

The future of work

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In Jan – Feb 2020 we conducted a study

1,102

business spoken to

4

North America,
Europe, Australia, Asia

32%

c-suite
representation/board
members

\$500M+

annual company revenue

9

sectors analysed

27%

\$5Bn+ annual
company revenue

To assess the future-readiness of businesses

Across four aspects:

- Technology adoption
- Skills and behaviours
- Leadership and cultural change
- Ways of working

Answering five key questions

What are their business priorities?

How are they equipping their workforce with the right skills?

What steps are they taking to create the right culture?

Are they investing the right technology?

Which sectors are most prepared?



But then the world changed

Business closures

Industries in turmoil

Global recession

People furloughed

Redundancies on the rise

**New practices and
priorities are emerging**

A woman with long hair is seen from the side, sitting at a desk and typing on a laptop. The scene is dimly lit, with light coming from a window behind her, creating a soft glow on her hair and the desk. On the desk, there is a white coffee cup on a saucer and a pair of glasses. The overall mood is quiet and focused.

A third of all European employees now working from home

33%

United Kingdom

35%

France

22%

Germany

44%

Italy

25%

Norway/Sweden

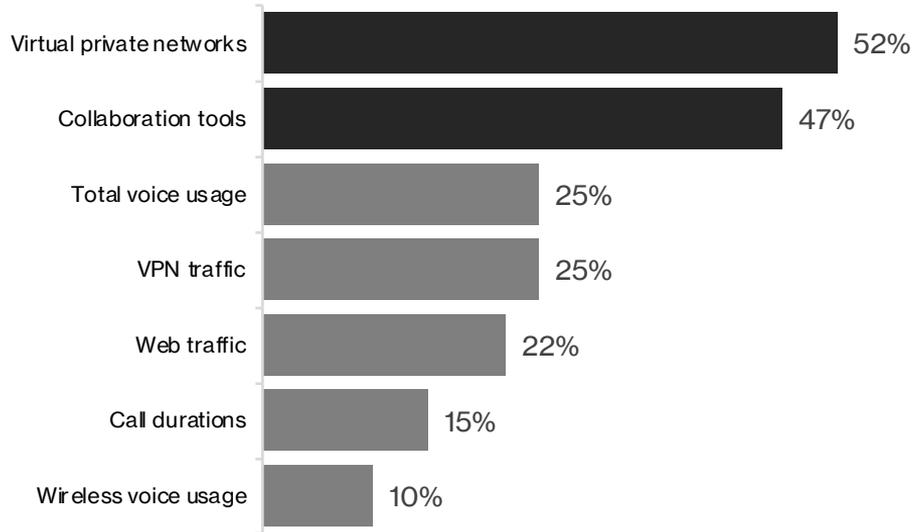
49%

Spain

48%

Denmark

Telecommunications providers saw surges in data usage



United Kingdom

35-60%

Spain

40%

France

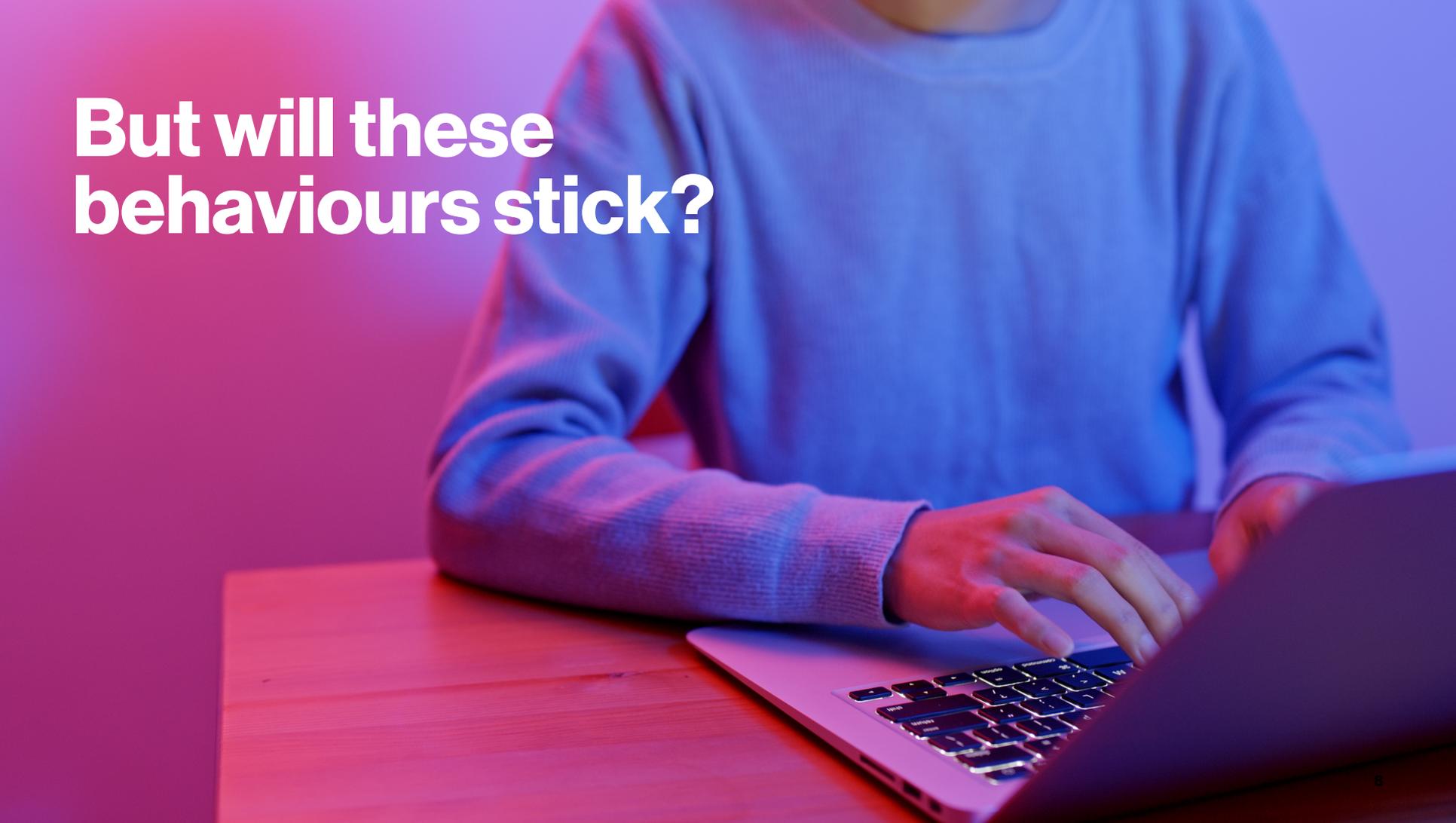
2x

voice traffic

Italy

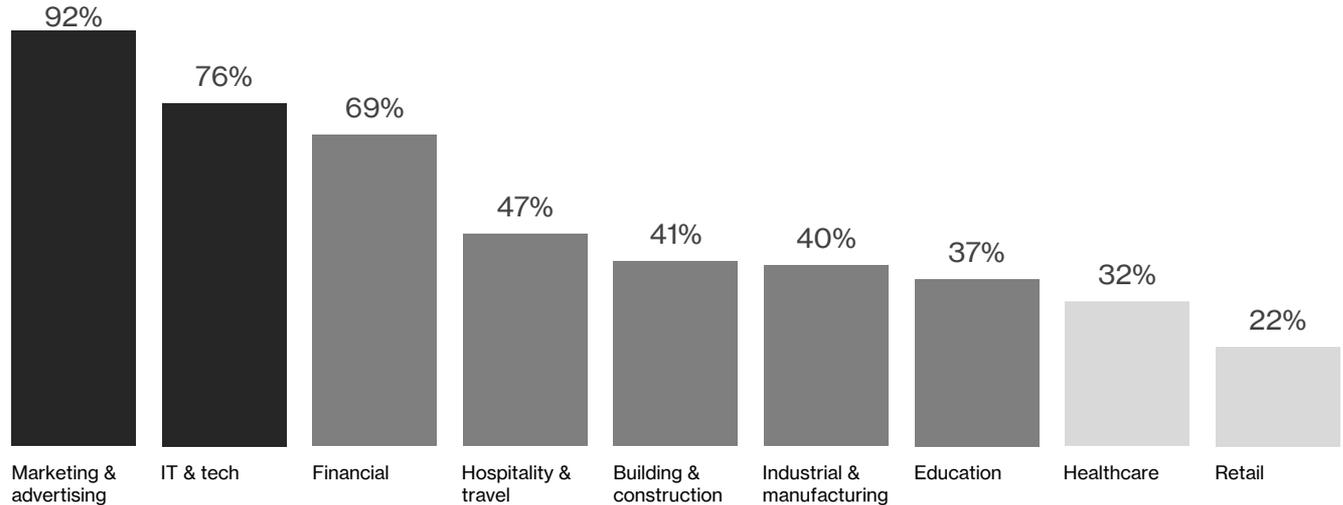
63%

**But will these
behaviours stick?**

A person wearing a blue sweater is sitting at a wooden desk, typing on a silver laptop. The scene is illuminated with a strong red and blue gradient, creating a moody atmosphere. The person's hands are positioned over the keyboard, and the laptop is open in front of them. The background is a soft, out-of-focus light blue.

