

# The Global Evolving Workforce Study

Report #2: Expert Insights



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# Introduction

This study explores the global trends underway as it relates to the intersection of the workplace and technology for organizations. Spanning twelve countries, a multitude of findings pertinent to understanding the shift taking place across areas of interest such as technology adoption, workspace ergonomics, career evolution, productivity and work/life balance have been identified. The findings in each of these categories foreshadow a dramatic change in how employees will interact with their jobs, colleagues and corporate environments in the future.

# Methodology

Dell, Intel, TNS and Cascade Insights collaborated on this research to gather expert insights and further explore the future of technology in the workplace. To collect findings and expert insights, 20 experts worldwide were recruited and interviewed, in the [United States](#), [China](#), [Japan](#), [France](#), [Russia](#), [Germany](#), [the United Kingdom](#), [India](#), [Brazil](#), [Turkey](#), [South Africa](#) and [UAE](#).



# Changes in the Workplace



# Activity-Based Work

An overarching theme of “activity-based” work is starting to emerge as part of the evolving workplace and workforce worldwide. With the shift towards employees conducting work in flexible environments, across varying devices, experts came to a consensus that it isn’t only where you do your work, but what kind of work you’re doing that determines which form-factor you work on. This foreshadowing of a mobile and fluid workforce is the fundamental basis for the technological changes we are seeing worldwide in the workplace.



“I think it depends on the job. If you’re a programmer the main thing you need is coffee to stay alert and to focus and very fast computer access. Those are the key ingredients, but you don’t need as much collaboration compared to another type of employee who’s in marketing or something like that who needs to be in the office in order to collaborate face-to-face with people. I think it very much depends on the kind of work you’re doing and when and where you’re doing it.”

Patricia Wallace, US - Senior Director of Information Technology at Johns Hopkins University

“We’re moving more towards the employee, the individual, controlling the technology rather than the technology controlling the individual. One of the things that is an indication of this is the bring-your-own-device movement where now the individual can choose more how, for those using a cell phone, their tablet, their laptop or whatever, to interface with the corporate systems. It’s part of their life that they use the technology.”

Peter Thompson, UK – Speaker, Author & Consultant on Future Work

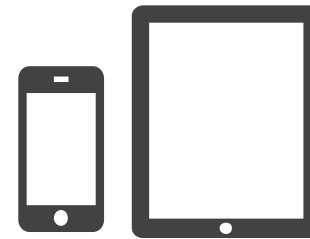
# Activity-Based Work (continued)

In APAC, Turkey, India, South Africa and Brazil, mobile technologies are, for the most part, restricted to upper management and those with seniority. Regardless of trends like Bring Your Own Device (BYOD), companies tend to provide more options for mobility to those who are not creating so much as consuming content. This typically results in upper management, sales and consultants most frequently utilizing this working method.

This sentiment is echoed throughout the findings despite the variable nature of different markets and geographic regions across the board. Worldwide, experts described instances of activity-based work relating to technology adoption, form-factor preferences, productivity and work life. While some regions view the workplace differently than others, the underlying trend towards “activity-based” work is dubbed the basis for change and may possibly be the next key driver of change in workplace behavior.

“I believe in the next few years, efforts will be most productive when invested in how and when to use the technology (phone, laptop, tablet, etc.) available to us in the most optimal way, rather than inventing other, brand new categories of technology.”

Wouter Hofman, Germany - Senior Director Global Transformation Program at Philips International



# The Current Environment

As the workplace is starting to move away from rigid boundaries, employers are starting to take note of differences emerging in how individuals are conducting their work. In many cases, this relates to workspace ergonomics and office layout in conjunction with technology. The most common shift in companies across the board revolves around how employees function in a workspace environment. This relates to back to the days of complete mobile workforces, collaboration, open floor plans and new workspace designs.

"About four or five years ago, when Intel first started driving consumerization models for its employees we went from the standard work hours and expectations to 'let's let them work from home' or where it made sense for them. A lot of corporations took it to the extreme and hired people on as home office employees. Now things are starting to change again."

David Buchholz, US - Director of Enterprise Client Strategies at Intel Corporation

As mentioned, a transition to a completely mobile workplace was the "It" trend in corporations at one point, but now modifications in workspace design are starting to balance out prior efforts.

"There are a lot of studies that are starting to cluster that suggest that we went one direction for a decade a little bit obsessed and we're going to need to right the shift."

Genevieve Bell, US - Director of User Experience at Intel Corporation

"It's no surprise. They're coming out of that last 10-year cycle where everyone was considered a mobile worker and working from home. The appearance of all those rented office spaces in places like New York and San Francisco where you could go hang out with other people who were freelancing, because you wanted to have other people around suggests the notion that everyone just wants to be somewhere else was probably a bit of an overcorrection."

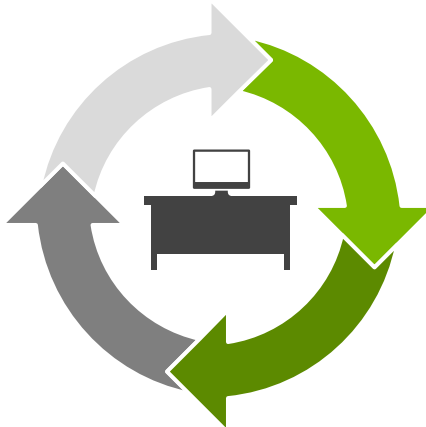
Genevieve Bell, US - Director of User Experience at Intel Corporation



# Changes in the Workspace

A consistent trend in workspace design and the future in general is the idea of mobility. Experts indicated mobile workstations or “hot spots” are starting to become the norm in a variety of office environments, across multiple industries. With that, experts also indicated an uptake in the number of conference rooms, collaborative workspaces and technology in support of the aforementioned.

