workplace.

The study measured employee experience based on six factors: personal growth, trust, cooperation, loyalty, well-being, motivation and vision (Fig. 5.). The person is at the heart of all these considerations.

The **employee experience** represents the interaction of all experiences employees have as part of their work at a company. This ranges from the very first touch-point, such as applying for a job, up to when a person leaves the company for good. Interactions are an important part of the experience, along with impressions and feelings. By this, the employee experience becomes a key aspect of employees' satisfaction and motivation.



Only some of the participants in the study rate their employee experience, and the associated satisfaction with their employer, as good (Fig. 6). They do feel a sense of belonging at their company and state that they are loyal, but there is still room for improvement. They also perceive their cooperation with other employees to be good. However, they are less satisfied with work-life balance and their sense of well-being. Continuing education and personal growth measures also receive only moderate marks. Even fewer employees believe the goals at their company are in service of a vision, and they do not feel particularly motivated, either, as a result. Trust in the decision-making abilities of managers and the company ranks lowest of all. Employees without leadership responsibilities also have a much less positive employee experience on the whole than managers.

### Digital workplace improves employee experience

However, there is a clear correlation between increasing advancement of the digital workplace and positive assessment of the employee experience, with all the various aspects involved (see Fig. 7). Employee experience is fundamentally better where the digital workplace is more mature.

Employees' loyalty to a company is largely independent of where they physically do their work. 73.7% of those who work on a hybrid or fully remote basis say they feel a sense of belonging at their company. Respondents who work entirely (66.4%) or mainly (75.7%) in the office have comparable levels of loyalty.

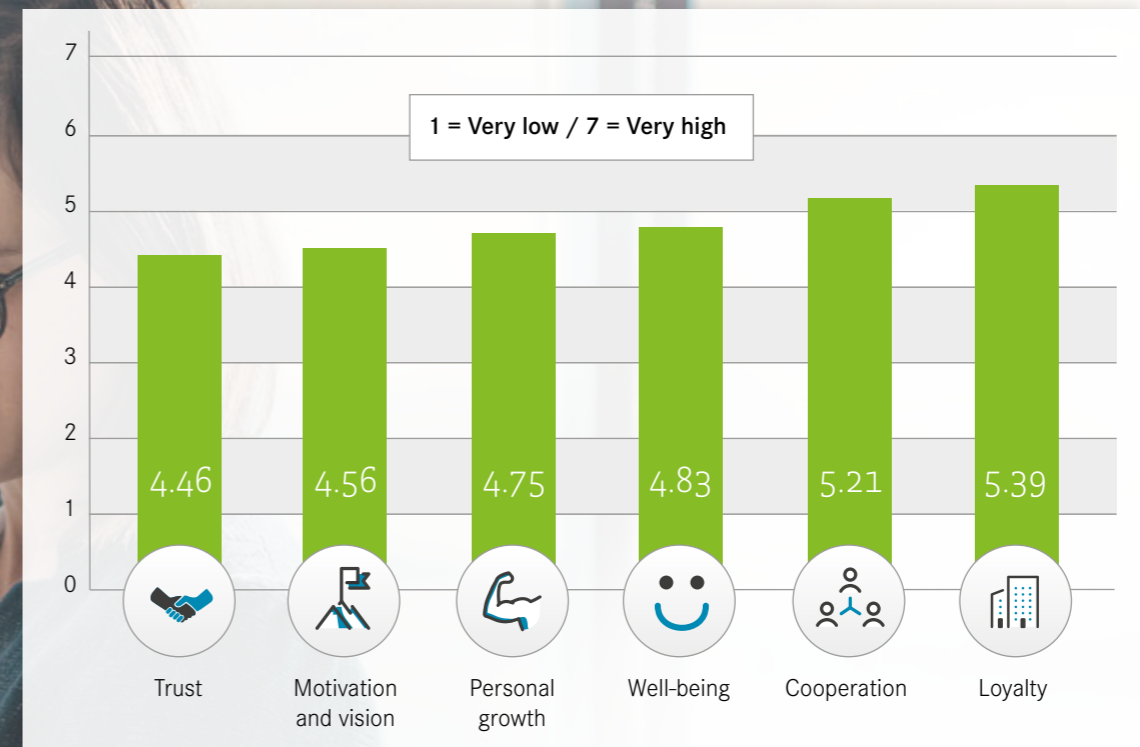


Fig. 6: Analysis of employee experience

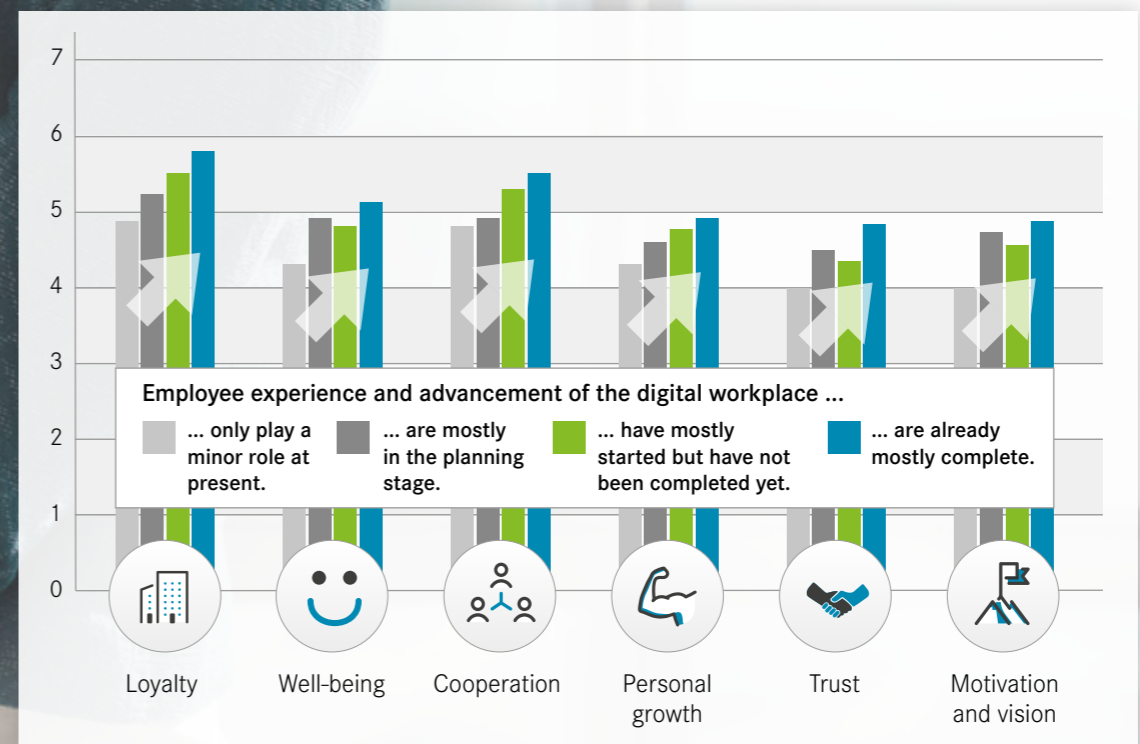


Fig. 7: Assessment of employee experience with increasing advancement of the digital workplace

However, the employee experience depends on more than just technical equipment and amenities. It also depends on corporate culture. Participants indicate that all six of the elements of corporate culture evaluated as part of the study (Fig. 8) are relevant to enhancing a company's appeal as an employer (Fig. 9). It became especially clear here that respondents most value transparent communication and a wide range of continuing and professional education opportunities. Another factor viewed as

particularly relevant is how well managers lead by example in embracing guidelines and strategies. However, trust in managers' ability to make decisions was given the lowest ratings overall on this point in comparison to other satisfaction factors when participants were asked about their current employer. In general, these six factors garner higher importance ratings from managers than they do from employees without leadership responsibility.

