

A perfect storm

The role of 4G in the 'age of me'

THE PERSPECTIVE SERIES

New insights into the UK workplace



Foreword



Jeroen Hoencamp,
Enterprise Director, Vodafone UK

At Vodafone we've seen a huge change in customer mobile usage. It's been widely recognised across the industry that traditional mobile voice calls are declining and mobile internet use is on the increase. Our very own Head of Network, Santiago Tenorio, looks at this evolution later in this report. This will of course continue to ramp up as the nation's thirst for information, new technology and expectations grow exponentially.

We've also seen dramatic changes within our workplace, as our own employees are accessing the latest smartphones, tablets and applications at home; they expect that same functionality in the office. Not only that, but we've radically altered the way that we work so that our focus is not on where you work, or what time you log on and off each day, but on maximising productivity, efficiency and employee satisfaction by working flexibly. At the end of last year we'd saved more than £40 million by making these changes. Employees are hot-desking and finding themselves with 20% more time within the working day; carbon emissions have been reduced by 40% due to less commuting to the office, which has saved us in excess of £20 million and we've cut paper consumption from 30 million to 6.5 million. As a result of all of this, we have created a much more energetic environment that people really thrive on.

And we're hearing from our customers that the economy has forced their hands. They need to get to market faster, they need to respond to their customers faster and they need to find increasingly more creative ways to remain competitive.

We do believe that in this new era, organisations have an opportunity to drive flexible working forwards and mobilise their workforce in ways that were never before achievable. 4G is a key enabler for embracing this change. The report indicates that 81% of users and prospective users say 4G will improve productivity and nearly a third believe 4G can significantly enhance the flexible working experience. But as with all change, businesses will need to overcome a number of cultural and technological barriers to make it happen.

This latest report in the Perspective Series explores how rising consumer expectations in a new 'age of me' have impacted the workplace and seeks to draw out the realities of working flexibly, collaboratively and remotely.

Again, I'd like to say a big thank you to Circle Research, CCS Insight and all our contributors for their independent insight and guidance. And of course to all those who took part in the research and shared their ideas and views. We hope you enjoy the results and find the report useful, practical and actionable.

A handwritten signature in dark ink, appearing to read 'Jeroen Hoencamp'. The signature is stylized with a large, flowing 'J' and a long, horizontal stroke at the end.

Jeroen Hoencamp,
Enterprise Director, Vodafone UK

More from the Perspective series

The Perspective series gives you fresh insight into the world of work. Find this latest report at www.yourbetterbusiness.co.uk/perspective and for other resources and insights www.vodafone.co.uk/perspective

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Length
36
Pages



People
554
Surveyed



Read time
2
Cups of tea

The people behind it



Abigail Ahern, Interior Designer

Designer, style maven and author Abigail Ahern is recognised amongst design aficionados internationally for her enchanting take on interiors. She is an influential tastemaker highly acclaimed for her trend setting designs that are synonymous with glamour, eclecticism and wit. Heralded as 'style spotter extraordinaire' by The Times newspaper, she regularly contributes to television and radio programmes, magazines and newspapers.



Andrew Dalglish, Director, Circle Research

Andrew has specialised in B2B research for over a decade and co-founded Circle Research in 2006. He is a columnist for B2B Marketing Magazine, a frequent speaker at leading events such as the Social Media World Forum and teaches the MRS B2B research course. Andrew holds an Honours degree in Psychology from Aberdeen University, an MSc in Marketing from Strathclyde University and an MRS diploma.



David Collier, NA DipTP MRTPI, Chief Rural Affairs Adviser, National Farmers Union

David, a chartered town planner since 1986, has worked for the National Farmers' Union of England & Wales (NFU) for over 30 years. Serving as the NFU's planning adviser and spending two decades in the regions he returned to NFU headquarters in September 2011. His current role covers rural development, the localism agenda, Local Enterprise Partnerships, rural broadband and rural crime. He sits on a number of national committees and groups concerned with rural broadband.



Katharine Pooley, Founder and Managing Director

Katharine creates inspiring interiors for discerning clients and travels widely to redesign the interiors of many top addresses. She has a boutique in Knightsbridge and recently opened her first outpost in Doha, Qatar. Recent assignments include the Royal and VIP Lounges at Heathrow's Terminal 5, and palaces in Kuwait and Qatar. She has won esteemed Decorex awards and is consistently featured in the Andrew Martin Top 100 international interior designers. She is married with two young sons.



Kester Mann, Principal Analyst, CCS Insights

Kester has established a reputation as an informed commentator on his principal focus areas of mobile operator strategy, European markets and LTE. He came to CCS Insight in October 2011 from Nokia, where he held the position of market analyst, specialising in mobile operator intelligence and device forecasting. He was previously a senior research analyst with Informa Telecoms and Media.



Emma Jones, Founder of Enterprise Nation

Following a degree in Law and Japanese, Emma joined international accounting firm, Arthur Andersen. In 2000, bitten by the dot.com bug, Emma left the firm to start her first business, Techlocate. The experience of starting, growing and selling a business from a home base gave Emma the idea for Enterprise Nation which was launched in 2006. The company has since expanded to become a small business community of over 75,000 people who access content, events and funding; online, in print and in person.



Lara Morgan, Founder and Ex.CEO Pacific Direct Group Ltd Founder of KUTA.me

Lara Morgan built and sold 99% of Pacific Direct for £20 million, has business interests in a number of companies, including Sandpits Sodash, Scentered and The Luxury Slipper Company. She is an inspirational keynote speaker, and a visiting lecturer at Cranfield Business School. Lara has authored the Amazon best selling book "More Balls than Most," and through her KUTA and Company Shortcuts brands intends to change the world through trailblazing and transforming enterprise learning.



Mike Gibson, UK Enterprise Sales Lead, BlackBerry

Mike is responsible for evangelising the BlackBerry solutions and architecture to business customers and building direct relationships with the BlackBerry partner network, focusing on the enterprise space. Prior to joining BlackBerry in 2011, Mike was an application delivery specialist at F5, working as Sales Director for major accounts. Previously, Mike held a variety of sales positions at Nortel Networks over a 13 year tenure with the company.



Nicola Rabson, Partner, Linklaters

Nicola has worked at Linklaters since 2000, where she advises on all aspects of employment law. She has advised on numerous high value employment claims in the High Court and Tribunal system. In addition to contentious matters, she advises on executive terminations, redundancies (individual and collective), disciplinaries and investigations and legal employees relations matters. Nicola is a hands-on owner of her work. She has spoken at various "White Paper" employment law conferences and written articles for publication.



Tom Ball, founder of NearDesk

Tom Ball is a speaker and consultant by background, he built a company helping FTSE 100 companies communicate their strategy to their staff, interviewing over 1,000 senior staff globally. Tom spent those years wishing someone would create an "Oyster card for desk space" before creating NearDesk. He is described as "helplessly in love with people", passionate about letting people be great.



Dr Sen Lin Zhang, Principal Architect in the CTO Group at ZTE

Dr Zhang's responsibilities include new technology analysis, high level technical engagement with key European telecom operators for technical discussions and co-operation. He has more than 20 years working experience in leading global telecom operators and equipment suppliers and about 15 years working experience in RAN technology assessments. Dr Zhang received his PhD degree from University of Wales in 1992.



Santiago Tenorio, Head of Network, Vodafone

Yago joined Vodafone UK as Chief Network Officer in December 2010 and now lives in London having previously held a number of roles within Vodafone, including Chief Technology Officer in Vodafone Ireland and Head of Radio Products for Vodafone Group (where his Radio Product team was named most influential unit in the Mobile Industry in 2007 and 2008).

Introduction

What role will 4G play in re-inventing the workplace?

Whatever the type of business you're running, we all strive to create the best environment for both financial and human gain – organisations and people working in better and healthier ways benefits us all.

In these tough economic times, forward-thinking businesses realise that the most important innovations are a combination of both technological and better working practices. Whether you work from a home-office, on a smartphone or tablet on the move, or in a large serviced office, the pace of change is hard to escape.

Technology is changing what we know and how we talk to our customers, citizens and our employees. Their expectations have never been higher, demanding access to information and services at the touch of a button. We are witnessing the latest data driven revolution in mobile which is enabling a more responsive and dynamic experience – the next big driver of which is 4G.

Whenever we talk about 4G, we're always asked, 'what does it mean and will it make any sort of difference to my business?'

The first question is easy; 4G simply means the 'fourth generation' of mobile communication – essentially the next step in wireless broadband that is set to improve on the old 3G signal we're all familiar with.

The second part of the question, 'what difference will it make to my business?' takes a little more explanation which we explore and debate in this report, with insights and case studies from business leaders and organisations from across the private and public sector.

Our expert contributors share their thoughts on flexible working and mobile data and how smart businesses are staying ahead of the competition and how businesses are using this wealth of new data to enable real time responses and analysis to support the services that the 'age of me' generation expect.

And in an era of big data, flexible working and collaboration, 4G technology could amplify the benefits for your business and help you stay ahead of the competition – 69% of our respondents say communication needs to be faster and more responsive.

Our research, conducted with 554 organisational leaders across UK PLC, uncovered some fascinating insights into the world of work. For instance, 70% of business leaders believe that flexible working helps businesses retain top talent and 74% think their business would benefit from it. However, an alarming number feel that today's under-delivering technologies are hindering adoption.

This report draws on expert opinion and insight to give you the information you need to make the decisions that will help you deliver in the 'age of me' era.

Executive insights

Everything's changing

Of course the world is changing. And of course 'it's the economy!' But there's more to it than that. Economic change has been a catalyst for a slower, but potentially further reaching change – a change in expectations.