As a result for this push towards mobility, collaboration and open floor plans have become the norm. Experts indicate that the push towards this offers employees the opportunity to be more fluid and agile in their work efforts.



“The intent behind more conference and breakout rooms is to have people sit together with whomever they need to work with at that particular moment. We see different levels of adoption regionally, and hence need to intensify our change efforts.”

Wouter Hofman, Germany - Senior Director Global Transformation Program at Philips International

“Our future workspace plans are focused on creating different kinds of spaces that reflect the way people need to work and the kind of work they do. You can go into work if you're an introvert and not have to wear headphones to avoid feeling overwhelmed by the ambient conversations. There's a place you can go have privacy. If you want to have a meeting with five people, there's a place to do that.”

Dane Parker, US – Vice President, Global Facilities & EHS at Dell

# Changes in the Workspace (continued)

Despite the intention behind this push for new workspace design, experts shed light on the frustrations that employees may or may not be voicing, particularly surrounding collaboration. Dorie Clark, Harvard Business Review and Forbes contributor, commented that society is becoming more attuned to the fact that not everyone works the same way, yet, open floor plans and mobile work stations don't take that into account.

"I was super fascinated that Susan Cain's recent collaboration, I think with Steelcase, about introvert-friendly office furniture. I thought that was both brilliant and hysterical. There is a good point behind it which is you can't expect that everyone is going to feel great about an office environment where they're constantly exposed and there is no privacy and people are talking and moving around all the time."

Dorie Clark, US - Harvard Business Review & Forbes Magazine Contributor

"Whether it's for concentration and focused work, whether it's for different kinds of collaboration, small/big informal brainstorming, review, lots of people talk about collaboration. The term means a lot of different things depending on what work you're doing, who you're collaborating with, etc. and it isn't always the same."

Susan Lim, APAC – Head of Workplace Strategy, Asia Pacific and Regional Director, Jones Lang LaSalle

# Changes in the Workspace (continued)

While these changes are taking place worldwide, South Africa and Turkey specifically are lagging in mirroring workspace trends. Expert Steven Ambrose of StrategyWorx indicated that South African corporations are continuing to operate in structured, cubicle-like spaces for the most part. Generally speaking, Ambrose also stated that South Africa tends to be behind in the sheer pervasiveness of the Internet, technology and its impacts on the workplace.

"South Africa and certainly Africa is a couple of years behind the sheer pervasiveness of the Internet that you see in Europe and America. For example, simple statistic is 70% to 80% of adults in America have broadband connectivity at home and at work. [...] In South Africa, we are only sitting at penetration rates of around about 35% in terms of Internet connectivity."

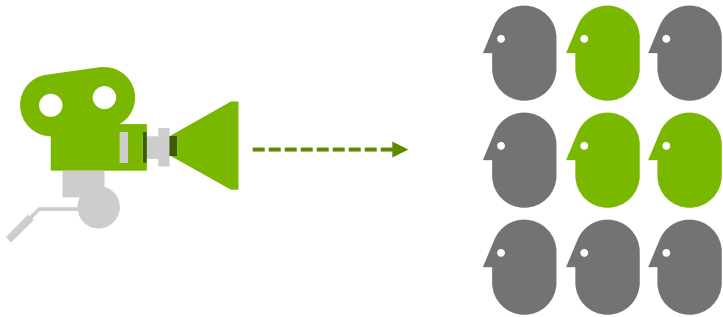
Steven Ambrose, South Africa – CEO of StrategyWorx

"Some places in Turkey have traditional office spaces and corporate headquarters usually have cubicles like they do in the United States. The open office where you share certain resources and you put your laptop and work wherever you choose to be, it's not the norm."

Dr. Hakan Ercan, Turkey - Professor of Economics & Consultant on Turkish Labor Markets

# Technology Adoption in the Physical Workspace

Expert Tim Cole and others worldwide commented on the ever-present integration of collaborative technologies in the workspace. The most frequently appointed form of collaborative technology in the workplace is the use of video and phone conferencing. While not new in and of itself, these pieces of technology paired with advances in internet connectivity provide new means of increased efficiency through virtual collaboration and for cost savings by reducing travel expenses.



"Voice and phone conferencing are becoming prevalent. It's replacing physical meetings in more and more cases. There is a growing sense of email being ineffective and a need to replace it with something else."

Tim Cole, Germany - Internet, Management & Future Trends in Technology Author

"There is a bit of reduction on the telepresence side of things because tools are getting much better where you can have reasonably good quality video on a mobile device. There are definitely challenges, particularly in China, I think, and in some places in India, where bandwidth becomes an issue, but generally, it's commonly used."

Susan Lim, APAC – Head of Workplace Strategy, Asia Pacific and Regional Director, Jones Land LaSalle

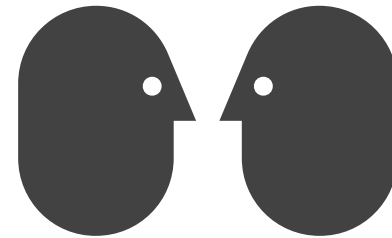
# Technology Adoption in the Physical Workspace (continued)

In many regions, the preference for face-to-face communication still exists and reigns critical to building trusting relationships. In particular, expert Riccardo Massola indicated that face-to-face communication paired with follow-up documentation via email is the norm in Brazil. Experts in the US, UK and China also supported the need for face-to-face communications in the workplace, which are ultimately driving the need and use of video conferencing technologies.

Improvements in such technologies have already started to offer ways for users to work across systems, platforms, and regions as well as provide opportunities for users to collaborate. Being able to annotate on presentations and send out notes and feedback after a call are becoming standard features. Experts specified that these subtle changes along with added features and capabilities suggest stronger adoption in the future.