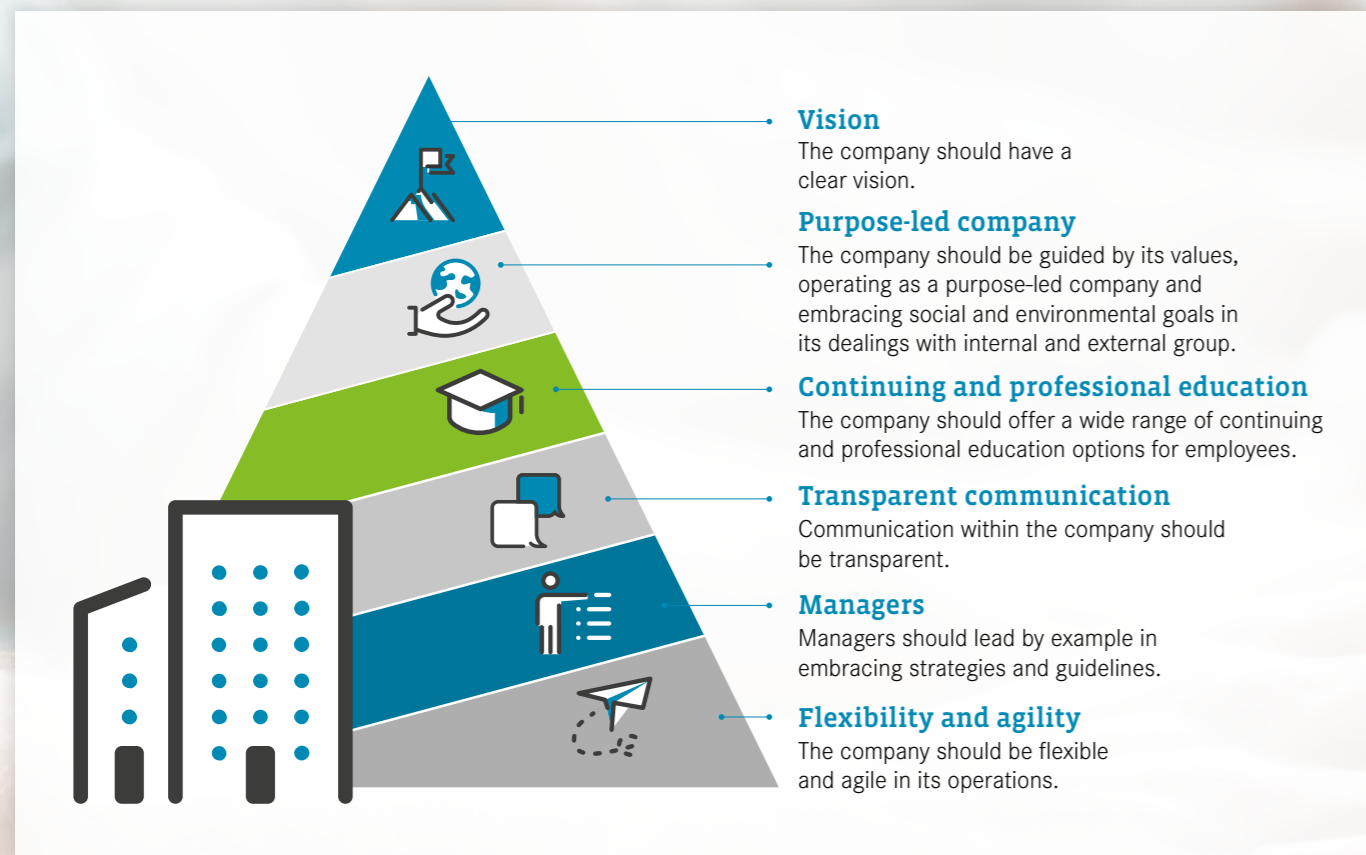


Fig. 8: Six elements of corporate culture

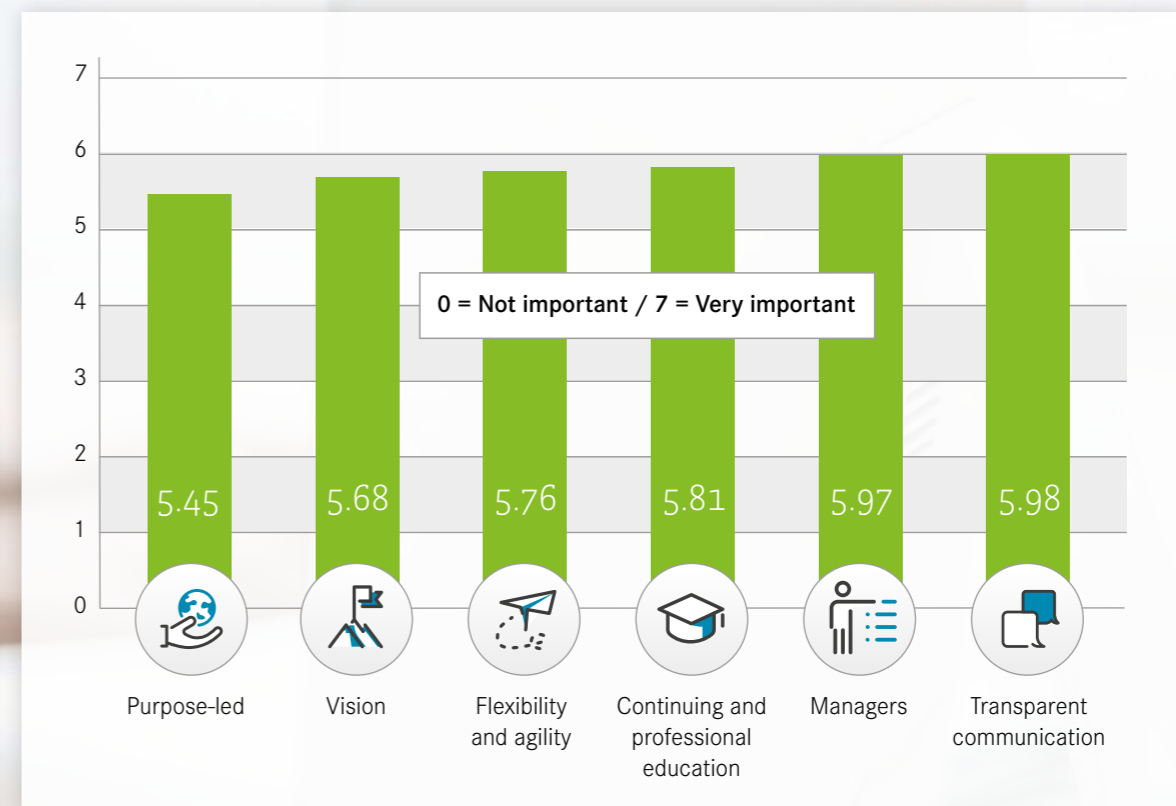


Fig. 9: Relevance of elements of corporate culture

While the dimensions of corporate culture are rated extremely important by survey respondents, there is still a gap between perception and reality at most companies. Values for the current situation at companies are significantly lower than the figures for relevance, for example.

### Gap between desires and reality

The responses relating to the individual dimensions highlight this gap between desires and reality. As one example, the average (5.98) for promotion of transparent communication within the company is significantly higher than satisfaction with the current status (4.46) (Fig. 10). Where there is not yet a digital workplace in place, satisfaction with current communication within the company is lowest as well (3.97). Communication, and the trust based on it, is a fundamental human need, however. An advanced employee experience platform equipped with a module designed for this purpose can help in this area.

On the topic of personal growth, the difference between the desire for a wide range of continuing and professional education options (5.81) and the feeling of actually moving forward (4.76) is also clear (Fig. 11). Values increase in step with the maturity of the digital workplace, from 4.35 (minor role) to 4.97 (mostly complete). This indicates that a digital workplace with an advanced employee experience platform can bring clear improvement in employees' personal development and satisfaction with continuing and professional education options.

Respondents also indicate that it is critical to have a clearly formulated corporate vision with a clear purpose and goals derived from it. The desire for a company to be guided by values and to stand for social and environmental goals is rated 5.45. Respondents' ratings on this point average just 4.56, by contrast (Fig. 12). The figures also increase along with the maturity of the digital workplace.