As a nation we no longer take things for granted. A bank would never collapse, right? Investing in property is a sure thing, isn't it? We put greater value on authenticity. We want to deal with organisations that deliver on their promises.

We've also come to expect immediate gratification. This is part technological – high-speed internet, smartphones and online shopping has caused us to expect immediate access to everything. It's also a cultural phenomenon – shows like *The Apprentice* have created an expectation that success comes overnight.

A new era – 'me first'

The result is that people want more, faster, and will tolerate less.

As consumers we've become more demanding and we want businesses to reciprocate and reward the loyalty we show them. We've also become less patient, expecting the organisations we deal with to be more nimble and responsive.

As employees we want greater control – a greater say in the workplace and a better working environment. Most of all, we want to re-dress how we work by being more flexible, collaborative and obtaining a better work-life balance.

But these expectations aren't always met, especially in relation to flexible working. Most of those able to work flexibly don't do so, even if the will is there. Businesses of all sizes face technological issues (especially connection speed) and this acts as a barrier. Many larger companies face the added challenge of organisational culture, which can also hinder change.

A perfect storm

There are times when changing attitudes and technological advancements fortuitously collide. For example, social media was instrumental in bringing the Arab Spring to the attention of the wider world and continues to be a first source for breaking news on everything from royal babies to sports results.

4G has the potential to be one of those moments. It will be essential in delivering greater expectations of customers or employees to be met. And just as it's impossible to imagine a world without the internet, soon a world without 4G will be unthinkable. It will enable better customer relationships and completely different ways of working; it will enable the era of 'me first'.

But amongst those with no plans to adopt 4G, a significant number recognise the risk they're running. When asked to 'imagine a scenario where competitors could access information ten times faster than they could on their remote devices' (that's 4G, by the way), around two fifths feel this would have a noticeably negative impact on their effectiveness. In the 'age of me' it's likely then that even those individuals who are normally slow to react to change will soon be saying "me too" to 4G.

Research

The changing times



9/10 of 554

respondants tell us that their operating environment has changed in the last three years

**DOOM AND GLOOM?
AN OPPORTUNITY FOR THE BRAVE.**



54%
in the public sector



40%
in the Private Sector

Two fifths have found their organisation at a disadvantage in the 'new world'.

Of course it's the economy!

Whether you run your own business or manage a team, deliver goods or provide services on the front-line, you know that change is constant. But it's also reassuring to know that you're not alone. Nine out of ten of the 554 organisational leaders interviewed for this report tell us that their operating environment has changed in the last three years; almost half go so far as to describe this change as 'significant'.

And whilst change is normal, this isn't normal change – it has been faster, wider reaching and harder hitting. For many it has also been painful.

Two fifths have found their organisation at a disadvantage in the 'new world'. Unsurprisingly, given government cut-backs, those in the Public Sector are much more likely to express this view (54% do in contrast to 40% in the Private Sector).

Of course, the financial crisis and the subsequent economic downturn have been at the heart of this turbulence. But there's more to it than that. Economic change has been a catalyst for a bigger, more impactful, but potentially further reaching change – a change in expectations.

As a nation we've had our core assumptions and beliefs challenged. Imagine yourself just five years ago. If you're anything like the majority of us, there were certain things you would have taken for granted. That the odds of a major bank collapsing were so slim they were irrelevant, that property values could only ever go one way and that easy credit is normal. Now we take nothing for granted.

We also put greater value on authenticity. We want to deal with organisations that we trust and who deliver on their promises. We've seen that ultimately, when times are tough, it's every man for himself. The result is a change of mind-set sweeping across the nation. People expect more and will tolerate less.

One of the key drivers for this expectancy has been the role of technology. In our last two reports [Have a nice day!](#)¹ and [Great expectations in hard times](#)² we explored expectations of customer service and the impact of social media in how we engage and respond with our customers.

Through platforms like Twitter and Facebook, customers have a voice and conversations are moving online. But it hasn't stopped there. Fuelled by increases in speed and reliability, more and more services are embracing the power of the mobile enabled web.

DAILY EXPRESS CASE STUDY

In today's connected world, breaking news waits for no one. From goal-line to front-line, journalists are constantly providing up to the minute information to millions of readers and viewers across traditional and digital media. One of The Daily Express's busiest reporters is sports writer John Wragg. John's hectic schedule covering Midlands football and athletics attempts to balance tight deadlines, travel and working a hefty contacts book, with the need for rest and recuperation at home.

Much of the time he's attending events across the UK, travelling up to 500 miles a week. But it's at home that he writes his stories and files them in time for the paper's 9pm copy deadline.

John's colleagues on the London sports desk need to be in touch with him throughout the evening, as do his numerous contacts in the sports world. If a major story breaks, he has to react fast.

John takes full advantage of mobile email.

Like many professionals constantly on the move, John could soon benefit from the significantly increased coverage and reliability of 4G services. The increased speed and security with which he can send and receive files, access emails and review documents means it will be revolutionary with journalists and business leaders alike.

"I now access emails as much on my phone as on my laptop. I respond faster that way – and, in a world where yesterday's news is old news, that's pretty invaluable."

John Wragg,
Sports writer, Daily Express

A connected economy

Britain invented the world-wide web and not only are we in love with it, we're increasingly dependent on it. It's become the lifeblood of our economy; an intrinsic part of our lives.

[The Boston Consulting Group](#)³ estimated last year that the internet contributed 8.3% to UK GDP – more than any other country in the G20. That means the web is worth an estimated £121 billion to the UK economy and it won't stop there, rising to £225 billion by 2016.

According to data published in July 2013 by [Growth Intelligence](#)⁴ the UK has nearly 270,000 digital businesses. Put another way – not only is the web integral to almost every part of the UK economy but, on its own, it would be the fifth largest sector, bigger than healthcare, construction and education.

This connected economy means that your customers are not only acting but also reacting in real-time and your business needs to keep pace. [In the UK alone there are an estimated 24m smartphone users](#)⁵ (by 2016, that number is projected to reach 41m) – and also with over six million Britons now owning both a smartphone and tablet. They've become the empowering technologies of our age.

Customer behaviour is changing in front of our eyes, and so too is our working behaviour. You can't expect to successfully run your business – let alone your life – without access to a mobile device.

Powering the next wave of change will be the next generation in connectivity. Faster, more collaborative, more secure data services, enabled by the deployment of 4G.

That next wave of communication innovation is critical to meet our increasing thirst for data. [Google](#)⁶ estimates that 64% of smartphone owners use their device to access the internet at least once a day while 24% of us used mobile devices for our Christmas shopping.



According to IBM, every day 2.5 quintillion bytes of data are created. In fact, the growth is such that 90% of all data in the world has been created in the last two years alone.

[Click here for Kester Mann, CCS Insights full perspective](#)

PAGE VIEWS IN THE UK



1/3 of website page views in the UK are now from mobiles and tablets

comScore report

AVERAGE TIME SPENT BROWSING THE INTERNET VIA MOBILE IN THE UK EXCEEDING



9.5 hours per user per month according to comScore



£13 BN mobile retail expected to reach by 2021. According to 4G Britain.

QUALITY AND RELIABILITY OF DIGITAL INFRASTRUCTURE



81% of firms saw the quality and reliability of digital infrastructure as significant considerations in investment decisions

The 2012 CBI/KPMG infrastructure survey

A nation making decisions on the move

According to [comScore](#)⁷, nearly one-third of website page views in the UK are now from mobiles and tablets with the average time spent accessing the internet via a mobile browser in the UK exceeding 9.5 hours per user per month. In 2014 it is anticipated that mobile internet usage will overtake desktops.

The impact that 4G will have on the UK economy is dramatic. Lobby group [4G Britain](#)⁸ estimates that 125,000 jobs will be safeguarded or created in the UK between now and 2015 and that it will add 0.5% to UK GDP by 2020. Due in part to the expected benefit of 4G, mobile retail alone is expected to reach £4.5 billion by 2016 and up to £13 billion by 2021.

"Digital networks are as vital today to growing the economy as road and rail links." Rhian Kelly, CBI Director for Business Environment.

"Faster connections will drive private investment, underpin jobs and spark innovation, particularly with small firms. Globalisation means firms are increasingly ruthless in choosing where to base their operations, so the roll out of 4G services will be key to attracting inward investment as well as winning business overseas," she adds.

The [CBI/KPMG](#)⁹ annual infrastructure survey published in September 2012 found that 81% of firms saw the quality and reliability of digital infrastructure as significant considerations in investment decisions, up 7 percentage points from 2011, while 43% said it was 'very significant' – up from 32%.

According to the CBI/KPMG infrastructure survey over half (53%) of respondents from companies employing fewer than 50 people stated digital infrastructure has a very significant impact on their investment decisions. This is compared with 30% of those from companies employing over 5,000 people – as smaller firms need strong internet links to reach customers and suppliers in the absence of extensive operational networks and multiple business premises.

Firms were positive about the current state of UK digital networks: four in five (82%) reported that they had improved over the last five years and a similar proportion (79%) believed that they will continue to improve over the next five years.¹⁰

"Digital networks are as vital today to growing the economy as road and rail links."

Rhian Kelly,
CBI Director for Business
Environment



The rate of new business creation in 2012 was one of the highest on record and much of this was enabled by the internet.

[Click here](#) for Federation of Small Business full perspective

A population working on the move

We are witnesses to an unfolding revolution in communications technology, one that will continue to massively extend our professional capabilities. No longer are we willing to waste precious work-time whilst travelling or commuting.

According to the [Randstad survey](#)¹¹, 18% of British workers surveyed felt that smartphones and tablets had made it easier for them to work while they travel.