"I think people have an amazing capacity to adapt to things as long as they have certain features. One of them is for example, the simulated eye contact so if you feel like you actually can see this person and they're seeing you then that helps the telecommuting relationship build in a way that it does not with just instant messaging or phone calls and things like that, which could add a lot of value."

Patricia Wallace, US - Senior Director of Information Technology at Johns Hopkins University



# The Takeaways

The fundamental shift in how the workplace is evolving is based on the concept of “**activity based work**,” both in regards to where and how people work best, but also on which form- factor different work is best accomplished.

The shift to pure open and collaborative floor plans was **teetering on the edge of acceptance** by employees, **but stalled**, as different work methods haven't been taken into account. Experts **suggested hybrid designs** including offices or cubicles paired with conference rooms and collaboration space will be the next iteration.

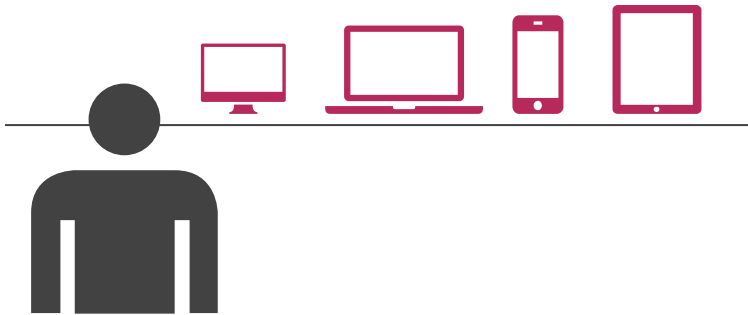
**Collaboration tools** are now ubiquitous in larger organizations and are key to working effectively virtually, so long as employees are willing to adapt and adopt.

# Technology Adoption in the Workplace



# One Employee, Multiple Devices

The days of one device to rule them all have come to an end. The shift towards computing and working across multiple devices has become evident, so much so that experts expect computing will move towards optimization of the right tools for the right function rather than expecting new devices all together. BYOD as intended for this study stands for "Bring Your Own Device", where employees have the option to utilize personal devices for work purposes.



"I think there's an essential toolkit to working remotely and, as I said, three devices at least: your mobile, your tablet, and your computer. I think you need to be able to have video conference calls. You need to have a way of getting messages immediately, so whether you're using voice or voice to phone or whatever it is, you need to be found. In a perfect world, people are multi-device literate and taking a phone, a tablet and a laptop as a sort of standard issue and using each one at best."

Robin Raskin, US - Founder & CEO of Living in Digital Times

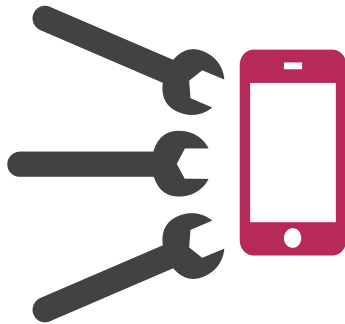
"I think that you are going to see more technology that makes you more effective when you are outside of a physical office or a corporate office."

Geri Stengel, US - President & Strategic Planner Focused on Women & Technology



# One Employee, Multiple Devices (continued)

The concept of the “essential toolkit” was reiterated by experts worldwide as the next progressive step in workplace adoption of new technologies. Utilizing different form-factors to create and deliver specific output was labeled a trend that employers need to be more aware of. Because employees themselves are invested in delivering quality output in an efficient manner, using the appropriate tools for varying projects is expected. Expert Robin Raskin, Founder & CEO of Living in Digital Times, shared her rule of screens – the bigger the screen size, the longer one spends working on the device; the smaller the screen size, the more frequently and efficiently one can use it. This notion aligns with the global demand for mobility, but also the underlying shift towards activity-based work, even more so with BYOD by expanding device availability.



“Everybody has the smartest phone in the market, so they’re basically carrying a mini-office in their phone, pretty much everything in your hand. And then you have a tablet, where you’re doing a little more. You can probably do everything right there in one of your devices.”

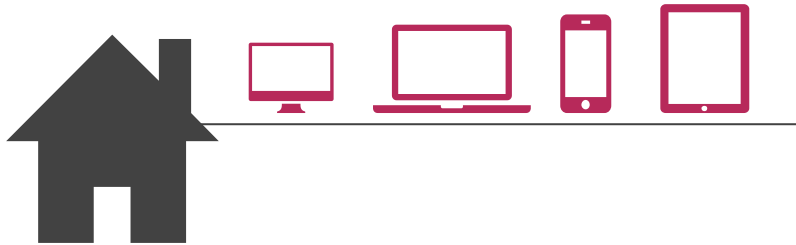
Pallavi Shrivastava, India - Workplace Strategies Consultant & Behavioral Researcher

“I think the reason people use multiple devices is because there isn’t one that does it all. Some things are better for A and some are better for B, and unless that gets resolved in some technological way, we’ll continue to see proliferation. According to Gartner studies, the average number of devices per person ranges from 6-7 and I’m not sure if that’s a good thing, but I’d prefer less devices.”

Jai Menon, US – VP and Chief Research Officer at Dell

# BYOD

Over half of employees globally are currently using a personal device for work purposes or expect to do so in the future. In some instances, it's a case of employee preference to bring their own personal devices, and in other cases, a corporate initiative was enacted to allow employees to select their devices. Regardless, the demand for higher quality instruments in the workplace is being met with the modest offering of BYOD in the workplace, worldwide.



"I think it's use your own device more than it's bring your own device because in people's minds bring your own device has a connotation that I bring it into the office. I bring it under the firewall and I want my IT manager to do something with it."