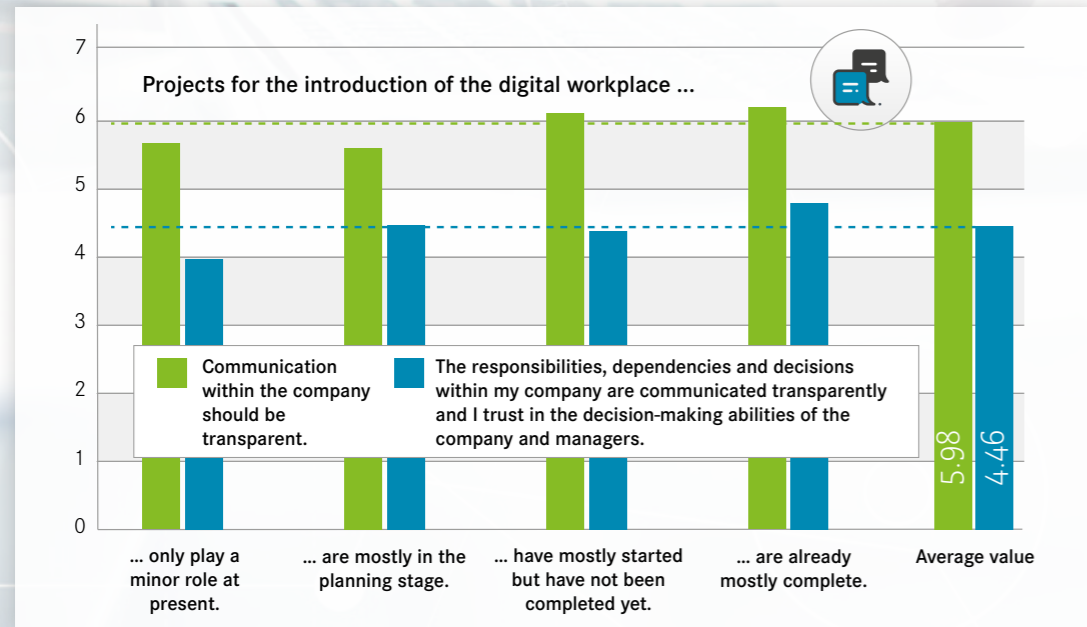


Fig. 10: Correlation advancement of the digital workplace and communication

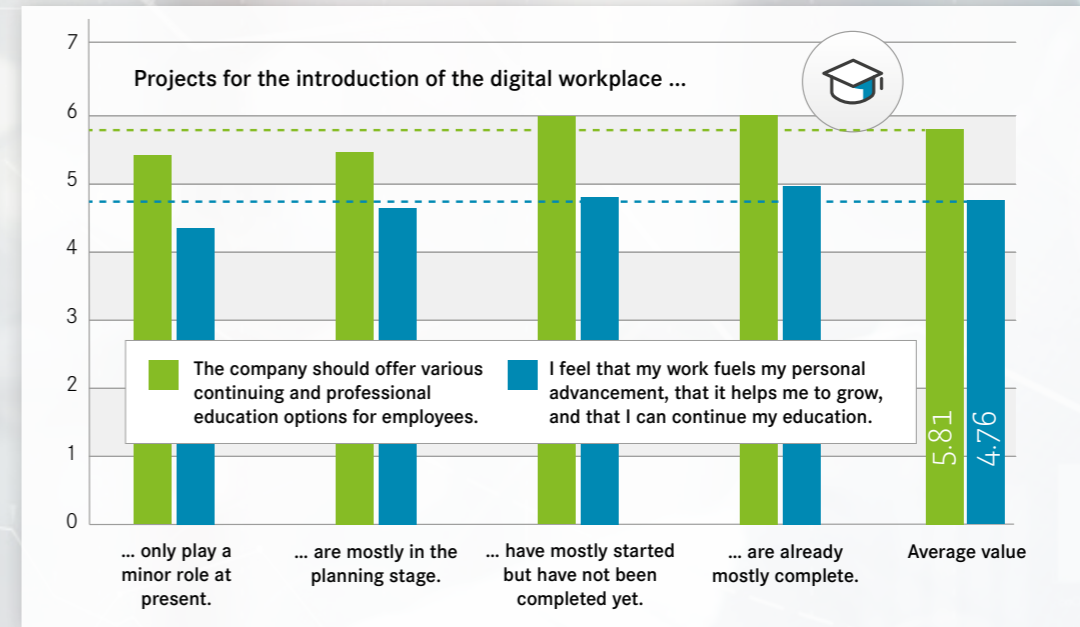


Fig. 11: Correlation advancement of the digital workplace and learning

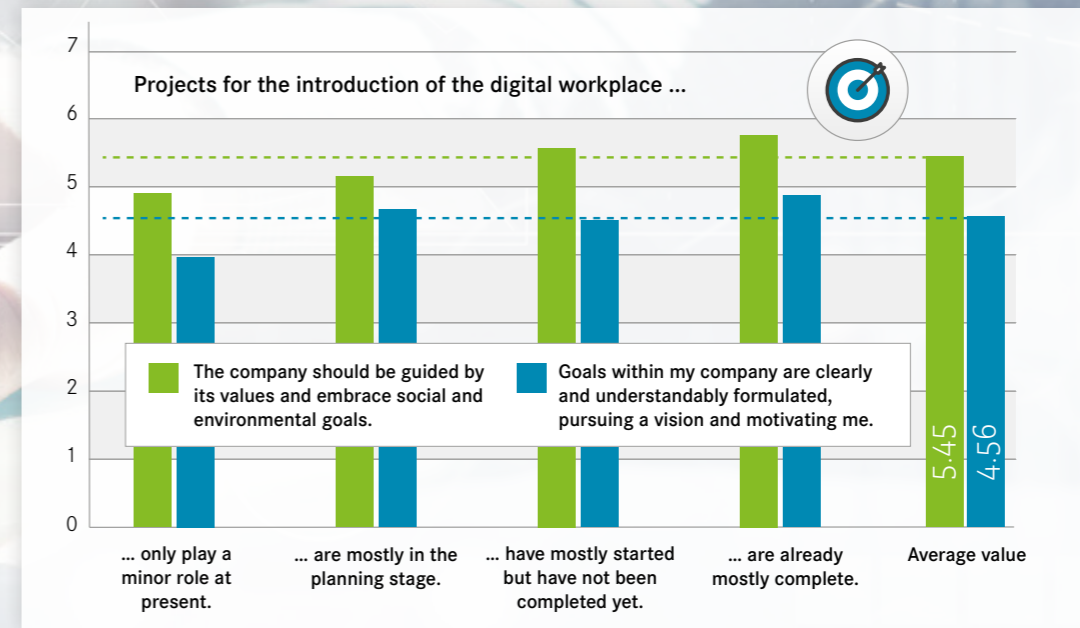


Fig. 12: Correlation advancement of the digital workplace and goals

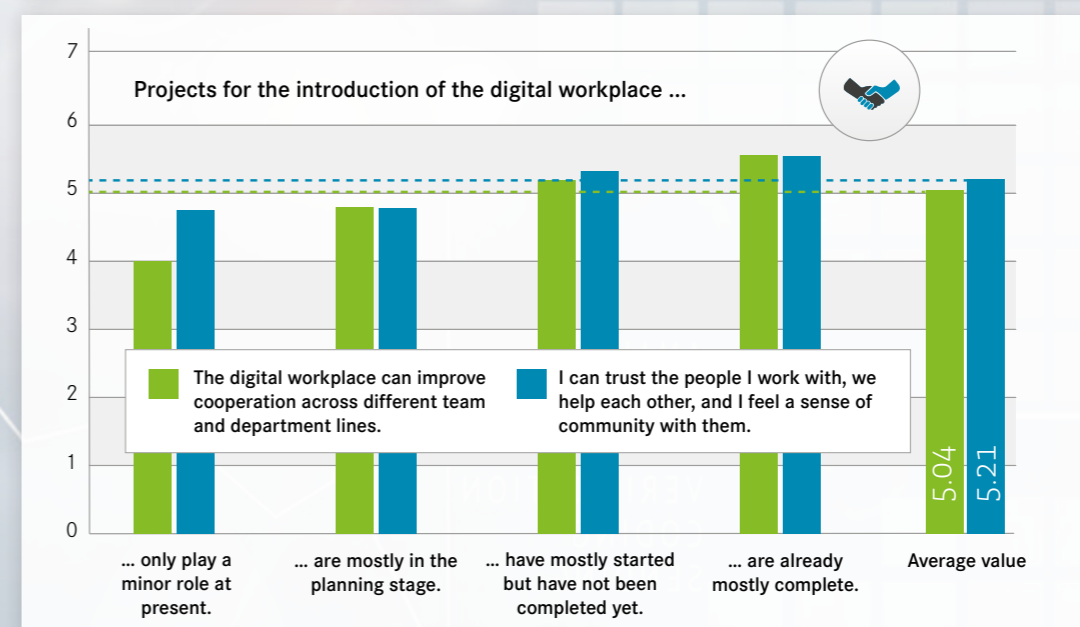


Fig. 13: Correlation advancement of the digital workplace and cooperation

## Digital workplace promotes overarching cooperation

The gap in terms of cross-team and interdepartmental cooperation has largely been closed, by contrast – at least if the digital workplace has largely been introduced. Trust in colleagues increases in step with the maturity of the digital workplace (Fig. 13), from 4.75 to 5.55.

On the whole, this indicates that when a digital workplace is introduced, overarching cooperation is already largely achieved. There is still a gap between desires and reality in all other areas.

## Recommended actions/ conclusion

The challenges relating to employee experience lie less in providing the right technology, including security and infrastructure (see the “Security and compliance” section) and more in the human factor. For example, the social aspects of successful collaboration and communication within the team must be taken into account – with the people at the heart of the change process. This is because comprehensive adoption and change management can help to promote acceptance and close the gap for full satisfaction. Focusing solely on technological solutions and fully remote work can leave people lacking in direct interpersonal interactions, but people need each other in order to be creative and innovative, to grow, and to feel comfortable and connected. This means companies need to put the focus back on people. They have to identify and meet fundamental human needs in order to balance the digital workplace and employee experience with loyalty to the company in the long term.

Alongside internal cooperation within and across individual teams, it is also important to foster open and transparent communication within the company. Managers should share information about company strategies, goals, and successes with employees regularly to build trust. Applications such as Microsoft Viva Engage, which offer all employees at the company access to communities and conversations, make it possible to build a new form of leadership communication.

This study shows that there is room for improvement in terms of trust in the decision-making abilities of both managers and the company as a whole and employees’ motivation and vision. One tool for doing this is OKR (objectives and key results), a management method that breaks down the company’s goals to the level of specific units, teams and individuals. This makes it possible for individual employees to know not only what they are doing, but also why. Microsoft Viva Goals and Viva Engage can provide significant

support here. And this in turn enhances employee satisfaction and loyalty.

Microsoft Viva, an employee experience platform, can help to improve all these aspects. This applies to communication, cooperation, trust and continuing and professional education alike. In this way, Microsoft Viva Learning facilitates employees’ personal growth and development. Employees should have access to a broad array of training and continuing education options to grow and deepen their skills and abilities while also opening doors to development opportunities that they can pursue. It is important for companies to provide a broad range of internal and external training activities and programs to achieve this.

### Modern corporate culture fosters trust and integrity

Companies should furthermore offer training for managers, since simply providing a technological platform is not the solution in itself. This allows them to hone their skills in management, communication and decision making. It is crucial for managers to live up to their responsibility as role models and decision makers within the company and understand the importance of a positive corporate culture. They should lead by example, embracing the company’s strategy and guidelines to set the tone. Managers foster a culture of trust and integrity by showing that they themselves follow the rules.

Companies should view the elements of a positive corporate culture – communication, continuing and professional education, sharing of goals and transparency regarding people’s own contributions – as a key factor in the competition to retain and recruit employees and act accordingly on these points. After all, a strong corporate culture can help make the company more attractive to potential employees. This yields key advantages in the current war for talent. On top of that, satisfied employees are more productive, as a [study](#) published by the University of Oxford shows.

# Frontline workers and the digital workplace.

Digitalization brings advantages for frontline workers, too.

Average advancement of the digital workplace stands at 2.45 on a scale from 1 to 4 among frontline workers. This means measures such as digital tools and solutions to simplify and add flexibility to people's activities are increasingly becoming established at companies. Progress on this point has been somewhat slower in the case of frontline workers than information workers (2.95). Even so, frontline workers also benefit from a digital workplace.