Mark Bull, UK CEO of Randstad says, "in a tough economic environment, employees are under pressure to demonstrate their value to their employer and committed high-flyers are out to impress. This is manifesting itself in the fact that more employees work outside normal hours while they're commuting. The growth of new technologies such as smartphones and tablets means it's easier than ever to work around the clock. Our analysis shows the average Brit already feels they're spread too thin by having to work the equivalent of a six and a half day week. Working on the move looks like a smart way of using downtime to increase productivity and improve your work/life balance to get home as soon as possible rather than staying in the office longer."

Yet most of us are stuck in the land of '9 to 5', working in rhythms that would be familiar to our parents and grandparents. We commute on crowded trains, buses and cars, work in an office all day alongside the same colleagues and return home in the evening: to socialise, spend time with the family or just collapse in front of the TV. New technology will initiate a change in our attitudes to the workplace.

A perfect storm

There are times when changing attitudes and technological advancements fortuitously collide, take for example the role that social media played in empowering an army of 'citizen journalists' who brought the Arab Spring to the attention of the world.

The release of 4G has the potential to be one of those moments for businesses and customers alike. It will undoubtedly drive even greater customer expectations of access to information and services, but at the same time empower business owners or organisations with the ability to deliver real-time responses powered by a new wave of intelligent data analysis. It will enable increased employee collaboration and change the way in which we work; driving the era of "me first".

The majority of business leaders are wise to the extent of change. Over half feel that 4G will benefit their organisation with one in five describing the benefit as 'significant'.

The other half could be missing out. As often happens with new technology, some worry about the costs of buying 4G-enabled devices and using more data. They also express doubts about how much 4G will offer their business in terms of tangible benefits.

But the price of hesitation could be far higher than the cost of investing. Amongst those business leaders we questioned with no plans to adopt 4G, a significant number recognise the risk they're running. When asked to imagine a scenario where competitors could access information ten times faster than they could on their remote devices (that's 4G, by the way), around two fifths feel this would have a noticeable negative impact on their effectiveness. In the 'age of me' it's likely then that even those usually slow to react will soon be saying 'me too' to 4G.

"Time is the vital currency of commuting: how much of it you spend – and how you spend it – reveals a great deal about how much you think it is worth."

Mark Bull,
UK CEO of Randstad

STAYING AHEAD IN CHALLENGING TIMES

As we charge towards a new era in business, the challenge will be to meet ever-rising customer expectations in economically testing conditions. Businesses will need to change – and change fast – to stay competitive.

We spoke to 554 business leaders and this is what they told us...



2013

4G for all

2012

The Age of Me

2010

iPad hits the shelves

EARLY 2000s

Broadband goes mobile

1999

The first BlackBerry

WHAT'S CHANGING OUT THERE?

THE ECONOMY FACTOR

Almost **50%** say their operating environment has changed significantly in the last 3 years

THE EVOLUTION OF SMART BUSINESSES

89% say flexible working would benefit their organisation (Public Sector)

THE DEMANDING EMPLOYEE

Of the businesses we surveyed, **50%** said that their employees are more interested in working flexibly

HYPE ≠ REALITY

1 in 4 shun flexible working because of slow access via remote devices

CONSTANTLY CONNECTED

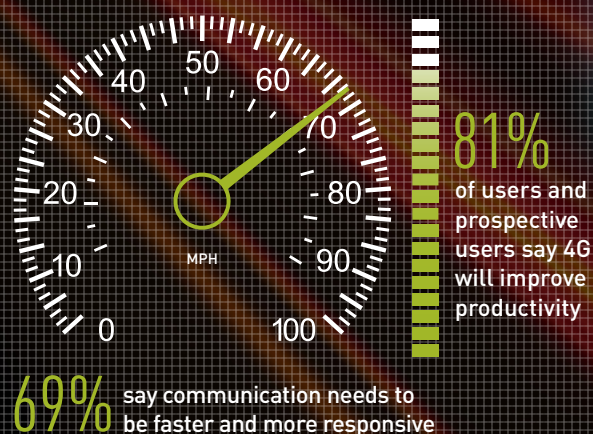
Smartphone penetration will rise from **24m to 41m** by 2016

THE AGE OF 'ME'

What matters to employees has changed significantly. We all have rising expectations and demand immediate gratification in life. It's not just about money anymore ...³



THE NEED FOR SPEED



FLEXIBLE WORKING COULD SAVE UK PLC £8.1 BILLION A YEAR

1993

Email takes off

1987

Microsoft Powerpoint launched

HOW 4G CAN HELP BUSINESSES

MORE PRODUCTIVITY

Work at office speeds out of the office, minimising downtime

A MORE CONNECTED WORKFORCE

Improved connection, communication and collaboration

MORE SECURE DATA

Access centrally saved information instantly and securely

FASTER ACCESS

Seamless mobile downloads of large files at high speeds

MORE NIMBLE BUSINESS

More informed decision-making with remote collaboration

1. The Perspective series: A perfect storm, August 2013, www.yourbetterbusiness.co.uk

2. Manpower: The world of virtual work facts and statistics

http://files.shareholder.com/downloads/MAN/164668571x0x117500/bebbb96d-64a8-4a24-a3ab1a41eeffb7db/MP_World%20of%20Virtual%20Work%20Facts_Stats_FINAL.pdf

3. Randstad survey, Britain's workers are using their commutes to become more productive, 16 May 2013

<http://www.randstad.co.uk/about-randstad/news/savvy-super-commuters-spend-time-wisely/>

DOUGLAS KNIGHT CASE STUDY

Douglas Knight is a family firm specialising in blinds, rollers, awnings and shutters, with over 40 years experience. Customers range widely from homeowners to shopping centres (Bluewater, The Trafford Centre and Westfield are all clients).

Douglas Knight recently reviewed its paper-based diary system. It looked for a mobile, digital platform that would give everyone a real-time view of a centralised, shared diary. No record duplication, less room for error, better collaboration and a more efficient service.

"Staff in our office, shops and factory can see, at the touch of a button, where each fitter is and where they're going next. It's easier to reroute a fitter or sales employee to a new location if a customer suddenly cancels, and equally to accommodate a customer who requests a new time or places an urgent order. In short, we're more flexible," says Perry.

Significant benefits

- Reduced paperwork: Migration to mobile devices reduces bureaucracy and improves management
- Consistent user experience: Uniform devices, with access to Microsoft Office Outlook, delivers standard platform
- Lower call costs: Cuts the cost of internal calls
- More responsive: Faster access to data enables better decision making and faster response times

"Combined, our four fitters spent around 30 hours a week organising their daily schedules. By removing this, we've increased the amount of time they spend with customers. And, as a result, they complete more installations".

Perry Williams, Director at Douglas Knight

Inside out

Changing attitudes to work

Within the organisation we see another layer of change. Three fifths of business leaders we surveyed for this report believe that employees have changed their attitude towards them as an employer.

The biggest change concerns the balance of life – employees are more interested in working flexibly and their quality of life. This is especially true in the Public Sector where 59% of organisational leaders report that employees have become more interested in their work-life balance (in the Private Sector it falls to 47%).

Technology can empower employees to make the most of previously unproductive time, such as the commute, but this comes at a risk. The more our work extends into our commute or our time between meetings, the more we face an increase in around-the-clock work pressure.

One in ten (9.2%) of respondents to the [Randstad survey](#)¹² felt that new technology had increased the pressure on them to get work done on their journey to and from work. Employers need to identify and address these concerns.

One positive approach to the new-found work hours that smartphones, tablets and the ensuing roll-out of 4G will initiate, is for employers to recognise this extra contribution from their teams and substitute this for extra time they might otherwise spend at the office.

At the same time as expecting a better work-life balance, employees are also looking for a greater sense of control: they're more demanding, they want a greater say in the workplace and they're more interested in their working environments. Importantly, how do they work more collaboratively in this new set-up. Fair enough, when we consider that most of our waking hours are spent at work. This mind-set is especially prevalent in larger organisations, perhaps as their smaller cousins have always tended to be more inclusive.

Two other features of employment now have a more pronounced impact on employee satisfaction and determine whether an employer stands apart from the crowd.

The first of these involves the level of satisfaction and fulfillment that the job offers and how enjoyable and stimulating it is. The best employers seek to build an environment and job roles which invigorate and support their employees. This approach is essential to meeting your teams 'me first' expectations.

The second factor is how valued the employee feels. Do they have a sense of pride in what they are doing? Linked to this is the quality of leadership your business or organisation provides and how effectively your businesses vision is supported and promoted. It's about company culture. Successful employers create a tribe; a group of fulfilled employees who have a shared vision that they passionately support and they feel they personally matter and are actively contributing.

Outside in

Changing customer expectations

It's not just the working landscape that is changing and it's not just employees and employers who are demanding greater autonomy; as customers we've realised that we're in the driving seat.

Falling household incomes, increased inflation and fears over job security have forced many to be more discerning and we now also have the means to be picky. The internet has put a wealth of information within easy reach, social media has made the customer experience public and e-commerce has pulled down barriers of entry for new competitors. The balance of power is now firmly in the customers' favour and they know it. And they've become less patient and expect immediate gratification.

This is part technological – high-speed internet, smartphones and online shopping has caused us to expect immediate access to everything. It's also a cultural phenomenon – shows like *The Apprentice* have created an expectation that success comes overnight. Success not only seems like a quick and easy way to gain material goods, but also a way to appear unique and special.

We have also as a society become far less tolerant of organisations that don't reciprocate our loyalty. We're insistent that trust is earned rather than granted, and expect authenticity from those we deal with.