Steve Lalla, US - Vice President & General Manager at Dell

"At the end of the day employees are consumers, and so their experiences with their consumer devices and their consumer software and services have a huge impact on IT. The expectations about the degree of capability and the ease of use from a consumer side are having a dramatic impact on the tools that IT can deploy."

Bob O'Donnell, US - Founder & Chief Analyst at TECHanalysis Research

# BYOD (continued)

The advantage of BYOD became apparent when employees indicated a preference for utilizing personal devices over corporate issued devices. As security protocols were developed, the concept of BYOD then progressed to supplemental devices such as tablets or secondary laptops for remote use. In some instances, employees are known to bring their own personal laptops, but are then required to install additional security measures.

"Now there are people who are carrying tablets, and a notebook and switching off between them. Now, with the advent of two-in-one technology, where you've got a device that can be a tablet and a notebook all in one, we're seeing those are the models that people are really driving towards now, because they can do both and have both experiences."

David Buchholz, US - Director of Enterprise Client Strategies at Intel Corporation

From a global perspective, countries such as China, UAE and India are open to BYOD. For example, in China, the rapid uptake in new technology is driving demand for BYOD and, in some cases; organizations are allowing employees to select devices to be funded by their organizations.

"The take up in Asia of new technology is rapid. Everyone's got to have the new version of the new tool, and people typically just fund those themselves. I see people walking around with multiple phones and tablets and all sorts of things that are not necessarily corporate issued. So, there is absolutely a demand for BYOD in this region."

Susan Lim, APAC – Head of Workplace Strategy, Asia Pacific and Regional Director, Jones Land LaSalle

"Bring Your Own Device' is becoming popular in many government organizations as well. Smartphones and tablets are replacing desktops and laptops. We see quite a shift in the way employees are using computing resources. We see more focus on the direction on mobile."

Saeed Al Dhaeri, UAE - Technology Researcher & International Keynote Speaker

# BYOD (continued)

BYOD in other countries, like Russia and Germany, are slower to adopt as a result of high cost of ownership and security concerns. Security and legality issues were concerns across all regions, however some were more optimistic and trusting of technology.

"Germans are very security-conscious, as you may know. There's almost a fixation on being able to control the devices that employees use. Of course if an employee brings his own, then there's no legal way for the company to enforce installation of, say, security updates or special security software or whatever."

Tim Cole, Germany Internet, Management & Future Trends in Technology Author

In the case of Brazil, South American's most influential country, BYOD surprisingly has yet to take off. Standard workplace regulations require corporations to provide all required technology to employees. Moreover, experts suggested the infrastructure and security requirements have yet to mature to a point of easy integration for IT specialists.

"No, it's not common at all. You see sometimes people bringing their own laptops but only if they need to do something that's more private or things like that. If you are using a laptop or you see that around you people are using laptops, 100 percent belong to the company. Here in Brazil, we don't have the same cultural policy that you can bring your own things to the office."

Ricardo Massola, Brazil – International Ergonomics Consultant

"Dell introduced a product called Enterprise Mobility Manager earlier this year to manage mobile devices, PCs and laptops in one uniform way, including BYOD devices and corporate issued devices. There are four categories to consider: Is it BYOD or is it corporate issued; and is: it mobile devices or a PC. So EMM supports all of those four things in a uniform way."

Jai Menon, US – VP and Chief Research Officer at Dell

# Touch Devices in the Workplace

As a result of BYOD, the introduction of tablets and touch in the workplace resulted in high expectations for mass adoption. In hindsight, experts revealed that such expectations were unfounded and have yet to catch up for similar reasons as general tablet adoption.

"In 2010 PC World predicted that iPads were going to invade the enterprise. But Intel predicted right and instead delivered a client that met the true needs of the customer and not the instant reaction of the consumer."

David Buchholz, US - Director of Enterprise Client Strategies at Intel Corporation

From a global perspective, the usage of touch devices has proliferated across all regions. Expert Catherine LeJesalle specified that the adoption of touch is so apparent in France that nearly one in four families owns touch devices in the form of tablets and smartphones, which are used both personally and for work. Similarly, the enthusiasm is echoed in the UK, UAE and Turkey, and somewhat tapering in countries like India and South Africa. The difference in uptake in India and South Africa is attributed to cost as a barrier when compared to mobile phones or laptop devices. In the case of Brazil, the lack of touch is attributed to cost; status and that local employers have yet to issue such devices.

While expectations for adoption and user experience of touch is different than what was originally hypothesized, the use of touch devices aligns with the overall trend of activity-based work across multiple devices. Because touch has yet to garner workplace use cases that completely replace computing devices, experts don't expect touch devices to become supplementary to laptop devices and mobile phones.

"I think the reason [touch] hasn't taken off is it's not as rich as it needs to be. And in terms of communicating what I want to do as simply as possible, touch has a way to go."

Jai Menon, US – VP and Chief Research Officer at Dell



# Thin Clients & VDI

The introduction of thin clients and virtual desktop infrastructure (VDI) has been fairly cyclical in its nature. A trend towards such devices occurred early on and faded, and has again recently made an appearance. Experts agree that while workers are familiar with thin clients and VDI to some degree, it is corporate initiatives presenting them to the workplace. This positions thin clients and VDI as corporate endorsed devices that are gaining traction in both the market and consumer awareness.

"The thin client business has an aggregate of about 6 million units globally on an annual basis. By the way, growing at about 8% to 10% a year so it's on a very nice growth curve. So thin clients are relatively small in relationship to how many PCs are acquired for commercial purposes from a standpoint of percentage, but it is growing and we see increasing interests in physical thin clients to access the VDI data center."