Like with information workers, the employee experience of frontline workers also improves on average as the digital workplace advances (Fig. 14) – even though they do less computer work. This shows that the mere existence of a digital workplace produces greater satisfaction with the employer even where there are few touchpoints. Well-being in particular is significantly enhanced: frontline workers feel a greater sense of equilibrium with respect to their work and have better work-life balance if the company has already introduced and completed extensive digitalization measures. Trust in management decisions and frontline workers' motivation and vision also increase along with the advancement of the digital workplace.

A frontline worker mainly works not at a computer, but on a machine on the production floor, in logistics or on the sales floor, for example. This situation means these workers are also less likely to reap the benefits of hybrid or remote work.

It is also apparent that transparent corporate communication is especially important to frontline workers in enhancing a company's appeal as an employer. Managers leading by example in embracing the company's strategies and guidelines is another crucial factor. More than 86% of the frontline workers surveyed agreed that both are very important elements of any corporate culture. On the whole, frontline workers rate all six of the dimensions covered by the survey as relevant on average on a scale from 1 to 7 (Fig. 15).

## Recommended actions/ conclusion

Digitalization is just as important to frontline workers as it is to information workers. Companies need to take their employees who do not work exclusively at a computer into account along with others. Measures aimed at introducing a digital workplace improve the employee experience and enhance satisfaction with the employer for frontline workers as well, from solutions for transparent communication to

guidance from managers. Open and transparent communication helps foster greater identification with the company among frontline workers, along with deeper engagement. Ongoing access to the company's intranet and knowledge bases and to collaboration tools for working with other departments help to increase productivity and cohesion in this group of employees, as with others. Frontline workers also need training and continuing education, just like information workers, if they are to have the skills to work efficiently with the new solutions.

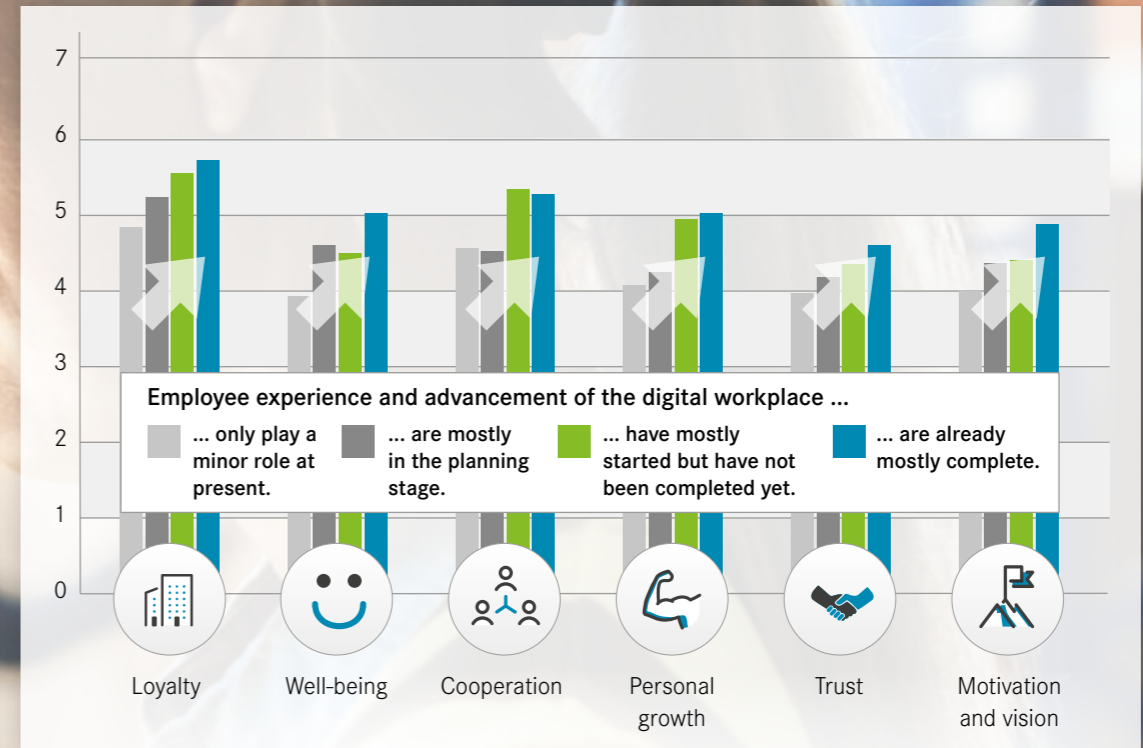


Fig. 14: Employee experience among frontline workers after the introduction of the digital workplace

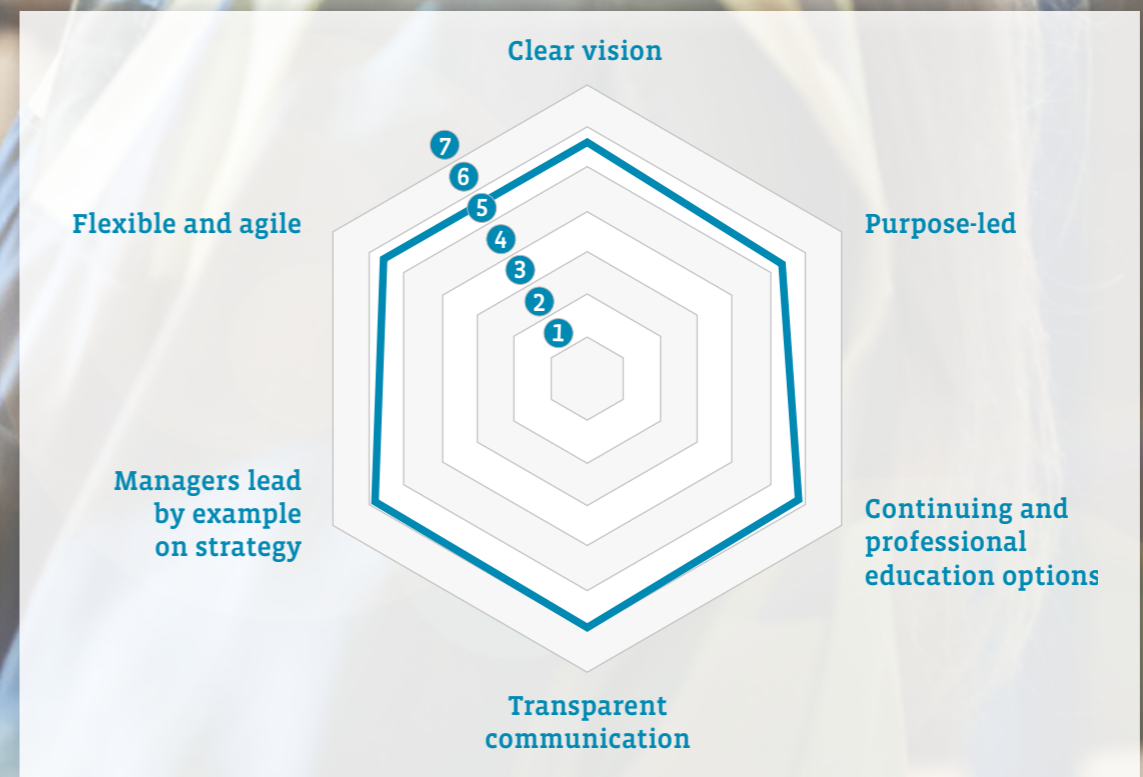


Fig. 15: Relevance of elements of corporate culture

# Hybrid work – strategies and experiences.

A range of crucial advantages for employees of all ages.

During the coronavirus pandemic, many companies made great strides in digitalizing the workplace and increasing flexibility. This is reflected first and foremost in the ability to work remotely from anywhere – from home or on a train, for example. Recently, though, more and more employees have been returning to the office. In short, hybrid working has become established.

**Hybrid work** is a combination of in-person work done in the office and work performed anywhere else (remotely). Various arrangements and distributions are possible with hybrid work; employees might work mainly remotely or mainly in the office, for example.

## Hybrid

Employees work in the office part of the time.



## Remote

Employees work exclusively outside the office.



## In the office

Employees work in the office all of the time.

This section deals only with the results for information workers; the previous section looks at those for frontline workers. Most respondents who work mainly at a computer prefer hybrid work (spending about half their time in the office and the other half working remotely). Just 7% of those surveyed would prefer to work entirely in the office (Fig. 16). Smooth, secure hybrid and remote work requires that a digital workplace be set up. The introduction of the digital workplace was more advanced on average among participating information workers who already work on a hybrid basis or remotely.

Preferences are clearly shifting away from traditional in-person work in the office. On the other hand, only 16% of information workers want to work exclusively remotely. Social interaction in the office remains a key factor, and that largely holds true across gender and age groups. From Generation Z to baby boomers, needs for flexibility seem to be similar.

Some 33.4% of those surveyed indicated that expectations that they will be reachable had increased somewhat. By contrast, 36.3% have not noticed any impact at present, and 8.2% even say hybrid and remote work have reduced expectations surrounding reachability. Interestingly, actual workload has hardly changed at all on average: 39.9% of respondents perceive no difference, while 24.4% see an increase in actual workload and

13.7% perceive the workload to have decreased as a result of hybrid and remote work.

Hybrid and remote work has enhanced personal well-being for 59% of participants. Groups ranging in age from 22 to 44 years feel this effect especially keenly. Some 69.2% even indicate that other employees feel it as well. Still, the positive influence of hybrid and remote work on employee well-being declines with increasing respondent age.