As business people we understand the difficulty of keeping pace with change. But as customers in our own right our expectations and demands are unrelenting. We also never have enough time in the day. We are constantly on the move and want instant access to information, goods and services at our fingertips.

In the last [Perspectives series report](#)¹⁴ we explored the priorities for organisations in today's customer-empowered, socially-driven world – the need to ensure that they bridge the gap between promise (their brand commitment) and experience (the reality of the service).

Not since the days of the local corner-shop owner and personal bank manager who knew your business inside out has there been such an emphasis on the importance of individual relationships. And with the rise of new technology, data and social media, we have never had a better opportunity to understand our customers and deliver tailored experiences or the ability to engage and respond in real-time to meet their needs.

When it comes to customer service, while telephone and email are still the preferred way for people to get in touch with your business, customers aged 18 – 24 want to use social media more often to access customer service. With over 26m active monthly Facebook users¹⁵ and over 10m Twitter users in the UK alone¹⁶, it's becoming crucial to understand where your audience is engaging with you and engage them in real-time. If a truly excellent customer experience is your goal, then an integrated multi-channel approach is a must. Be it customer service or helping your brand stand out above the noise, 4G could be one of the key drivers to helping your business fulfill its potential.

GROWTH IN CONSUMPTION ONLINE FOR BRITISH CONSUMERS



£1,000
or more a year
is spent by British
customers online



8%
of UK retail took place
online in 2010



23%
more of the retail market
was reached by 2016

Ofcom: seventh international
comms market report¹³

Welcome to the 'age of me'

Putting yourself first

These trends have taken us into a new era. An era defined by individuals expecting so much more, whatever hat they have on – as a citizen, as a customer and as an employee. It is the 'age of me', and we expect organisations to treat us all as individuals.

We are lucky to be living through the most exciting period of change in human history. Every generation from the Baby Boomers to the Millennials have been seen as 'Generation Me' but increasing expectations driven by technology have seen the emergence of the 'real age of me'.

In the last 20 years we have emerged from the Industrial Age into the Information Age with the introduction of affordable technology that has revolutionised the way we live. We can now choose where and when we take our entertainment and are no longer tied to the TV broadcast schedules. We can shop online at times to suit ourselves, check our bank balances from our phones and follow our friends through Twitter.

We now communicate electronically and can pick up our email, update a presentation or stream a movie whilst travelling the world. We can access our documents any time, day or night from wherever we are. So why do we still get into cars or jump on public transport and struggle to get to work at the busiest time of day?

The 'age of me' has a lot of implications for business. Successful organisations in this era will need to think and act differently. Most of all they'll need to be nimble – in-tune with and highly responsive to customers – and they'll need to be flexible – thinking differently about how people work and how to motivate them.

The workplace revolution is already starting to happen

[Unilever](#)¹⁷, for example, has a company-wide 'Agile Working' or 'flexible working' scheme which aims to have 30% of roles 'location-free' by 2015 and gives employees the option to work anytime and anywhere as long as business needs are fully met.

They achieve this by managing performance by results, not by time and attendance, and they expect senior leaders to set the example. The company says that agility should help it reach its goal of doubling the size of the business without increasing its carbon footprint and attracting and retain talent, notably the younger generation.

Unilever is not alone. IBM, Cisco, Vodafone and a number of other technology companies are leading the way in becoming 'agile', as might be expected. Some smaller businesses, without the legacy of a '9 to 5' routine, are also employing people on a flexible basis and seeing the business benefits.

Take Word Association as an example. This award winning PR agency has all its employees working from home at hours to suit their personal lives. They believe this has contributed to doubling the size of the business over the last ten years with high levels of staff satisfaction and low absenteeism.

YORKSHIRE POLICE CASE STUDY

"Every minute I spend completing paperwork is a minute away from the very people I joined up to serve."

Sgt. Simon Davies,
Project Manager at
South Yorkshire Police

It is a challenge faced by every police force in the UK: how to raise frontline presence, make available the huge amount of back-end data, all the while streamlining operational costs.

Like all police forces, South Yorkshire is working hard to tackle problems surrounding visibility and a lack of real-time access to critical information.

The demand for data

Frontline, covert and scene-of-crime officers need access to a huge amount of data from back-end systems.

Removing the need to rely on radio-to-radio communication, and introducing the ability to view, record and process large amounts securely without being in the station, would increase efficiencies and improve officer performance.

4G will offer the next level of connectivity, offering unmatched processing speed and the most secure mobile data service yet seen. These solutions will help empower its officers out on the beat, cutting administration time and providing access to critical police data. The challenge was to find a secure mobile platform with comprehensive coverage across the region.

"To be an effective crime prevention unit our administrative procedures must be first class. But every minute I spend completing paperwork is a minute away from the very people I joined up to serve."

Sgt. Simon Davies,
Project Manager at
South Yorkshire Police

Keep nimble to stay ahead

Responding to rising expectations in the 'age of me'

In the 'age of me', 'now!' is the customer's and employee's mantra. Patience is thin on the ground and the expectation is that everything will be immediately available. We want information and we want it on demand. And wherever you look, there are examples of brands tapping into our craving. On-demand TV channels like iPlayer and 4OD give us multi-device access to the programmes we want. YPlan, a recent entrant to the app market, rounds up last-minute entertainment ideas for a spontaneous night out.

According to our research, organisational leaders and business owners alike are already experiencing this. Two thirds report that in the past three years their organisation has had to become more responsive and mobile communications have become more important to success.

With the advent of fast fixed and mobile broadband this trend will intensify. Technologies such as 4G will allow pioneering organisations to meet the demand of 'now!' with the response of 'no problem'. As fast responses become the norm, those failing to adapt will start to hear a new refrain: 'has been'.

From our survey of 554 business leaders, nearly half (41%) are wise to this and plan to have adopted 4G within the next year. Currently 7% of respondents have already started using 4G but more importantly 34% plan to do so in the next 12 months; with these pioneers most likely to be found in the Private Sector.

Their arguments for adopting 4G are strong. They see the commercial potential of 4G's extra speed and bandwidth can translate into six business benefits:

- Improve their ability to respond to customers
- Improve the customer experience
- Enhance the remote working experience
- Make them a more flexible organisation
- Real time intelligence and analysis
- Peer to peer collaboration

But what about the other half – why isn't 4G higher up their agenda?

Two concerns are causing these organisations to hesitate. They worry about the costs of buying 4G enabled devices and the cost of using more data. They also express doubts about whether 4G will live up to the hype – 37% feel there are insufficient benefits in 4G to justify the effort and 29% are uncertain it will deliver what it promises.

ML CARS CASE STUDY

Ted Bessey started ML Cars with business partner Lee Elkins 10 years ago, and in that time it's developed a reputation for quality. Ted says: "By choosing to sell only great cars and treating our customers well, we get a lot of business through word-of-mouth recommendations". Having said that, in just a decade, Ted's noticed a change in the way customers prefer to conduct business. Whereas a phone call on a landline used to be the main method of contact, he now seals most of his deals by email alone.

Increased profitability

To make the most of customer opportunities and achieve more in his day, Ted began working more remotely. He has increased profitability by 20% because he never misses a sales opportunity, and he doesn't have to work late to complete office tasks if he's offsite all day.

"I'm around 20% more profitable because I'm doing business all the time. This morning, for example, while I worked at a garage I also bid for cars online. In breaks, I answered email queries sent through our website. Before, I would do the office work – emails, sales research, uploading adverts – then go out and do the service work offsite".

Ted says: "I'm a great believer in concentrating on what I do to earn my money. The more time I spend doing that, the more profitable I am.

Significant benefits

- Greater productivity: Mobile access to data and email means the business is no longer bound to the office
- Cost transparency across data and voice services
- Improved bottom line: Flexible working and faster response to customer leads produces a 20% jump in profits

Staying ahead of the competition

From our research, the likelihood, this group of 'unconverted' business leaders, is that the real business benefits of 4G will take longer to sink in. And it's incumbent on the network providers to make these benefits clear and tangible.

But the price of hesitation could be far higher than the cost of investing. Amongst those with no plans to adopt 4G, a significant number recognise the risk they're running. When asked to imagine a scenario where competitors could access information up to ten times faster than they could on their remote devices, around two fifths feel this would have a noticeable negative impact on their effectiveness.

Not only will they be at a competitive disadvantage, but they'll lose out on the cost efficiencies of flexible working and enhancements that 4G can bring to it. [The Flex Factor](#)¹⁸ from the RSA and supported by Vodafone reveals that flexible working could save UK PLC £8.1 billion.

Here's another striking statistic. When contemplating the last three years, one third (35%) of those planning to embrace 4G report that their organisation has been disadvantaged by change. Amongst those rejecting 4G this rises to one half (49%). Those reluctant to adapt to change are those that suffer most.

But the impact is not just on the way we work and productivity. [The RSA](#)²⁶ found that nearly half (48 %) of the study participants believed that flexible working contributes to the innovative capacity of their organisation. When analysing the association between such attitudes and overall flexible working adoption (as measured by the Flexibility Index) there was a direct and statistical correlation. This means that an increase in organisational flexibility is positively associated with an increase in the belief that flexible working aids innovation. Confidence in the innovative value of flexibility grows the more it is experienced.

The most common view supporting flexibility is that working out of the office is often much more productive. Creative ideas happen when and where they happen, and not necessarily between 9 and 5. Embracing creativity and innovation through flexible working is all part of meeting needs in the 'age of me'.