Steve Lalla, US - Vice President & General Manager at Dell

"Very few people use thin clients at home; in fact, almost nobody. The only exceptions would be call center workers who work from home, but that's a pretty specialized kind of environment. "

Bob O'Donnell, US - Founder & Chief Analyst at TECHnalysis Research

# Thin Clients & VDI (continued)

Despite the lack of general awareness of thin clients and VDI's, another hurdle blocking this technology from becoming mainstream is that it currently resides in limbo. Experts indicate that the aforementioned technology will become more relevant once cloud computing and virtual technologies are generally the norm.

"One key technology element is the ability to access data remotely. This has been possible for several years starting with the old dial-up VPN's, but current VPN and now VDI technology makes this even easier and more secure. I think the ability for people to access data anywhere at any time will continue to grow and will influence how and where we work."

Dane Parker, US – Vice President, Global Facilities & EHS at Dell

"With virtual desktops, you can work from any device, anywhere and have access to all your data in the same way. Some people like that, especially if they're using different client devices. But in some environments, people are just using devices that are designed to stay in a physical location, and that can defeat the purpose of VDI's flexibility."

Bob O'Donnell, US - Founder & Chief Analyst at TECHAnalysis Research

The use of thin clients and virtual desktops outside of mature markets is limited. Experts in South Africa and Turkey indicated use of thin clients in conjunction with cloud-based storage applications, but it is still in the early stages. Similarly, in the UAE, both the government and private sector have started to utilize such technologies and expect it to gain momentum with the proliferation of the cloud.

"You'll find that the vast majority of South African corporations have virtualized and have gone private cloud to some extent. They are now just starting to adopt, for example, Office 365 on a corporate level. Generally, it's on premise, hard loaded programs that are heavy and need a proper PC to run on. They're running legacy programs on fairly up-to-date, back end systems, which is probably the best way to put it."

Steven Ambrose, South Africa – CEO of StrategyWorx

# Future Expectations of Technology in the Workplace

When asked about future trends in technology in the workplace, expert consensus revolved around an uptake in video conferencing, mobility and touch, and little expectation for new technologies to really make waves. Generally, experts also indicated that with the rapid evolution of technology, there will be no surprise in the next decade, that the majority of the current form-factors and technologies will be considered legacy devices and replaced with a new cycle of technology. That being said, the same hurdle of adoption will continue.

Chief tech analyst, Bob O'Donnell pinpointed the core challenge technology faces in regards to adoption and why adoption of new technologies tends to be higher in emerging markets: less legacy influence. Until technology providers are able to dispel end user expectations of legacy software, the workforce will inherently have hurdles to adopting new technologies in the future as they do now.

"The lack of mobile applications specifically written for these new platforms is why adoption is slow. Touch only really adds value when you've got applications that use it, and if you don't have applications that use it, then there's no need for it. The real challenge is that a lot of companies run a number of legacy applications. The reason why new technologies like touch have larger adoption in developing markets is they have fewer legacy systems in place that they have to deal with. In developed markets, there's much more legacy software in place, so it's much harder to move off of that."

Bob O'Donnell, US - Founder & Chief Analyst at TECHanalysis Research





# The Takeaways

The “Essential Toolkit” will be comprised of a laptop, mobile device and tablet in the near future. Experts indicate technology in the workplace will **align with the “activity-based”** work.

**BYOD is practiced worldwide**, more so in western and mature markets. Security and legalities continue to be concerns for employers, but not enough to avoid the offering completely.

The **adoption of touch** in the workplace has yet to gain massive traction, but is now expected to align with the aforementioned “Essential Toolkit” as a **supplementary computing device** rather than standalone in the workplace.

# Working Remotely

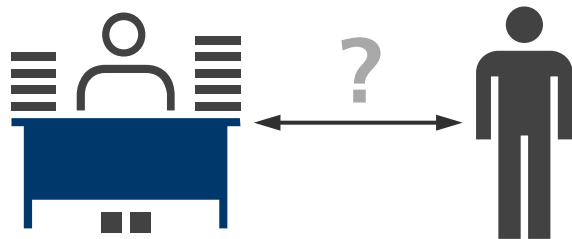


# A Blurred Sense of Work vs. Personal Continues

The blurred sense of work life versus home life is not a new concept, but one that has been taken further in recent years and is suspected to continue as such moving forward. Dependent on the industry, at any given period of time, the idea of taking work home isn't unheard of. More recently, this sense of indistinct separation of work versus personal life can be attributed directly to new technology available in the workplace. With technology increasing flexibility for when and where work is being conducted, employees are finding their work lives and personal lives intertwined, more so than ever before, and willingly.

"The lines have totally blurred, between work and home, to a large degree, for better or worse. I think it's for better because I think it makes you have a passion for your job."

Robin Raskin, US - Founder & CEO of Living in Digital Times



"We're at a moment in time where there is far more fragmentation of that than there ever has been. If you're in the knowledge work business, you work in the tech field or in the creative and arts field, I think it's safe to say that there's been a great more blurring of work. It no longer just happens in the office; it follows you home, it follows you to other places. You log into your work through a range of digital devices and portals from many places. I think that has been an ongoing trend for at least a decade."

Genevieve Bell, US - Director of User Experience at Intel Corporation

"The Germans talk a lot about work-life balance, about compartmentalizing between your professional life and your private life. That is mostly theory. In practice, of course, a digital worker is never off. You're at least theoretically accessible 24/7."

Tim Cole, Germany - Internet, Management & Future Trends in Technology Author

# A Blurred Sense of Work vs. Personal Continues (continued)

In this situation, technology is considered to be at the apex of the issue. Enhanced technology provides both employers and employees the opportunity to adjust what the concept of "taking work home" means.