### Cutting costs, conserving resources – balancing work and family life

Another positive effect is that participants believe digitalization and shifting the location of their work can help cut costs and conserve resources (such as electricity, paper, and water). The study finds an especially strong link among managers on this point. In addition, 76.3% of respondents say hybrid and remote work has made it significantly easier to balance work and family. All of these benefits explain why more than half of those asked (64%) view hybrid and remote work as an important competitive edge on the labor market when it comes to retaining or recruiting good employees. Upper management is especially likely to agree with this (Fig. 17).

A cross-industry comparison shows that on a scale from 1 (no competitive advantage) to 7 (very strong competitive advantage), participants from the IT industry (5.51), banks and insurance companies (5.44), and utilities (5.32) are most likely to see a key competitive advantage here. These are companies that have already actively and successfully implemented numerous digitalization measures and for which hybrid work brings advantages that outweigh any added work and expense. In terms of change strategies, these industries are often one step ahead of others. By contrast, the healthcare sector, which is based on physical processes (such as caring for patients and providing medical treatments), is more undecided on this point (4.29). Even so, this industry also benefits from suitable digitalization measures and should take advantage of relevant change options.

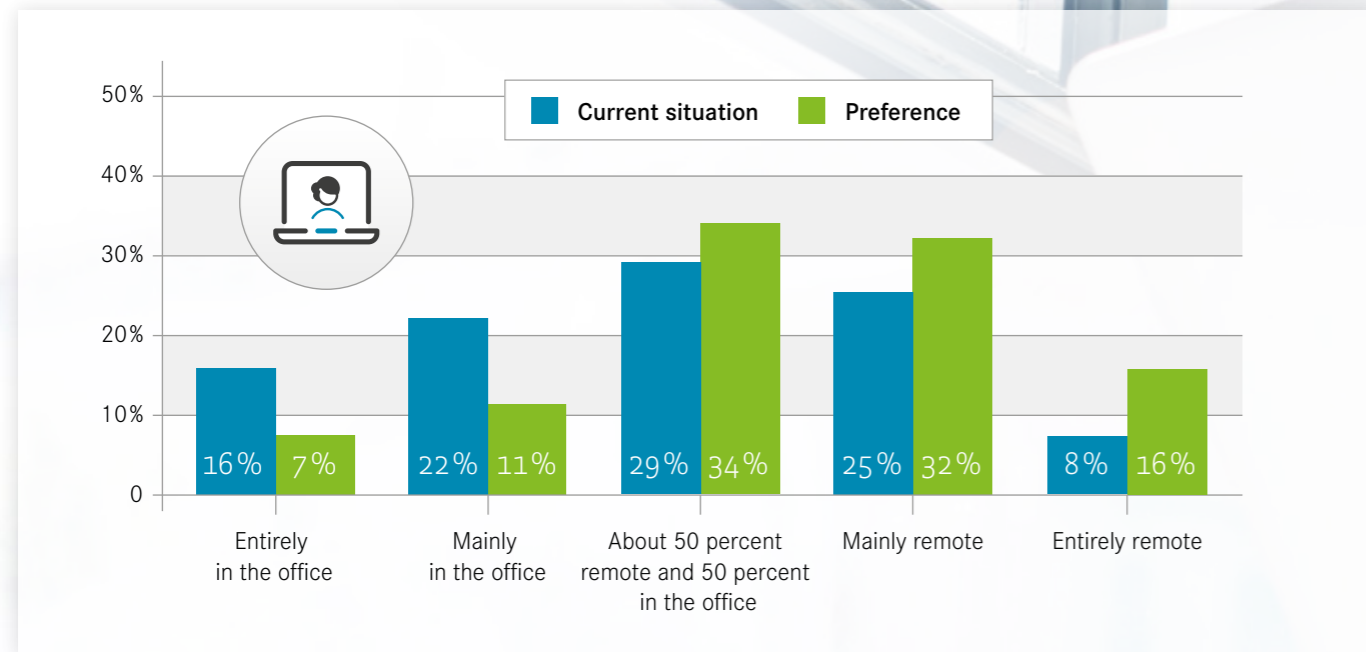


Fig. 16: Hybrid work among information workers

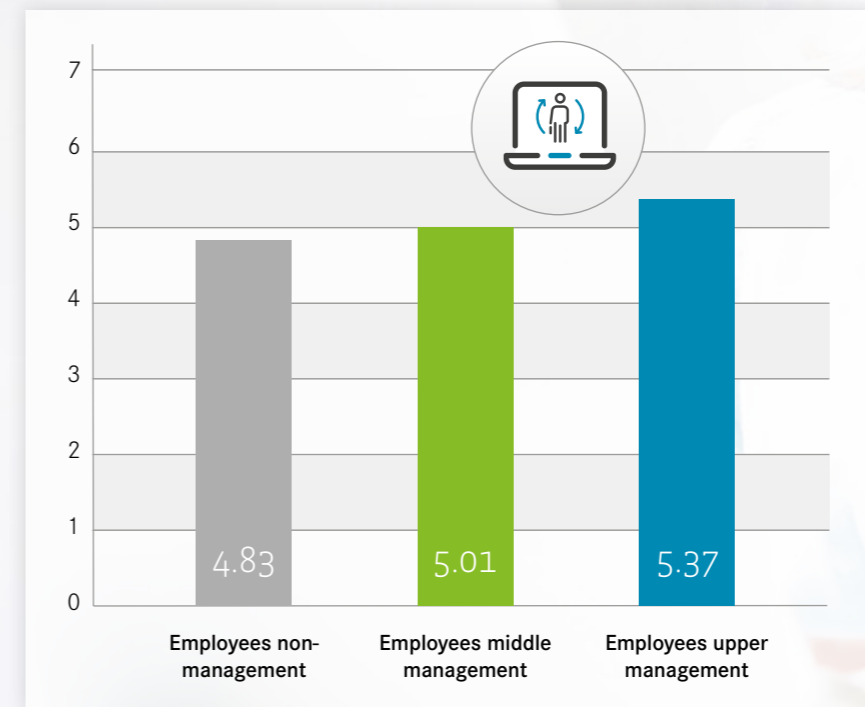


Fig. 17: Competitive advantage stemming from hybrid and remote work

### Some activities must be performed on-site

Ability to innovate has increased as a result of hybrid and remote work, say some 40.3% of those surveyed. However, participants also indicate that some activities, tasks, and processes must be done in person and on-site. Table 1 highlights the intrinsic difficulty of engaging in interpersonal interactions such as personal discussions or quick, informal exchanges between colleagues in hybrid or remote models. Active tasks such as repairing machinery and conducting lab experiments also have to be performed on-site.

Respondents also mentioned continuing and professional education in this context, with a large portion reporting that workshops and team-building activities are difficult to carry out on a hybrid or remote basis. Another point is interaction with customers and partners, and in healthcare with patients. Especially with an eye to customer loyalty, a large portion of survey participants say in-person contact is significantly more valuable than virtual meetings. When it comes to medical care, direct personal contact is essential.

The quality of hybrid and remote work depends on the reliability of the IT infrastructure, the efficiency of meetings that are held, and the digital workplace, with all of its physical and procedural circumstances. The study finds that the ability to innovate within companies as a result of hybrid and remote work increases significantly with the maturity of the digital workplace.

### Quality of hybrid work correlates with well-functioning digital workplace

On average, respondents rate the quality of hybrid and remote work as high, at 4.90 (on a scale from 1 = Very low to 7 = Very high). Quality is highest in the communication, IT, and pharmaceuticals industries (Fig. 18). The results also show that the quality of hybrid and remote work increases the more developed the digital workplace is. Some 80% of respondents who stated that processes for introducing the digital workplace were already largely complete also see hybrid work as being high in quality on average.

Internal matters (no direct customer contact)				External matters (with direct customer contact)	
Employee meetings	Meetings and social contact	Job-related tasks	Continuing and professional education	Customer contacts	Working directly with people
<ul style="list-style-type: none"> <li>Disciplinary meetings</li> <li>Conflict resolution discussions</li> <li>Job interviews</li> </ul>	<ul style="list-style-type: none"> <li>Informal dialogue</li> <li>Dialogue (quick, spontaneous) among colleagues</li> </ul>	<ul style="list-style-type: none"> <li>Work, machine repairs and maintenance, IT infrastructure</li> <li>Acceptance of products, e.g., sampling, prototypes</li> <li>Research, e.g., lab experiments</li> <li>Manufacturing and production</li> <li>Manual, trade-related activities</li> </ul>	<ul style="list-style-type: none"> <li>Workshops</li> <li>Teambuilding</li> <li>Brainstorming</li> <li>Initial training for new employees</li> </ul>	<ul style="list-style-type: none"> <li>Advising</li> <li>Customer loyalty</li> </ul>	<ul style="list-style-type: none"> <li>Not at all possible in some cases, e.g., nursing, childcare</li> <li>Difficult to impossible in some cases, e.g., medical consultation</li> </ul>