*Before working remotely
"I could do only one thing at a
time. But (now) I'm around 20
per cent more profitable
because I'm doing business all
the time".*

Ted Bessey

OUR RESEARCH SHOWS THAT
EMPLOYEES ARE MORE
INTERESTED IN WORKING FLEXIBLY



74%
of employers feel
it could benefit
their organisations

OF THESE



89%
in the Public Sector



83%
of larger organisations
are more likely to see
the benefits

'Small business owners are the ultimate flexible workers. With 70% of businesses in the UK started from home, these entrepreneurs work from the home office, from co-working spaces and meeting places, and often on the move. They are also increasingly managing a flexible workforce as small businesses grow by outsourcing and sub-contracting work to other experts and professionals rather than hiring people full time. We are seeing the creation of thousands of virtual and flexible teams which is the manpower behind the growth of small businesses and the British economy today.'

Emma Jones is founder
of Enterprise Nation
www.enterprisenation.com

Mobilising our human capital

New ways of working

In the 'age of me' organisations who adopt more innovative working practices will attract and retain the best talent. The number of traditional 9 to 5, desk-bound jobs will gradually decline as organisations see the benefits of enabling employees to work where they want, whether that's at home, in the office or at another site.

Small businesses will continue to spring up without premises, and work from the cloud on mobile devices. Flexible working will become an expectation rather than an exception. From pop-up stores on the high street to the rise of cafe culture we are working in new and innovative ways, unconstrained by the physical barriers of location.

The Chartered Institute of Personnel Directors (CIPD)¹⁹ defines flexible working as: "A type of arrangement which gives some degree of flexibility on how long, where and when employees work. The flexibility can be in terms of working time, working location and pattern of working."

A groundswell of demand is already emerging in the workforce – one half of organisations report that their employees are more interested in working flexibly. And it's not just employees who see the benefits of flexible working – 74% of employers in our research feel it would benefit their organisation. In the Public Sector this rockets to 89% and likewise, larger organisations are more likely to see the benefits (83%).

The Office of National Statistics (ONS)²⁰ has estimated that the UK's human capital which is our collective knowledge, skills and capabilities – is worth around £17 trillion. This is more than two and a half times the value of our physical, or 'tangible' assets. Even marginal improvements in productivity, efficiency or innovation through better ways of working could generate major economic returns.

Furthermore, as the notion of happiness and wellbeing become more central to the way we approach economics, the social benefits of working in more enlightened ways start to become all the more relevant.

An optimal flexible working environment comes about as a result of a partnership between employers and employees. Organisations of all sizes, from global multi-nationals to smaller family run businesses are increasingly recognising the five core benefits of flexible working.

- Savings: of time and money
- Performance: enhanced productivity, innovation and skill utilisation
- Work-life balance: enabling people to meet their non-work responsibilities
- Wellbeing: both psychological and physical
- Collaboration between peers

ABIGAIL AHERN, INTERIOR DESIGNER

When it comes to creating a productive work space at home it pretty much comes down to what you want out of your work environment. My studio and team are mostly based at home therefore I want those spaces to feel very much connected to the rest of the house. We spend such a long time in working that when I design environments for people I don't want them to feel at all corporate looking. So I tend to decorate with non officey stuff. My desk is actually a dining table, lamps are lamps I would use in my living room, I've got rugs, candles and flowers everywhere so it looks and feels almost like a cool hanging out living room. These are things that help make me more productive.

Storage is key when planning a productive working environment, wherever that ends up being. I've got floor to ceiling bookcases which house all my reference material from magazines to art books. Storage that also double duties is also pretty fundamental. Items such as flip down shelves for example to hide away all unsightly stuff are great. Sources of inspiration on how to make your work environment better for your productivity are anywhere and everywhere. I get mine from travel, museums, blogs, a walk through the park anything. Sometimes it just comes down to taking a look up and seeing what is around you.

The thing with designing the space that works best for you is that anything goes, and that's certainly the tone for interior design currently. Rules are being broken, boundaries are being pushed and it's now becoming dizzily multi-layered and referenced with products from a zillion different periods. Exciting times indeed!

"My studio and team are mostly based at home therefore I want those spaces to feel very much connected to the rest of the house. "

Abigail Ahern,
Interior Designer

Tapping into the value of the flexible economy

Across industry, a substantial proportion of employees in flexible organisations (i.e. more than 40%) feel that working flexibly is likely to 'make people happier', and that 'commuting is time wasting'. A smaller, but still significant proportion of respondents – a quarter in each case – experience 'enhanced concentration and productivity' when working out of the office, as well as 'higher commitment to work' arising from the opportunity to work flexibly.

The report in the Perspective series [Exploring the shift in employee expectations](#)²⁷ reveals why, alongside employee pull, employers themselves see two very good reasons to push the deployment of flexible working.

It is seen as a valuable weapon in the war for talent. When asked to rank the perceived benefits of remote working, improved employee satisfaction and retention tops the list. Almost three quarters in our survey (70%) name this as one of the five most compelling benefits; one fifth (16%) cite it as the single most attractive benefit. Allied to this, one half (50%) feel that offering remote working options makes them a more attractive prospect as a potential employer.

Employers also recognise the impact of remote working on organisational performance and the bottom line. Such practices are felt to create a more productive organisation (57% cite it as a top five benefit) and a more flexible workforce (50%) and to save costs by reducing the requirements for office space (54%).

Taken one step further and many businesses have deliberately implemented flexible working as part of a conscious strategy to cultivate creativity. The belief is that a more diverse working experience is more conducive to innovation, brainstorming and creative thinking.

Not only does flexible working stimulate creativity, it can also encourage productivity. Workers report being able to get more done, in less time, as a direct result of flexible working. The RSA report [The Flex Factor](#)²³ reveals the gap between employees' current weekly working arrangements and their 'ideal-world' arrangements – an average gap of five hours of wasted, unproductive time (e.g. from commuting) for all employees.

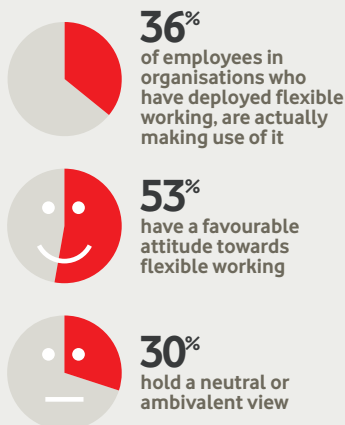
Organisations who have embraced flexible working report numerous benefits, including finding it easier to recruit and retain better talent from a larger pool. Flexible working is also reported to help top talent work in the most effective ways to suit their ability, for the benefit of everyone concerned, including customers.



We had to commute for hours a week to get to the building with all the filing cabinets and the mainframe computer. Now we don't. Daily commuting was a necessary evil – one that is no longer necessary

[Click here for Tom Ball, CEO at Neardesk full perspective](#)

THEORY AND PRACTICE OF FLEXIBLE WORKING



In our latest survey of 554 business leaders for this report, we see that theory and practice don't always align. In reality those having deployed flexible working find that despite high demand, only a minority of employees (36%) whose roles are suitable for flexible working actually make use of it. This prevents organisations from realising the full potential of flexible working.

Around half (53 %) of all employees in organisations that have flexible working have a favourable attitude towards it. Only around one in six have an unfavourable attitude, with nearly a third, (30%), holding a neutral or ambivalent view. Interestingly, there are no significant gender differences in attitude, which suggests that it is no longer thought of as a predominantly female worker issue.

Another source of variation is organisational seniority. The findings of the [RSA report²⁴](#) show that senior managers are more likely to be taking opportunities to work flexibly, compared to their more junior colleagues. This higher adoption amongst senior-level business people may be due to better awareness of policies and opportunities among these staff, the use of flexible working as a 'perk' of seniority, better access to technology such as smartphones or tablets, or the heightened demand among those at a mid-life stage which involves caring and parenting responsibilities.

The biggest barrier to flexible working is breaking ingrained habits. Managers believe that some employees will always shun flexible working as they are creatures of habit. They like the routine of going into the office, they prefer the human company of the office and they don't like blurring the home-work boundary. But it may require greater planning and support, and these attitudes reflect concern about working flexibly if it is not designed and applied the right way.

However a similarly large proportion of employees (i.e. around 40% in each case) believe that 'face to face meetings are an important aspect of work', that 'structure and routine are important', that 'people take advantage of flexible working', and that 'working remotely can be very distracting'.

For other employees though, the will is there but they worry about the signals that working flexibly will send out. There's a belief that top management haven't really bought into the idea, a perception that 'being seen' is good for career progression and a fear that by working flexibly they will be seen as 'coasting'.

And technological barriers remain an issue. One quarter of the organisational leaders we surveyed report that some employees choose not to work flexibly because of slow access via remote devices. Of course, we all have the occasional glitch but for some these are a common problem. Almost one in ten (6%) have significant problems with connection quality when working flexibly.

WHY FLEXIBLE WORKING WORKS

74%

BELIEVE FLEXIBLE WORKING WOULD BENEFIT THEIR COMPANY



70% BELIEVE FLEXIBLE WORKING HELPS BUSINESSES KEEP GOOD EMPLOYEES



1 IN 2 BELIEVE IT ATTRACTS QUALITY TALENT

REINVENTING THE WORKPLACE

The advantages of flexible working are beyond question. So what will it take for businesses to make the switch?

4G

SO WHAT'S STOPPING US?

28% WANT TO KEEP HOME AND WORK SEPARATE



1 IN 4

OF US LIKE THE 'COMMUTER ROUTINE'

19 PERCENT

BELIEVE REMOTE WORKING IS SEEN AS 'COASTING'

ONE IN FIVE PEOPLE BELIEVE OFFICE ATTENDANCE AID'S CAREER PROGRESS



22% BELIEVE THEIR MANAGEMENT HASN'T BOUGHT THE IDEA OF FLEXIBLE WORKING

23%

THINK SLOW ACCESS VIA MOBILE DEVICES IS TURNING EMPLOYEES OFF FLEXIBLE WORKING

CHANGE TAKES TIME

OF EMPLOYEES IN ORGANISATIONS WHO HAVE DEPLOYED FLEXIBLE WORKING...