"Technology is a double edge sword for workers because the benefit is that the enhanced flexibility and mobility that people have allows for really exciting developments with the potential for better work/life balance. People can be working from any geography. Companies can be saving money because they require less space to house their employees. If people want to take time to work from the Berlin office or the San Francisco office, they can do it. If they want to stay home with their kids, it is now much easier depending on the corporate culture's openness to that arrangement for them to actually, technologically be able to do it. The problem is that our culture of work has not evolved yet to keep pace with the fact that you now can work all the time."

Dorie Clark, US - Harvard Business Review & Forbes Magazine Contributor

In all countries outside of the US and UK, the ability to work from home is considered an extension of the workday, not a replacement. In countries like France, Germany and Russia, the out of sight out of mind mentality comes into play. This expectation to work outside of working hours is not seen as going the extra mile, but a standard work practice.

"Everyone pays lip service to the notion of work/life balance, definitely, but quite a few organizations do not respect working hours either for work ethics, or a notion that if an employee is owned, it's owned 24/7."

Yuri Ammosov, Russia - Director of Innovations at Analytical Center for the Government of Russia Federation

"The problem with France, and we are really an exception, is that in France there's a thought that in the manager's mind that if you are not in the office you are not working."

Catherine Lejealle, France - Consumer Behavior, Mobility and Workplace Sociologist

# A Blurred Sense of Work vs. Personal Continues (continued)

Despite the variability in work/life balance globally, we are starting to see in some markets a forced sense of boundaries enacted by employers. Whether in relation to physical locale or mobile accessibility, some corporations are starting to reclaim boundaries by limited server accessibility, refusing to answer emails after set hours or by other means. While this is not a direct result of remote workers or budgetary constraints, employers are starting to redefine work vs. home to make room for productivity and happiness for their employees.

"What's interesting is if you look outside of the US, particularly into Western Europe and it's increasingly in the financial sector in New York, you see a push to re-contain work within either the physical confines of the office or within a certain number of hours. A couple of big companies in Europe moved over, I would say year or so, to not let the employees take the technology home. Or in the case of some companies I can think of in France and Germany, actually turning off their email service over the weekend, so that email just doesn't happen and there is no work email on weekends."

Genevieve Bell, US - Director of User Experience at Intel Corporation

"I think it's really simple. Companies are looking for folks to be more productive because productivity is the backbone to business, and I think employees are looking to be more efficient and effective and, therefore, they want access to the same things they get access to in what would be the traditional work environment."

Steve Lalla, US - Vice President & General Manager at Dell

# The Remote Worker's Workspace

Regardless of expectations, the ability to work remotely effectively was dubbed dependent on two key factors: technology and location. Experts worldwide indicated as a result of the increased hours being logged at home, employees are open to utilizing their own devices when working remotely. This is partly due to accessibility and availability of technology, but also a result of consumer demand for better or alternative form-factors.

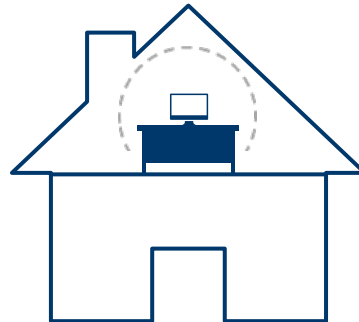
"A lot of people have better equipment and faster Internet connections in their homes than they do in their place of work. So we're seeing experiments where more people are working at home more often than they had before."

Bob O'Donnell, US - Founder & Chief Analyst at TECHanalysis Research

This notion came through in various instances as it related to technology, productivity, employee morale and accessibility. Despite all the varying factors, the general conclusion was that remote workers tend to have access to alternative devices to conduct work when they are outside of the office.

"It's two part. In one case, people want to go in the office for the kind of learning and the social nature of being around the people they work with, but on the other hand, in some cases, they can't really work from home because of the nature of their home."

Susan Lim, APAC - Head of Workplace Strategy, Asia Pacific and Regional Director, Jones Lang LaSalle



# The Impact on Career Evolution

A common concern voiced among remote workers has been one of career advancement. In the US and UK, experts indicated that technology neither adds nor detracts from a candidate's potential career progression; rather, it is up to the employees themselves to be relevant. Because technologies offer more options as to how work gets done, it falls back on the employer to be conscious that employees are fundamentally the ones doing the work; technology is merely an enablement tool.

"I think people are the backbone of work getting done, and so I agree that the people part of getting work done is incredibly important today and in the future. The trick is as those people want to be closer to the customer, in the field, and be mobile how do I enable them to access the applications and content that was previously developed and designed to only be available in a secure, physical work environment? How do I liberate the person to be in front of the customer with their peers or their employee partners and out and about using the devices that they have and be productive? I think technology is an enabler. Technology isn't the do-er necessarily."

Steve Lalla, US - Vice President & General Manager at Dell

# The Impact on Career Evolution (continued)

The association of working remotely impacting career advancements is neither supported nor negated in other regions since the concept of remotely working has yet to become mainstream. Experts were unable to comment on any correlation; however, a hierarchical dynamic was suggested as to why employers in other markets prefer in person, face-to-face accessibility of their employees.

In India, China, Japan, UAE, Turkey, South Africa and Brazil, the concept of cultural hierarchy, professional mentorship and face time are key components of one's job. The idea of working remotely is extremely uncommon and lends itself to missing out on guidance and potential opportunities. While organizations are flattening and cultures are boasting modern outlooks, cultural expectations remain.

"It's a pattern of this society. You have to be mentored, tutored, and kept an eye upon."

Dr. Hakan Ercan, Turkey - Professor of Economics & Consultant on Turkish Labor Markets

Worldwide, experts also indicated that if employers were more consciously aware of the reasons for why they hired particular employees, specifically those who work remotely, they inherently should be less concerned of productivity and output when evaluating their work.

"If you're working at Google, you've already demonstrated high levels of achievement. This is where they win. They hire people that have such high motivations that they don't need to worry that these people are going to slack off and take advantage. That's not how they're wired. They get the benefit of hiring people like that."