Table 1: Activities and processes that are difficult to carry out remotely

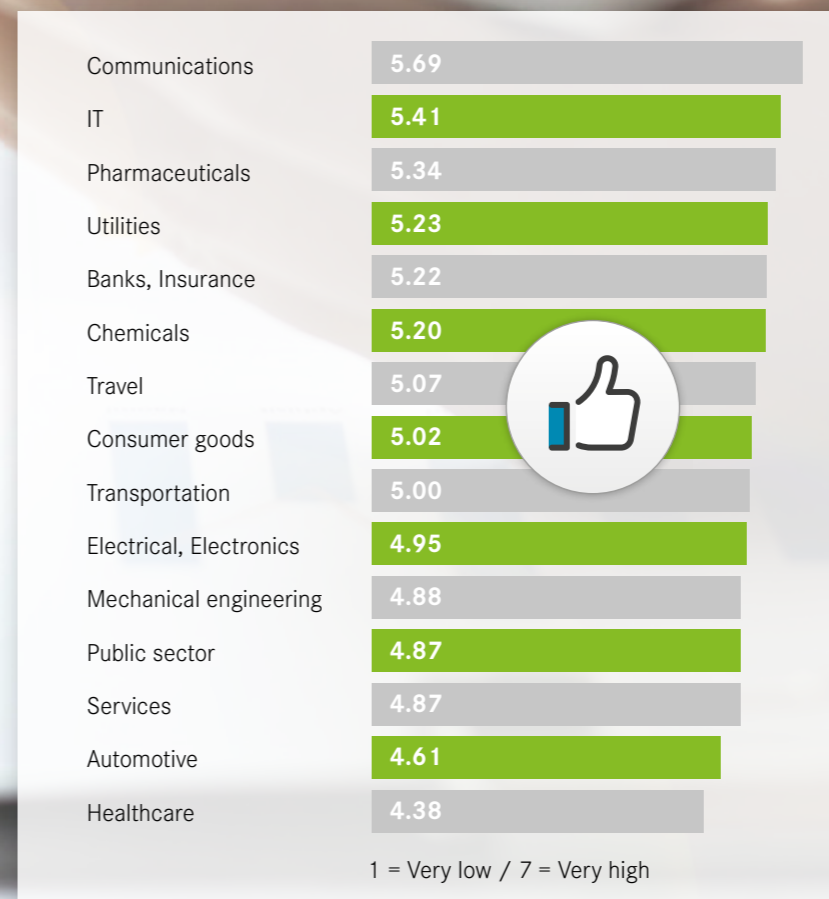


Fig. 18: Quality of hybrid work by industry



## Recommended actions/ conclusion

Results show how important it is to address employees' individual needs and allow for flexible work models. Hybrid work can be a good solution for accommodating desires for greater flexibility and autonomy across groups, from Generation Z to baby boomers. At the same time, companies need to support the introduction of digital workplaces to make it easier – or even possible in the first place – to shift to hybrid and remote work.

### Fostering personal interaction for team cohesion

Personal interaction in the office is highly important to most employees. Companies should take this into account and give their staff the opportunity to work in the office as well. There are options for interpersonal interaction for those working remotely, though, such as regular virtual team meetings or a virtual coffee break.

Companies should note that some activities, tasks, and processes must be done in person and on-site. They need to review this in detail with an eye to their employees' needs. Alternative formats can be tested for workshops and team-

building activities, with support from digital tools and platforms. Companies should also make sure certain remote work does not lead to a loss of customer loyalty. Depending on the situation, personal contact can additionally be established through virtual meetings or video calls. In the case of activities that require in-person contact on site such as those involved in medical treatment and patient care, the local work environment should continue to be geared toward those factors. However, hybrid or remote solutions can also work in some cases, such as with telemedicine.

Hybrid and remote work offer companies various advantages, such as cost cutting and conservation of resources. Employees benefit from greater ease in balancing work and family life and from improved well-being. Although [Microsoft's Work Trend Index](#) shows that the number of meetings is on the rise and employees also have to be reachable during longer hours, the actual workload has barely changed at all. This reinforces the conclusion that hybrid and remote work can become a crucial competitive advantage if introduced the right way. Managers in particular should strive to use this competitive advantage on the labor market to retain and recruit talented employees. Companies should also take industry requirements into account and see where advantages might arise on this point.

# Meeting culture for hybrid work.

Striking a fair balance between remote, in-person, and hybrid.

In-person meetings at companies increasingly went digital as part of the response to the coronavirus pandemic. Workshops and even multi-day conferences are being held entirely online to harness the benefits of being able to participate from anywhere. This also makes it possible to arrange meetings with employees from other organizational units and with customers and partners from different countries, with less lead time required.

The results of the study show that overall, companies have a well-organized meeting culture, both online and in-person (Fig. 19). There is an awareness of the topics for which meetings should be organized and in what time frame they should be held. Care is also taken to include people who work remotely. These people are actively involved in meetings, with appropriate tools being used to link them in virtually.

The survey also shows that in-person meetings will continue to play a major role going forward, even as digitalization continues to advance. This too reflects the desire for a hybrid working style at companies, not just remote work. The only place where participants tend to expect in-person meetings to decline is at the international level.

## Recommended actions/ conclusion

The meeting culture at companies is well organized and balanced between online and in-person meetings. All formats are used sensibly and fairly. Employees outside the office are actively included in meetings. This indicates that companies are taking their employees' needs into account. It is important to define clear goals and topics for meetings and ensure that they keep to a certain length and that enough breaks are scheduled to prevent meeting fatigue. Digital tools like Microsoft Teams can help with this, along with proper technical equipment, such as comfortable headsets with noise cancellation.

Depending on the situation, companies have to weigh the pros and cons of meeting in-person versus online. Online meetings might be a good option for international teams, for example, in order to cut travel time and costs. This also contributes to companies' sustainability goals. However, it is equally important for companies to foster in-person dialogue and interpersonal relationships by continuing to make in-person meetings possible – especially at the local level. They should also ensure appropriate interaction and cooperation as equals for participants outside the office, even in the case of hybrid meetings.

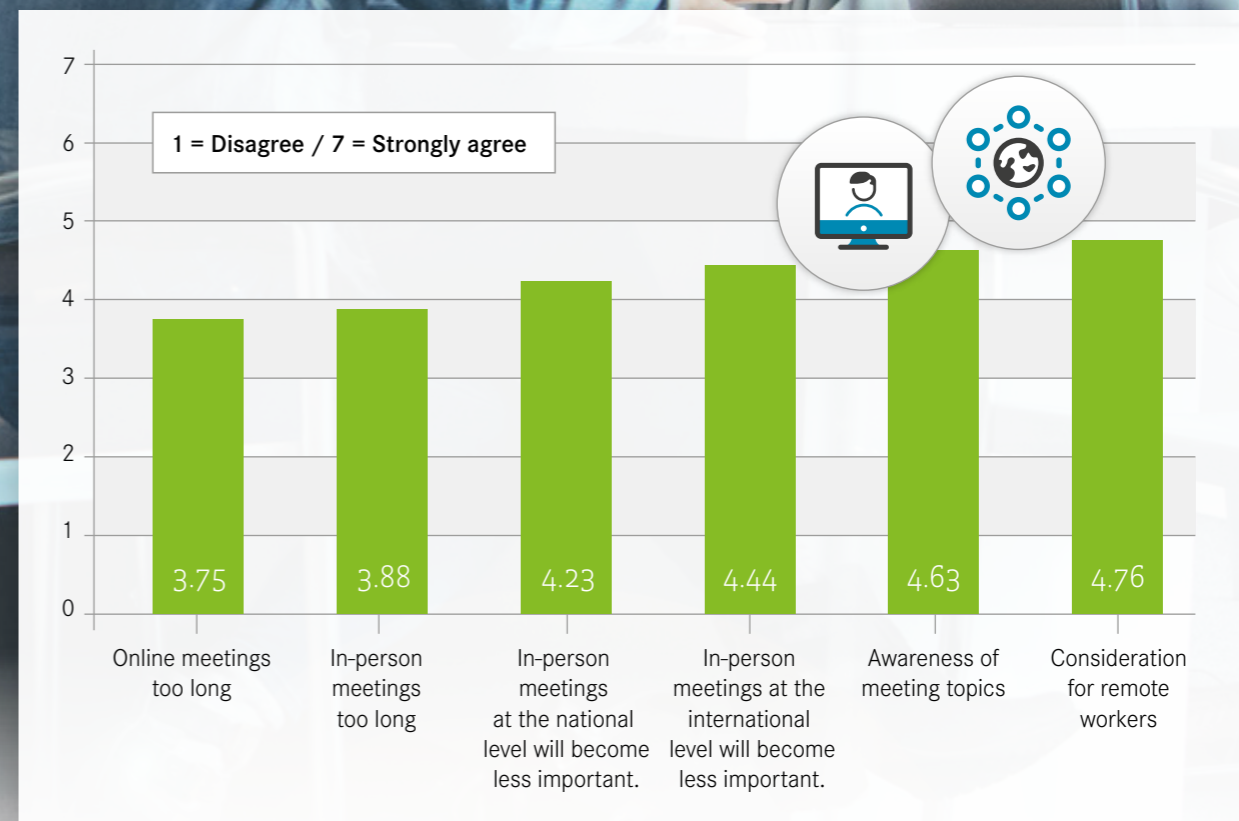


Fig. 19: Meeting culture at companies

# Security & compliance.

IT security and data protection are the biggest obstacles.