36%

ARE ACTUALLY MAKING USE OF FLEXIBLE WORKING METHODS

64%

AREN'T ACTUALLY MAKING USE OF FLEXIBLE WORKING METHODS

IS 4G THE LIGHTBULB MOMENT?

4G

29%

BELIEVE 4G CAN SIGNIFICANTLY ENHANCE THE FLEXIBLE WORKING EXPERIENCE

41%

OF BUSINESSES PLAN TO HAVE ADOPTED 4G BY THE END OF 2013

TOP TIPS

1. FOCUS ON RESULTS BEFORE ATTENDANCE

2. TECHNOLOGY IS ONLY PART OF THE STORY

3. GET BUY-IN FROM EVERYONE, INCLUDING MANAGEMENT

4. DON'T EXPECT OVERNIGHT RESULTS

5. FLEXIBLE WORKING HAS BENEFITS RIGHT ACROSS THE BUSINESS

Perspectives



Kester Mann,
Principal Analyst, CCS Insights

"We are starting to see a gradual but powerful shift where young people who have grown up with smartphones enter into more senior jobs in industry and government. As these people take on projects in their organisation, their first instinct for engaging with users, customers and employees will be through their 4G connected smartphones or tablets. Overhaul the expenses system? An app. Run a customer competition? An app. Develop a new loyalty scheme? An app. And so on."

Kester Mann,
Principal Analyst, CCS Insights

Appification, big data, convergence: Fulfilling the 4G potential for business

We are at one of those infrequent but significant turning points in the mobile industry. A combination of widely available smart devices, new tariffs and the introduction of ultrafast mobile broadband is about to release huge opportunities for many businesses. The mobile industry today draws many parallels with the fixed-line market at around the turn of the century. Households were rapidly migrating from using dial-up connections to broadband. The movement unleashed a wave of new investments in websites and Internet services and usage exploded as consumers and enterprises embraced new opportunities.

Today 4G offers a similar change in behaviour. The strong growth of smartphones and seemingly insatiable demand for data is changing our behaviour at home and work once again. CCS Insight forecasts show that in the UK nearly three quarters of mobile phones will be smartphones by the end of this year and that in 2014 half of all phone shipments will be 4G-enabled.

The data opportunity is phenomenal. According to IBM, every day 2.5 quintillion bytes of data are created. In fact, the growth is such that 90% of all data in the world has been created in the last two years alone. And this trend shows no sign of slowing down. Greater bandwidth will drive new behaviours in areas such as cloud computing, Big Data, the Internet of Things and location services.

This is all very exciting but for businesses 4G offers a means of realising this potential. Faster data speeds will mean organisations will change how they organise themselves and will undoubtedly lead to improved processes, more mobility for the workforce and all-round efficiency improvements. We also expect companies will re-imagine how they interact with their customers. The combination of much more capable smartphones and tablets with a doubling of the data speeds will prove a potent catalyst. A principal approach to the latter is through "appification", a term used to describe the process in which almost everything becomes an app.

This trend, combined with the explosion in demand for smartphones, will mean a massive increase in the activity and investment levels in apps on smart devices over the next few years. And this movement will require state-of-the-art networks to support it. In fact, we expect nearly everything to become an app: your TV service, your church, your dog (perhaps through a collar with GPS and sensors to read vital signs), your car, your coffee machine, your washing machine, your opticians, your golf clubs, your children's school, your local builder, your favourite restaurants, that gift shop in Machu Picchu where you bought those delightful placemats and want to order some more. 4G is likely to play a catalytic role in the development and uptake of these new behaviours.

In fact, the potential for businesses from 4G is much greater than just the faster headline speeds that we have seen in some of the early advertising. True, 4G is typically five times quicker than legacy 3G networks.

WHAT'S 4G WORTH TO THE ECONOMY?



37 MILLION
hours saved
by companies
downloading with 4G



£730 MILLION
value of time saved
with 4G

Estimates from the Open
Digital Policy Organisation

But 4G will also form an integral part of carriers' convergent strategies. This can offer significant advantages for businesses which can establish more efficient working practices and reduce costs by taking combined services through a single supplier.

Meanwhile, exploiting the value offered in mining Big Data is an area we believe will be a strategic priority for all mobile operators this year. Networks have vast amounts of user data at their disposal and are finally beginning to realise its commercial potential and meet the obvious privacy concerns. It represents an important step in driving new revenue streams beyond traditional connectivity. Examples include offering mobile network data to retailers and public sector organisations to help with location planning, store formats and measuring footfall.

Estimates from the Open Digital Policy Organisation show that by using 4G UK companies will save over 37 million hours of time each year that would have been spent downloading data across 2G and 3G networks. Based on an average cost to employers of £19.60 per hour, they value this saved time at over £730 million.

4G clearly presents significant opportunities for business. It has the potential to be a competitive advantage for early adopters and is set to revolutionise how organisations succeed. Those companies that can embrace early and aggressively stand to gain a significant competitive advantage.

"Today 4G offers a similar change in behaviour. The strong growth of smartphones and seemingly insatiable demand for data is changing our behaviour at home and work once again."

Kester Mann,
Principal Analyst, CCS Insights



Lara Morgan, Entrepreneur and Founder of Company Shortcuts

Giving your business the best chance of success

We all know we are living and working in an ever demanding and changing world – one where we have to put the customer at the centre of everything we do.

What is clear from this report is that technology is key in business to staying in touch with your people and your customers. In a world where we are constantly on the move it's no surprise that 67% of respondents felt mobile is important to business success.

I think mobile has been at the heart of the speed with which business has grown over the last few years, and probably more than we really recognised at the time – 3G really made phones 'smart' and businesses nimble. I have fond(ish) memories of those block like phones but the fact that today I can sell from anywhere, in any time-zone and have connectivity to all I need to do my homework, to find the facts and to do the best I can – has to be progress.

Technologies like 4G could step this up a gear – for me the greater ability to work flexibly means it empowers trust in my team. And as I sit outside in the sunshine, the mobility of where and how they work, is very important. People need to get their jobs done but where they do it from is relatively irrelevant. Business is ultimately about selling and to do so successfully means you've got to be able to work on the go, in many different ways, from meetings in coffee shops, to answering emails on the commute to work.

The world will have to react to faster, better technology.

It is madness to think that people are not grasping the mobile working world.

We can work from almost anywhere – sitting on airport floors waiting for a flight, on trains while commuting or in a coffee shop before a meeting – indeed we can today work from almost anywhere. People need to stop worrying about the place, space, desk they are at and need to start grasping success comes from being out there, making proposals. And with better connectivity such as 4G we will enable these possibilities and accelerate each others potential. Thank goodness for progress in the tech world. So many facilities that exist, so much information to speed progress – people simply need to want to get out and use it, and with improved connectivity this will only make the experience better.

"Technology is key in business to staying in touch with your people and your customers."

Lara Morgan, Entrepreneur and Founder of Company Shortcuts



David Collier, Collier NA DipTP
MRTPI Chief Rural Affairs Adviser
National Farmers Union

Supporting our rural economy

Two out of every three farmers who use the internet say they would benefit from the roll-out of superfast mobile broadband (4G) according to research conducted by the NFU.

The findings are taken from the results of the 2012 NFU communications survey. NFU chief rural affairs adviser David Collier said that it was clear that farmers have high expectations of 4G mobile broadband.

"Farmers expect multiple benefits from 4G mobile broadband," said Mr Collier.

"They expect to be able to use the internet more and use it more effectively – and make better use of time away from the farm office. From doing business with their customers or seeking out new suppliers to doing administrative work such as banking, invoicing or completing online forms, the internet has become a vital component of rural life."

"Those in areas where the current landline connection is painfully slow are looking forward to using the internet much more easily and effectively than before."

"Farmers also expect to have more time to get on with farming and looking after the environment."

David Collier added that the NFU had supported a campaign last year to bring forward the auctions for 4G mobile broadband, and was pleased that one of the licenses will require that it be taken to 98% of UK premises by 2017 – and that according to the Treasury this is likely to be achieved by 2015.

"However", he said, "we need to bear in mind that 2% of the UK population amounts to more than one million people, and there are no prizes for guessing where those people live and work. The closer we get to 100% 4G coverage, and the sooner we reach universal coverage, the happier we will be. That means keeping up the pressure to ensure that the next 4G auction – which can only happen when spectrum is freed up by moving some existing users – is held as soon as possible."

This is a pressing topic for our members, and here I'd like to share some of the recent comments they have made in response to how they expect 4G to help their business:

- A farmhouse bed and breakfast who recognise that the faster speed and access to data in the volumes they need will help them manage bookings
- A rural business who uses the internet for marketing describes how 4G will benefit them by getting quicker access to information. The current coverage often breaks down or doesn't work and this can be very disruptive to smaller businesses.
- A member who uses their phone for internet, email etc., and are excited about how 4G will help them manage their business on the move. They can benefit from the speed and won't waste time from trying to connect. Will also be able to do more things on the go.

"Those in areas where the current landline connection is painfully slow are looking forward to using the internet much more easily and effectively than before."

David Collier, Collier NA
DipTP MRTPI Chief Rural
Affairs Adviser
National Farmers Union



Santiago Tenorio, Head of Network, Vodafone

How data is transforming the science of networks

I've been involved in shaping mobile networks on an international level for over 18 years. And I think mobile data is probably the biggest change in the science of networks in those two-decades in the field. The difference between when we just made voice calls and texted, and smartphones has been huge. But predicting the rise of mobile data isn't easy.