Mark Crowley, US - Leadership Change Agent & Author of *Lead from the Heart*

"Normally, we only leave the office when our bosses leave the office. If the managers and directors do not leave the office very early, you just stay in your office as well. It's a cultural thing that shows that you are doing a hard job, then you stay a little bit more."

Ricardo Massola, Brazil – International Ergonomics Consultant



# The Impact on Career Evolution (continued)

Regardless of productivity, efficiency and technology, there continues to be a stigma around working remotely with limited "face time." Experts indicated that in the US, the expectation to be in the office and in person is starting to dissipate overall and that the real challenge is being able to cultivate trusting and natural relationships. Without organic opportunities to develop such relationships, employees have to work harder at creating those dynamics, which is considered to be the latest issue as it relates to remote work.

"I would say it's a fast declining stigmatism that not being in the office is a bad thing, but I would only caveat that to say there are going to be work environments where that's the only way it's going to get things done for a variety of reasons. In some environments regardless of what your desire is as an employee to consume data and to consume applications outside of that environment, it just may not be possible from a regulation or compliance perspective."

Steve Lalla, US - Vice President & General Manager at Dell

"I think that the challenge for any employee that works from home, or on a related note, works in a different office than other people, is that no matter the quality of your work you have less organic opportunities to build casual relationships with people; therefore, it may be less, it may be harder to develop a kind of implicit trust. People are not going to want to promote you unless they really feel that they know you and they trust you. You can build it up to a certain extent over time just by doing good work, but it is something that also builds up because of a series of steady interactions that you have in person with people and they get to have a sense of your personality. It can be a disadvantage to work from home or work from remote, but it is a surmountable disadvantage if you are strategic about finding other ways to come in regularly, to make an effort to have meetings, to make an effort to make yourself known proactively."

Dorie Clark, US - Harvard Business Review & Forbes Magazine Contributor

# The Takeaways

What is **considered remote work** in the western regions like the US and UK is not the same as in other countries, where working from home is an **extension of your workday**.

Expert testimonies indicate that despite having access to newer technologies and collaboration tools, cultural and workplace expectations **don't leave room to adopt working from home as standard practice** in the near future, but possibly in three to five years.

**Working remotely** in relation to career evolution is **dependent on the employee**. Experts in the US, UK and India spoke to one's success being dependent on their individual ability to be productive regardless of location.

# Future Trends

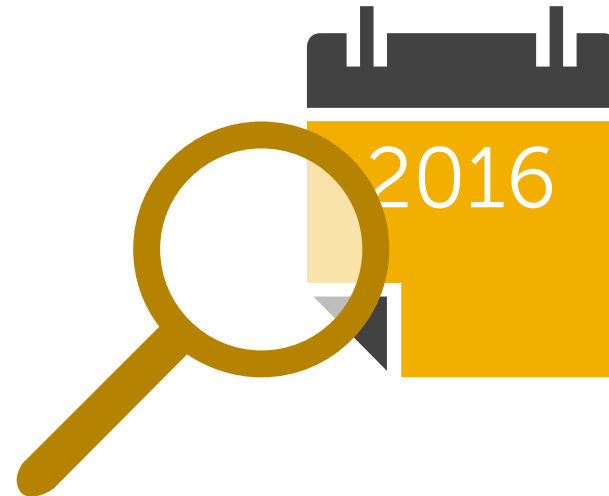


# The Internet of Things

When asked about the future, experts revealed anticipation for advanced mobile connectivity, computing and the Internet of Things (IoT) in the coming years. With a number of new companies focusing on collecting and delivering data as a result of mobile connections, it is a fair assumption that IoT too will enter the workplace. Russia, South Africa and Brazil are pessimistic of when Internet of Things will actually arrive in their regions, but APAC, UAE and Turkey all look forward to the integration of such connectivity in their soon to be Smart Cities. The expected timeline for the Internet of Things to become accessible is anywhere from two to five years from now. Ultimately, regardless of when and where the Internet of Things comes into fruition, the general consensus is it will lead to more opportunities to work effectively.

"There will be more pieces of glasses, more devices and there will be more ways to stay productive if in fact the employee and the employer have that agreement and the regulatory bodies in the industry afford that opportunity."

Steve Lalla, US - Vice President & General Manager at Dell



# Big Data

As a subset of The Internet of Things, experts indicated that Big Data was more likely to be key in the near future, particularly as it relates to career evolution and productivity. Currently, discussions surrounding Big Data and career advancements are underway. Because data has always been a fundamental gauge in how career advancement is measured, it is considered not to be a far leap to expect Big Data to play a role in future assessments.

Experts suggest Big Data will become a component of career evaluations, measuring productivity of remote workers and a general means of synthesizing employee output. In the case of future advancements, changes in the workplace and career opportunities, statistics and figures surfaced by Big Data will likely provide previously hypothesized insight, offering additional perspective when making decisions.

"Data has always been, and will always be, foundational to measuring a part of an employee's performance, but that employee's ability from a personal, leadership and capability perspective is where the what and the how differs."

Steve Lalla, US - Vice President & General Manager at Dell

"One beneficial aspect of big data is the ability to use it in making better relationships with your employees so that you understand what their behavior patterns are and how you can better meet their needs with innovative offerings."

Patricia Wallace, US - Senior Director of Information Technology at Johns Hopkins University



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# The Takeaways

Experts are **excited** for the idea of the **Internet of Things** but are realistic in their expectations for when it will enter their regional markets.

The **use of Big Data** in career advancement is likely **the first step** of **integrating data collection** into the workplace, as it could provide valuable insights into employee effectiveness.