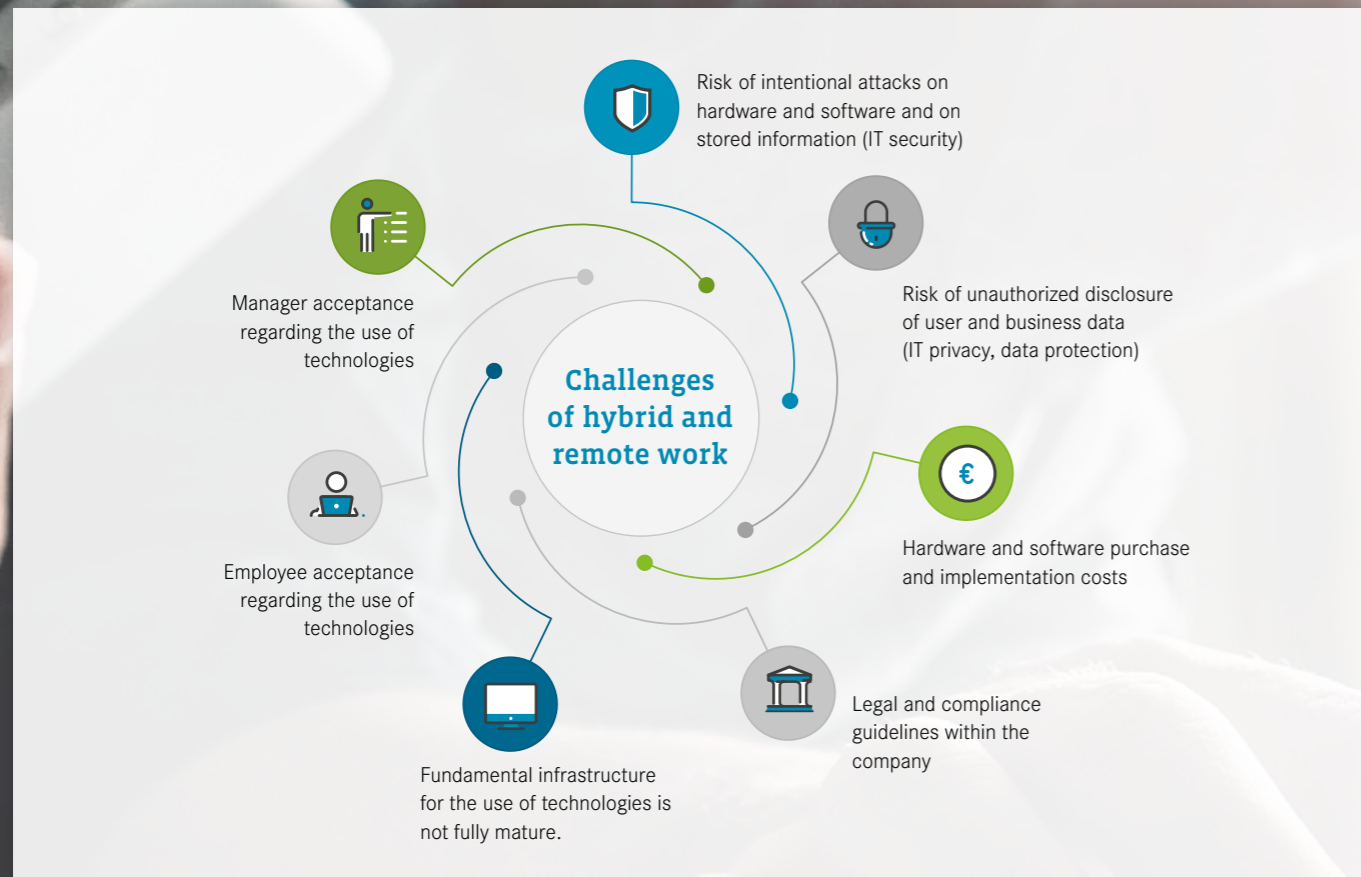


Fig. 20: Challenges relating to hybrid and remote work at companies

Alongside the potential of the digital workplace, the study also considers the challenges associated with introducing it. After all, projects to introduce the digital workplace only play a minor role at present at nearly one in five companies. Why is that? The main obstacles that emerge here are stringent security requirements and compliance guidelines.

Providers of software and services for the digital workplace have spent recent years hard at work on increasing IT security (preventing and defending against intentional attacks on hardware, software, and data stocks) and ensuring data protection (protection against unauthorized disclosure of user and business data). Still, these very topics continue to stand in the way of further progress. In the study, participants rate seven challenges (Fig. 20) affecting hybrid and remote work and reach the conclusion shown below (Fig. 21).

IT security and data protection currently represent the biggest challenges for respondents when it comes to implementing hybrid and remote work at companies. But legal guidelines and compliance topics are also mentioned as obstacles. The automotive, pharmaceuticals, and utilities sectors see these as issues in particular, while companies in the communication and travel industries are less critical of these aspects. In principle, the communication sector sees these topics as posing the fewest challenges to the establishment of hybrid and remote work. Germany's digital infrastructure ranks only near the middle of the pack among the countries in Europe, as the European Commission's Digital Economy and Society Index 2022 found. However, participants in this study view this as one of the least significant challenges. Still, the results also show that respondents do view the German digital infrastructure as more problematic as their level of leadership responsibility increases.

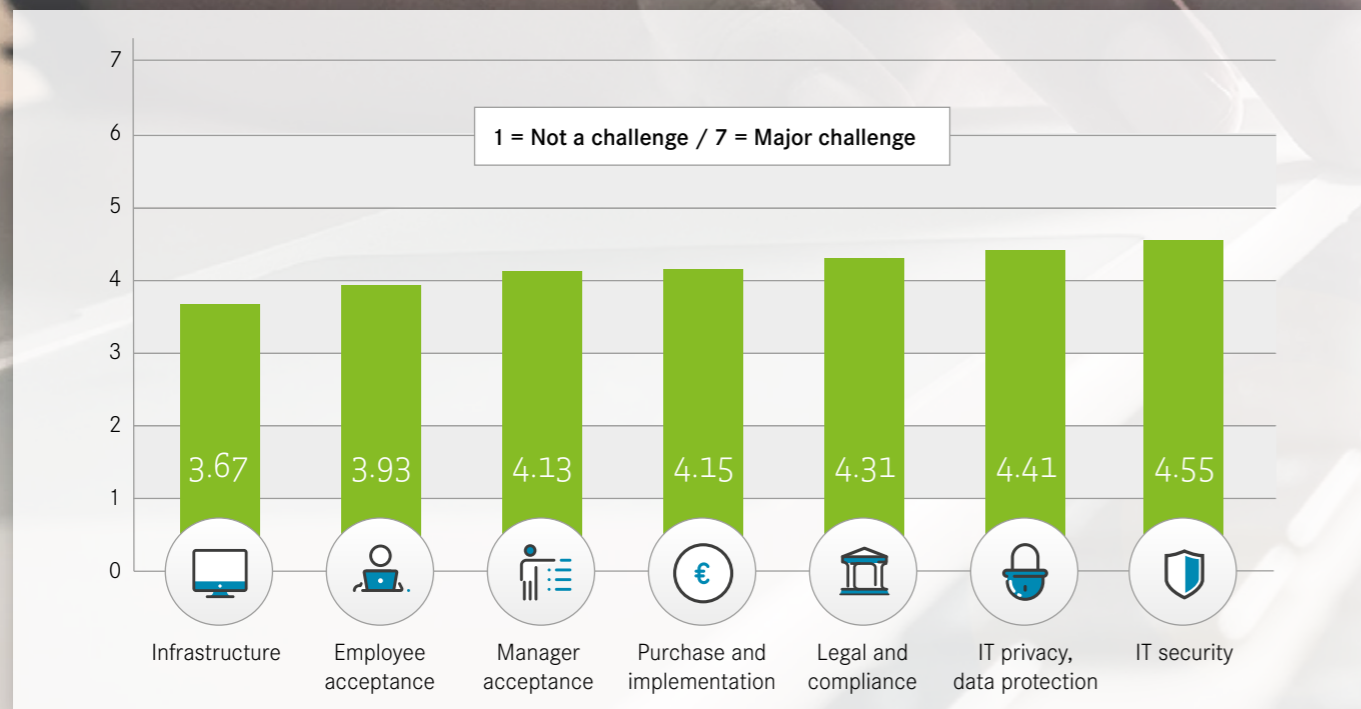


Fig. 21: Challenges for hybrid and remote work

## Recommended actions/ conclusion

Companies should identify the risks relevant to them and devise suitable strategies to make implementing hybrid and remote work a success in spite of the challenges involved. Regular training and awareness programs for employees can help explain the challenges associated with hybrid and remote work, such as IT security and data protection, along with legal topics.

In today's digital world, cybercriminals are among the biggest threats to companies of all sizes, across all industries. Attacks often have far-reaching financial ramifications, and they can also cause lasting damage to a brand's reputation. This means cybersecurity measures are a must. Adoption and change management can help with this, ensuring security and keeping information safe. All this is based on a stable technological infrastructure. Especially but not exclusively for companies that do not have an IT team of their own, external partners can provide valuable services in terms of advising, planning, full implementation, and operations.

# The metaverse.

A look ahead to the future.

The metaverse has been a hot-button topic for a while now, and certainly since Facebook's October 2021 rebranding as Meta. The metaverse is a digital space that melds physical and virtual reality. A company's employees can use avatars to meet virtually instead of joining a Teams call.

Many consulting firms and futurologists believe the metaverse will open up new opportunities, including a 3D workplace for things like design work, large-scale virtual events, concerts, new forms of interaction, strengthening of brands through virtual dressing rooms, and much more. A June 2022 McKinsey study predicts that the metaverse will be worth 5 billion dollars by 2030.

However, participants in this study take a more sober view of the topic. The metaverse does not rank very high in the considerations of the companies surveyed. Only 2.5% are already using it. A whopping 70% and more do not believe the metaverse is important at all right now.