If you think back to when 3G launched and how things have developed since, you'd be hard pressed to find anyone who could have predicted the speed with which smartphones would fuel data usage.

The amount of data that we were carrying for data applications in phones, in less than one year, overtook the data we were carrying for voice – and voice had been climbing for 20 years. Data overtook it and it has never stopped climbing since. For many mobile operators, the engineering was upside down. The way they planned a network, engineered, maintained and operated it... Everything had to change.

That's a funny phenomenon – changing the longstanding way in which a network runs to fit an almost overnight evolution – but that's what everyone in the industry had to do. Now, though, we're all well out the other side of that grace period, it's caused a new shift in itself.

Internet enabled phones – especially smartphones – have made a phenomenal difference to people's lives and that's just by bringing people a few megabits-per-second. Ten years ago, 2Mbps was what you might have at home if you were lucky, and it was more than enough for any application you might think about using. Now though, 2Mbps is slow.

Today the few business applications that use a lot of data like video conferencing, document download and upload, video presentations will evolve. And functionality that we use day-in day-out on our desktops will be possible in a mobile environment thanks to the developments we're experiencing. For the first time in a while, we're evolving the network in such a way that we're well ahead of the demand from the internet in terms of capacity and coverage. And that's even without considering 4G. What that suggests to me, is that something's going to change dramatically.

What I believe is that things will change again, as much as they have over the last five years, maybe more. HD video conferencing on the go is an obvious next-step, it's already here within many offices. As are flexible working practices to a degree, but I don't think that's going to be the big thing for all that long. So, the question becomes 'then what'? How are social networks going to evolve in the context of customer service? Are we going to see something like webchat and calls by agents become dynamic, live, video interactions? Or is our insatiable appetite for real-time information and collaboration to achieve business strategy that truly puts Big Data at the heart of how businesses will transform their operations and drive productivity. Is it that?

I don't know, but I can sense something's coming. 81% of users and prospective users say 4G will improve productivity. I agree with this Perspectives report, in that for organisations 4G is that perfect storm – an opportunity to reinvent the way we work.....

"Functionality that we use day-in day-out on our desktops will be possible in a mobile environment thanks to the developments we're experiencing."

Santiago Tenorio, Head of Network, Vodafone



How technology can boost performance

Whether through enabling e-commerce, new ways of marketing or improving the efficiency of internal processes – technology offers many ways to boost performance. The internet in particular is powering the creation of thousands of new businesses and unleashing a whole new wave of entrepreneurship. The rate of new business creation in 2012 was one of the highest on record and much of this was enabled by the internet. So there is a whole new generation of digital native, tech savvy small and medium sized businesses (SMEs) coming through which is good news for the UK economy as a whole.

However, not all SMEs are so confident or proficient in harnessing technology. Our numbers indicate only a third of SMEs in the UK have a digital presence and the gap in them being competitive will widen as more and more devices and data are consumed, compounded by changing customer behaviors. Don't get left behind. For many more established businesses, understanding how to integrate what seem like fast changing technologies into their businesses can also be daunting.

All the evidence suggests that tech savvy SMEs grow faster, export more and employ more people. It is clear that the UK economy as a whole will benefit if the effective adoption of technology across the whole of the SME base is improved. There are clearly still many small companies in the UK who are missing out on the business benefits of technology.

Key steps for small business thinking about leveraging digital technology to improve performance are to get connected:

- Harnessing web enabled technology
- Be smart about staying digitally secure
- Training: Ensure employees have the skills to make the most of the tools at their disposal.

Small businesses that are investing in their technology are seeing the benefits. However given the rapid pace of innovation, it is critical that companies continue to invest and prioritise technology in their overall business development plans to keep pace with their competitors. The challenge is to make sure that businesses are aware of and have access to all of the services and support that can keep them ahead of the game.

The opportunity is to go from good to great and there are a number of things which need to be addressed: encouraging and supporting more businesses to operate online at home and abroad; tackling digital skills gaps; educating small businesses about cyber threats and the steps they can take to mitigate them; improving and enhancing business support at a central and local level; and improving the nation's digital infrastructure should be key priorities.

"In tough economic times the UK's 4.8 million small businesses need to be innovative and efficient to survive and grow. To do this, they need to make the best possible use of the technology available to them. The good news is there are lots of opportunities."

**Federation of Small
Businesses**



Nicola Rabson,
Partner at Linklater

Tapping into the value of the 'part-time' employee

I am a firm believer in flexible working. Individuals contribute to businesses in very different ways and by trusting your employees with flexible working models you can attract and retain employees who may otherwise be benefitting another business with their skills and experience.

In my experience if a person is a valuable "full time" employee that same person will be a valuable part-time employee. It is much more to do with the person than the working pattern. Of course, it is essential that both parties understand what the other expects and the deal is thought through and clear from the start. This ensures that neither side feels short changed by the arrangement.

After 10 years of working a range of patterns I know that flexible working is not an easy option. If you want to work part-time, I would encourage you to be realistic about what you are willing to commit to your career and how important your career is. I see no justifiable reason for flexible working impairing prospects. Throughout my career I have regularly worked on weekends and during my years working part-time was always available on my "off" day. I always had childcare available to me on my "off" day and was willing to swap days to accommodate my clients' needs. This was my choice and a compromise, but one I was willing to make in order to see my children during the week.

The rapid development of technology has, undoubtedly, facilitated remote working. From the employee perspective, individuals still need to develop strong relationships in order to succeed in their chosen field. If you are not physically present, it is important to make your contribution visible to the business in order to develop in your chosen career. However, this does not necessarily mean physical presence in the workplace. An individual's results should be the focus of any prudent business decision and ensuring that you share your results and successes with people is important for your career. It is often forgotten that the senior people within businesses are exceptionally busy so meaningful, brief updates relating to their business or area of responsibility can be very helpful to them.

I have no doubt that I would not be a partner at Linklaters if the Firm had not supported my requests for part-time working weeks. The Firm's support of me was rewarded by my loyalty to it and my hard work. Even now I know I perform at a higher level when I manage to strike a balance between working time and personal down time – I am more creative, focussed and capable. In an increasingly competitive environment to attract and retain talent, those businesses who are willing to adapt to the changing requirements of the workforce will undoubtedly have an advantage over their less flexible competitors.

"The rapid development of technology has, undoubtedly, facilitated remote working."

Nicola Rabson,
Partner at Linklater



Tom Ball,
CEO at NearDesk

Why flexible working doesn't just mean working from home

Saving £15,000²⁸ per London desk is a great reason to adopt flexible working – but it's not what gets me up in the morning.²⁵

The human costs, the social costs, the missed opportunities – the sheer waste of needless commuting are what make me so passionate about letting people work near home. Some companies create more carbon by their staff getting to work in the morning than everything else combined. I think let's reinvigorate our communities by living in them again not just sleeping there.

We don't need to stop commuting – just reducing it will have a massive impact. One extra person by the tube doors soon becomes a crush. One extra car at the lights becomes a traffic jam. Small changes can have huge impacts. If you need to commute daily you should care even more about helping other people commute less.

Flexible working should be flexible

We had to commute for hours a week to get to the building with all the filing cabinets and the mainframe computer. Now we don't. Daily commuting was a necessary evil – one that is no longer necessary.

The survey results come as no surprise – people often talk about how great home working is before confessing that **they** don't enjoy it much – but they are sure it works for other people – other people with no kids. A proper home office. A love of solitude. And not all the time.

Where are the most productive places to work?

When people talk about the most productive place to get things done, they talk of first class seats on trains, quiet bay windows with gorgeous views, that bench atop a mountain we see in adverts – very rarely do they talk of daily commutes, endless meetings and banks of open-plan desks.

We've seen a glimpse of what's possible with coffee shops – great for an hour of down-time – less good for making phone calls. Or thinking. Or when you need the loo, pack all your stuff and return to find your precious round table's gone.

So where would we want to work? Like restaurants, we're going to end up with a huge variety of options. They'll be close to home so we reduce that wasteful commute. They'll allow for the fact that we're social animals and provide a range of places to be productive. A "proper" office exactly where we need it.

And it's happening. Global property consultancy CBRE's latest report "The Work Shop" calls for a network of locations staff can use by the hour. As well as NearDesk in the UK, there are similar networks emerging in the US, Holland and Germany.

Start a pilot today

Early adopters are already gaining competitive advantage by embracing flexible working. We've seen an eight person team save so much money embracing flexible working and reducing their office costs that they were able to hire two more staff – all whilst enjoying work more and getting more work done.

So what are you going to do? Embracing it fully may be too big – so start with a pilot, today. Let a group of people try working more flexibly. If it works, extend it. Soon it won't be called flexible working, it'll be called working.

"Flexible working does not just mean working from home!"

Tom Ball,
CEO at NearDesk



Katharine Pooley,
Interior Designer

The rise of the home office

Increasingly we are finding that the request for a 'home office' is high on the list of priorities in our initial consultations with clients about their practical needs within their homes.

As a result, more and more clients are demanding bespoke work space within the home. Each individual's working style differs vastly and we aim to create workspaces that are tailored entirely to each client's needs.

Personally, I work between our design studios in Walton Street, London from Monday to Wednesday and from my home in Oxfordshire for the rest of the week, as well as travelling between our new shop in Doha and various interior design projects all over the world. It is important that I am always contactable and have a fast internet connection for downloading large files including many high resolution images and video content. I spend each day in meetings with clients and important suppliers and on-site, so my evenings (after my children are in bed) are spent catching up on emails and other work. I find my tablet in particular is essential for this because the large screen experience means I can more easily review documents and designs. I like to have a clear, serene space for work that is free from clutter and feels highly organised.