# Looking Forward

# Looking Forward

Throughout the study, experts shared their perspectives on the current state of the workforce and how technology has hedged in various regions. While growth and adoption metrics ranged from region to region, the selection of technologies has been homogenous across the globe. This will continue to be the case in the future; with a general expectation worldwide indicating the workforce will transition from what currently exists – a disjointed approach to flexible working – to a more encompassing way of conducting work.

UK and US experts anticipate the masses to move towards being remote, increasing the need and demand for mobile solutions. Similarly, international experts suggest technological advancements will aid in more flexibility, although still hesitant of a completely mobile workforce. As a result, the market is likely going to see more technology that supports individuals in being more successful when outside the physical office. The speed at which mobile work solutions are adopted will vary depending on legacy hurdles as stated earlier, but the demand for technology and flexibility will continue to be steadfast.

"We're certainly moving towards an era, at least in the knowledge work end, where there is greater heterogeneity and more flexibility. More choices and more flexibility."

Genevieve Bell, US - Director of User Experience at Intel Corporation

"I don't believe that organizations are ever going to get to a point where they're going to say, 'Nobody needs to come in.' I just don't see that happening. I think the dynamic of people being in the same place, working in the same place, being able to drop in on one another is way too powerful. But I do think that working from home is a convenience that we should be taking advantage of. I just don't think that we're going to get to a point where we're going to expect people to work from home."

Mark Crowley, US - Leadership Change Agent & Author of *Lead from the Heart*

"One clear change with technology is it will continue to offer the ability to work more. I think most companies see that as one of the key benefits of mobility and BYOD. Companies are going to get more productivity out of their employees just because of additional time spent. It's not necessarily more productivity per hour, but just more hours, if you give them access to effective mobile devices."

Bob O'Donnell, US - Founder & Chief Analyst at TECHnalysis Research

"Dell wants to make sure we offer choice to customers and we give them all the different ways in which they want to work."

Jai Menon, US - VP and Chief Research Officer at Dell



# Dell & Intel's Contributions to Workplace Technology

After speaking with experts worldwide, TNS and Cascade Insights spoke to leading experts from both Dell and Intel. After gleaning insights into the current status of the workplace and technology, Steve Lalla, Jai Menon, Dane Parker, David Buccholz and Genevieve Bell spoke to initiatives underway to support the evolving workplace, particularly in the realm of mobility and future technologies.

The ability both Dell and Intel have in being able to touch and add value to the different pieces of the computing continuum gives ample opportunity to help develop technologies that affect every piece of the evolving workplace. As it relates to remote work utilizing VPN, thin clients and VDI versus components that are integral to collecting Big Data and feeding the Internet of Things, both companies are going to be key in relation to future technologies.

"We have research projects looking at technologies in a wide spectrum of areas. Four specific areas we focus on are: Next Generation Data Center and Cloud, the second one is Security, the third one is Big Data and the fourth one is Mobility and the Internet of Things."

Jai Menon, US – VP and Chief Research Officer at Dell

"Intel and Dell have, for a long time, been innovating on computing platforms, whether it was desktops now, into laptops and tablets and two-in-ones. I see this ongoing commitment to bringing the best performance into the most form-factor appropriate devices and given people's choices. Because that's what we need. We need to be able to have the device that makes the most sense in the moment we are in—the most sense because of its performance or because of its form-factor or because of its stitches."

"I think what we will continue to see is the partnership between Intel and Dell driving innovation in traditional form-factors and in some places making these things new altogether. The tablet didn't exist four years ago or five years ago and certainly didn't exist in the way they do now. I think there are sometimes new possibilities for how we will connect and collaborate."

Genevieve Bell, US - Director of User Experience at Intel Corporation

# The Takeaways

Future technological advancements will **enable greater flexibility** and support individuals better outside of the physical office.

**Dell and Intel** are committed to **innovating in support of the evolving workforce** with initiatives focused on delivering the best performance and offering choice into the workplace.

# List of Experts

# List of Experts - US



## David Buchholz, US

Director of Enterprise Client Strategies at Intel Corporation

## Genevieve Bell, US

Director of User Experience at Intel Corporation

## Steve Lalla, US

Vice President & General Manager at Dell

## Bob O'Donnell, US

Founder & Chief Analyst at TECHanalysis Research

## Robin Raskin, US

Founder & CEO of Living in Digital Times

## Patricia Wallace, US

Senior Director of Information Technology at Johns Hopkins University

## Dorie Clark, US

Harvard Business Review & Forbes Magazine Contributor

## Geri Stengel, US

President & Strategic Planner Focused on Women & Technology

## Mark Crowley, US

Leadership Change Agent & Author of Lead from the Heart

## Dane Parker, US

Vice President, Global Facilities & EHS at Dell

## Jai Menon, US

Vice President of Research & Chief Research Officer at Dell

# List of Experts - International



APAC – Susan Lim

Head of Workplace Strategy Asia Pacific and Regional Director, Jones Lang LaSalle



China – Wouter Hofman, Senior Director Global Transformation Program at Philips International



France – Catherine Lejealle

Consumer Behavior, Mobility and Workplace Sociologist



Germany – Tim Cole

Internet, Management and Future Trends Author



India – Pallavi Shrivastava

Workplace Strategies Consultant & Behavioral Researcher



Russia – Yuri Ammosov

Director of Innovations at Analytical Center for the Government of Russia Federation



South Africa – Steven Ambrose

CEO of StrategyWorx



United Kingdom – Peter Thompson

Speaker, Author & Consultant on Future Work



UAE – Saeed Al Dhaeri

Technology Researcher & International Keynote Speaker



Turkey – Dr. Hakan Ercan

Professor of Economics & Consultant on Turkish Labor Markets



Brazil – Ricardo Massola

International Ergonomics Consultant