Still, participants do see overall potential for their companies (Fig. 22). They believe the metaverse will be most likely to help with developing innovations. Strikingly, respondents tend to believe the metaverse will play a more important role at the company the farther up the leadership scale they sit. This correlation also holds for positive views of the opportunities that the metaverse may offer. These results show that members of the upper management in particular tend to believe the metaverse can contribute to the development of innovations.

## Recommended actions/ conclusion

Although the spread of the metaverse is still in its infancy, it may become important for companies to adjust to it as well as to other new technologies. However, there is a balance to be struck here between lagging behind and completely ignoring current trends. A company's own strategy can help

identify the right way to deal with new developments. Companies should review and identify the potential opportunities for them to stay one step ahead of the competition. It is especially important for members of the upper management to take up new topics and identify opportunities for their company early on. This means companies can get started with raising awareness of the metaverse among their employees now where there is a need.



Fig. 22: Potential of the metaverse

## Summary and outlook.

**Higher satisfaction for all employees, more loyalty to the company, numerous advantages for hybrid work, and thus a crucial edge in the stiff competition on the labor market – these are the key advantages of a digital workplace. The 6th German Social Collaboration Study looked at how the digitalization of the workplace affects the employee experience and what connections there are between a digital workplace and the form in which employees work (in the office, hybrid, or remote). The study deals with potential and challenges for companies, managers, and employees in the case of hybrid and remote work.**

Introducing a digital workplace and hybrid and remote work are becoming important competitive advantages for companies, as the study results definitely show. Efficiency gains such as elimination of business travel and commuting are not the main considerations, even though they do represent clear advantages. Rather, new digital technologies enhance a company's appeal on the labor market – a crucial factor in light of the current shortage of skilled workers and war for talent.

The study clearly shows that employees want to move away from traditional models of working in the office and toward work-from-anywhere arrangements. They prefer a combination of the two, and that preference holds true across all age groups, from Generation Z to baby boomers. Companies should leverage this insight in their efforts to recruit new employees and retain existing ones. There are multiple reasons it is worthwhile to accommodate the need for greater flexibility, both for managers and for employees without leadership responsibilities.

### Optimum digital workplace brings positive employee experience

The results show a strong correlation between the status of introduction of the digital workplace and positive employee experience among those surveyed. This applies to information workers and frontline workers alike. Advantages include enhanced loyalty and motivation among employees thanks to transparent communication of the company's vision and goals. Improved well-being, optimized work-life balance, and greater opportunity for personal growth are also possible.

This gives rise to a wealth of new opportunities for employers and employees alike, which they should seize going forward. Various studies, such as the [Future Organization Report](#), have already shown that content employees are far more productive. And productivity is a key success factor for companies in any industry. All this means it is worthwhile to leverage these factors and put employees front and center as processes of digital transformation take shape. They need to be brought on board right from the start. Their needs must be taken into account, and training and continuing education must be offered to them so they can grow with the newly introduced technologies within the company.

At the same time, IT security should be a central consideration right from the start when new technologies are introduced. By the time companies are ready to engage with this urgent topic, it can be very helpful to seek support from external specialists

who can provide valuable assistance with analysis, planning, implementation, continuing education, and operation – or even consult on the potential opportunities opened up by uncharted territory like the metaverse.

The results also show that there is hardly any difference across generations. In the world of digital work, people of all ages seem to think much more similarly than is often assumed. This means it is important to find the right mix of on-site and remote work, establish hybrid processes, and make sure everyone is included. Hybrid and remote work are no longer just a trend. Both models have become integral parts of the way we work today. For most industries and business units, the digital workplace will continue to be a key competitive factor now and into the future.

# Study participants.

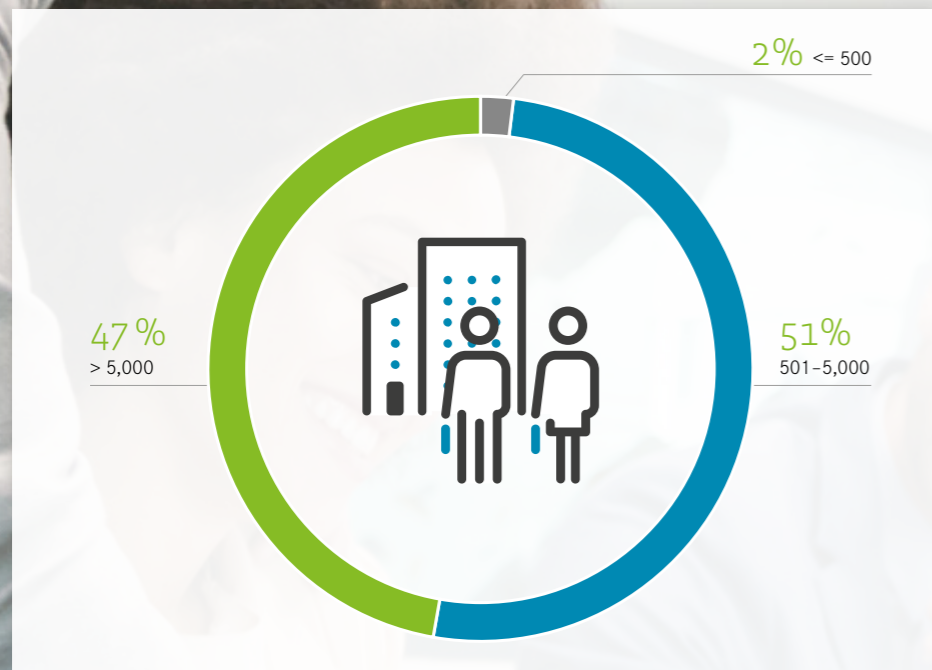


Fig. 23: Participants by company size

As in past years, numerous employees from various companies, industries, and hierarchies participated in the German Social Collaboration Study 2023.

This year's study marked the third time that frontline workers were surveyed as well (26.1%). Most of them are in direct contact with customers or work in production and manufacturing. Of those surveyed, 41.7% were female, 57.8% male, and 0.5% another gender identification. The age distribution was balanced.

Most of the participants work at larger medium-sized companies, large companies and groups of companies (Fig. 23). Information workers, who mainly work in offices, account for 73.9% of those surveyed. Overall, the respondents are distributed among different industries and fields of activity (Fig. 24 and 25). To ensure high-quality results, different criteria were used to select the data sets for analysis, such as questions to test participants' attention and thus guarantee high-quality responses.



Fig. 24: Participants by field of activity

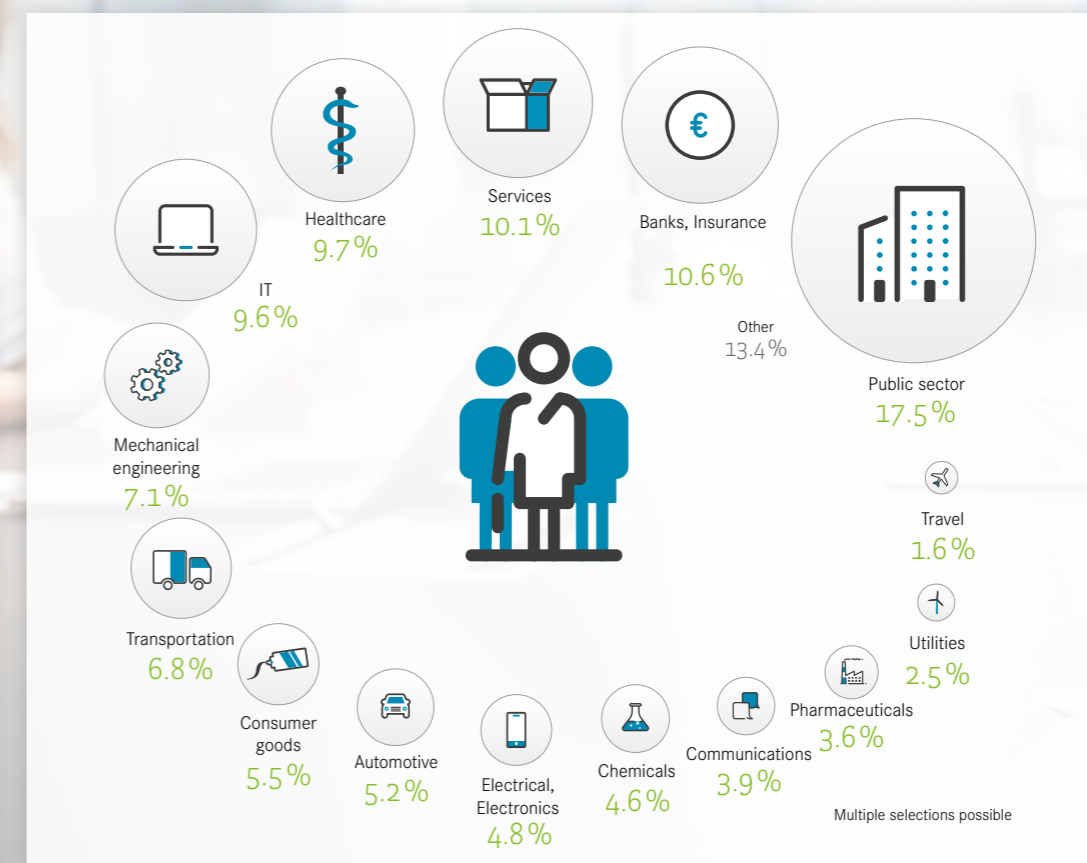


Fig. 25: Participants by industry



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