It is fundamental to tailor the design to the client's personal style as well as meeting their professional needs. Within a recent project, we created a bespoke office space to house the client's four computer screens necessary to conduct his finance business from his Knightsbridge home. The client requested a masculine yet intimate space which was achieved with a bespoke desk crafted from black stained oak, nickel and slate with no wires visible to ensure a sleek, understated space.

In London, where space is notoriously in short supply, we have found one solution to fulfill a request for work space is to create an unobtrusive desk area in a hallway. We created the desk with beautiful joinery made from grey stained ash with leather insets to match the chairs and ample storage space concealing printers and wires to make the most of an otherwise redundant space.

As well as saving money on the commute and the increased flexibility homeworking brings, it has been suggested that the presence of a home office raises the value of properties between £2,000 and £80,000 – I am sure this will continue to be a trend as 4G is rolled out in the UK and conditions for home-working are made even more attractive.

"The way we work has changed and continues to do so; the boundaries between the office and home are becoming increasingly blurred."

Katharine Pooley,
Interior Designer



Mike Gibson,
BlackBerry

Unleashing new opportunities for business through enterprise mobility

The past few years have seen a seismic shift in the role of mobile technology within the enterprise. A shift helped in no small part by the consumerisation of technology and the increasing workforce demand for more flexible ways of working. Where once only the highest-level managerial staff received corporate devices, today's business landscape – necessity being the mother of invention – has become an altogether more democratic space. Armed with robust enterprise mobility platforms, CIOs across the globe are overhauling legacy IT infrastructures to enable BYOD (Bring Your Own Device) or CYOD (Choose Your Own Device) strategies that not only support and embrace enterprise mobility, but unleash boundless opportunity for business. And while 3G has played a catalytic role in the evolution of enterprise mobility, the continued proliferation of mobile devices within the workplace and the resulting surge in mobile traffic has put a strain on data speeds – a roadblock to the vision of the always contactable workforce with access to vital corporate information on-the-go. Enter 4G.

What does 4G mean for enterprise?

Greater network bandwidth and throughput capabilities mean faster and more reliable service for enterprise. The anytime, anywhere worker becomes safe in the knowledge that bandwidth overloads and network failures can no longer stand in the way of his or her connectivity. This adds grist to the mill for flexible and more mobile ways of working. Equally, the rollout of 4G has direct implications for the cloud, enabling enterprises to find cost-efficiencies by migrating applications and files to the Internet. Most importantly, 4G serves to bridge the gap between traditional desktop-based and mobile working. Because, put simply, the access to corporate data and applications on the go and ability to communicate anytime, anywhere empowers enterprise workforces to fulfil all the tasks they would need to perform on a computer, from far beyond the constraints of a desk.

Are you 4G ready?

The promise of faster download times and access speeds, combined with more reliable mobile services that result from a move to 'all-IP communications' – where one single Internet Protocol (IP) supports both voice, data and video communications – is what makes 4G so important for enterprise mobility. And it's one of the reasons why BlackBerry introduced the BlackBerry 10 platform and its resulting portfolio of 4G devices. These smartphones offer a totally integrated and seamless experience with powerful features that re-define mobile working and collaboration. Take for example BBM Video with Screen Share: with the touch of a button, a chat can become a video call and another touch of a button enables the user to share their screen, allowing them to show the person the document or the file that they're viewing. BlackBerry also introduced BlackBerry Enterprise Service (BES) 10, a unique enterprise mobility management solution combining device management, unified communications, apps and security covering BlackBerry, iOS and Android smartphones and tablets. To date, more than 18,000 customers have ordered, downloaded or installed BES 10, including 60% of BlackBerry's Fortune 500 customers from verticals ranging across financial institutions, healthcare, communications and retail.

"Greater network bandwidth and throughput capabilities mean faster and more reliable service for enterprise. The anytime, anywhere worker becomes safe in the knowledge that bandwidth overloads and network failures can no longer stand in the way of his or her connectivity."

Mike Gibson,
BlackBerry



Dr Sen Lin Zhang,
ZTE

"In summary, the arrival of 4G will lead to the development of affordable, tailor-made mobile solutions and services designed to meet the specific needs of consumers and business users. 4G will forever change the way people live and the way business operates."

Dr Sen Lin Zhang, ZTE

4G: A revolution in collaboration

The introduction of the 2G network in 1992 saw the provision of the first simple data services, SMS text messaging and the promise of voice calls anytime, anywhere. A few years later, along came 3G offering mobile data access anytime, anywhere; and with it the first modern smartphones providing picture messaging, video calls and faster data transfer rates.

Now with the emergence of 4G, the first truly global mobile broadband network, things are about to change again with even faster speeds and a plethora of new services.

This new connected era will be defined by our ability to collaborate and share on the go. The way we work and play will be transformed forever.

For me the key benefits of 4G include:

- Better user experience – Ultra-fast connection speeds and a consistent service dramatically improving streaming for video, games and other services effectively turning handsets into individual mobile entertainment centres
- Faster download speeds of data means the opportunity for new services such as movie and TV downloading, business collaboration tools including video conferencing and file sharing. Soon you will be able to download large word documents and Powerpoint presentations in just a matter of seconds!
- Globally accepted mobile standards. All over the world the same mobile network standards will be adopted covering both frequency division duplex (FDD) and time division duplex (TDD) bands. This will improve economies of scale and benefit roaming, leading to a better experience for users, and cheaper services.

However 4G is not without its challenges:

- Power drain on devices might be quicker than with 3G so users may need to recharge more frequently or to have better power management or power saving methods in user equipment (UE).
- Multiple frequency bands for 4G can lead to handset complexity as more bands need to be supported by a handset for it to work in different places/countries. This could affect frequent travelers.
- As 2G, 3G, 4G and WiFi continue to co-exist, operators will need to find better ways to reduce the cost of having multiple networks and increase the synergy among networks so that the user experience is not affected.

New technologies and innovations continue to be developed to address these challenges. At ZTE our range of solutions are helping business to perform in ways previously never imagined, helping them stay ahead of the competition.

Final thought...

Whatever type of business you're running, we're all striving to create the best environment for both financial and human gain – organisations and people working in better and healthier ways benefits us all.

In these tough economic times, forward-thinking businesses realise that the most important innovations are not just in technology, but in embracing better working practices. If they do that, they will not only become better places to work, but will also offer a better product or service to their customers. And the same applies wherever you work – from a home-office, on a smartphone or tablet on the move, or in a large serviced office.

In a era of big data, flexible working and collaboration, 4G technology could amplify the benefits for your business and help you stay ahead of the competition – 69% of our respondents say communication needs to be faster and more responsive.

Our research, conducted with 554 organisational leaders, uncovered some fascinating insights into the world of business. For instance, 70% of business leaders believe that flexible working helps businesses retain top talent and 74% think their business would benefit from it. However, an alarming number feel that today's under-delivering technologies are hindering adoption.

Flexible working is far from a one-size-fits-all concept; every business needs to apply it in the appropriate way. But if you're looking to stay ahead of change, here are 5 top tips...

Five tips for re-inventing the workplace

Tip 1

Focus on results before attendance

A desk-bound employee isn't always a productive one. In a world where businesses are being launched every day without any physical premises at all, most business-based tasks can be completed even more efficiently away from the office using cloud-based technology – such as web conferencing and remote desktop access. As flexible working methods become embedded into organisations, more and more employees are discovering that productivity and better work/life balance can go hand in hand. But there is still an onus on managers to start measuring contribution and results rather than hours spent in the office.

Tip 2

Technology is only part of the story

Don't expect flexible working to just 'happen' the moment your business invests in cloud computing or tablets and smartphones. Technology is merely the tool for the job. For flexible working to be effective, businesses must set up a framework for employees that includes training, support and a culture that allows and encourages the most efficient and appropriate working methods.

Tip 3

Get buy-in from everyone, including management

Flexible working is a top-down, bottom-up concept. It needs acceptance and advocacy at all levels of the business to be successful. For instance, only if management buy into it (and do so publicly) will employees feel they have the license to work remotely.

Tip 4

Don't expect overnight results

Flexible working can yield fairly immediate benefits, like an uplift in productivity or a spike in employee motivation, but don't expect instant business transformation. Some of the truest measures of business success – like profitability and employee retention – may only be impacted once flexible working has been ingrained within the culture, and used in the most effective ways.

Tip 5

Flexible working has benefits right across the business

It's not just about working on the move, productivity and efficiency. Flexible working has knock-on effects across a business that you might not expect. For instance, if your people are working remotely on tablets and smartphones, the cost of your office overheads, like utilities, may shrink. You might even be able to downsize your office and pay less rent. And your HR department may well find it easier to hire good people, by using flexible working as a potential 'perk'.

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Methodology

About the Vodafone Perspective series

The Perspective series is designed to help businesses and public sector organisations find better ways of working. Researched independently, the series explore the biggest business challenges facing business today and provides new perspectives from independent thought leaders.

There are currently three other reports in the Perspective series:

- Exploring the shift in employee expectations
- What if?...Exploring attitudes to risk
- Great expectations in hard times, citizen service beyond today
- Have a nice day

The Perspective series gives you fresh insight into the world of work. Find this latest report at www.yourbetterbusiness.co.uk/perspective and for other resources and insights www.vodafone.co.uk/perspective

Methodology

The survey results in this report are based on 554 online interviews with business decision makers, representative of the UK population. Interviews were designed, conducted and analysed by Circle Research in May 2013.

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