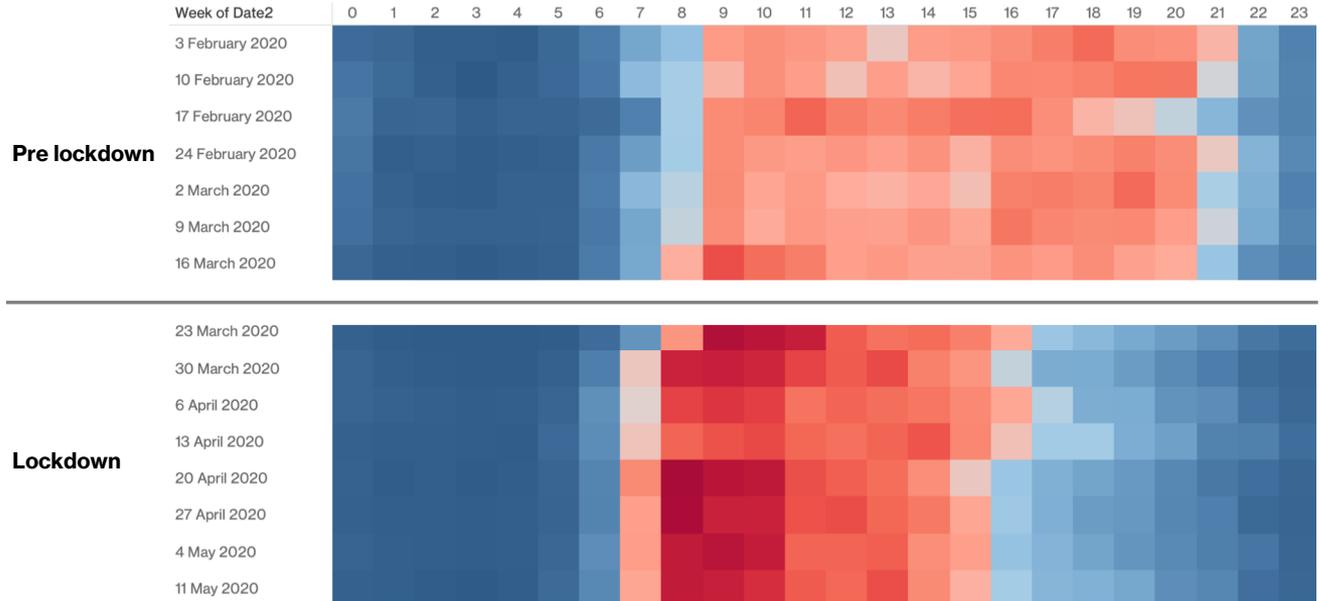
There is a readiness for remote working from an employee perspective

% say their company is equipped for fully remote workforce



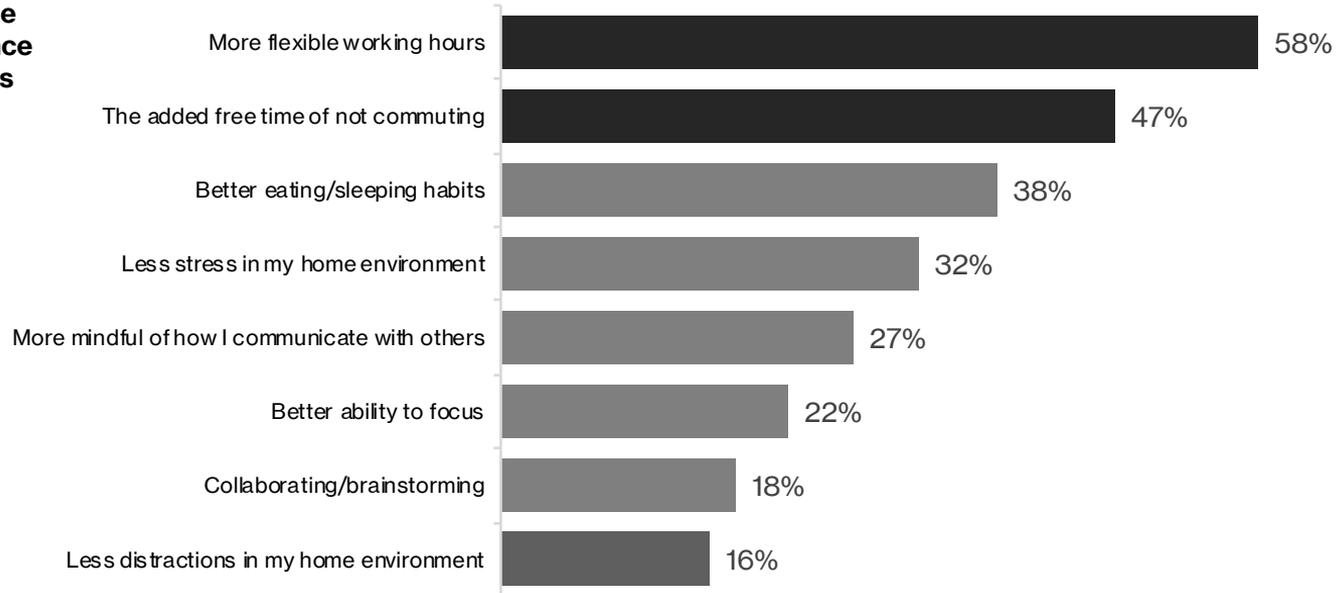
As benefits such as flexible working hours come to the fore

For knowledge workers, no commute, children at home and lunch break has fundamentally changed the working day.



Home working provides employee value

% working from home saying they experience the following benefits



But the business reality paints a different picture

Pre pandemic

10%

is used to having much of its workforce regularly work remotely

40%

had established work from home practices

50%

were unprepared and having to play catch up with significant investments in technology for communication, collaboration and community

Long term successes relies on being able to implement new technology and attract/retain the right talent base.

verizon[✓]
media

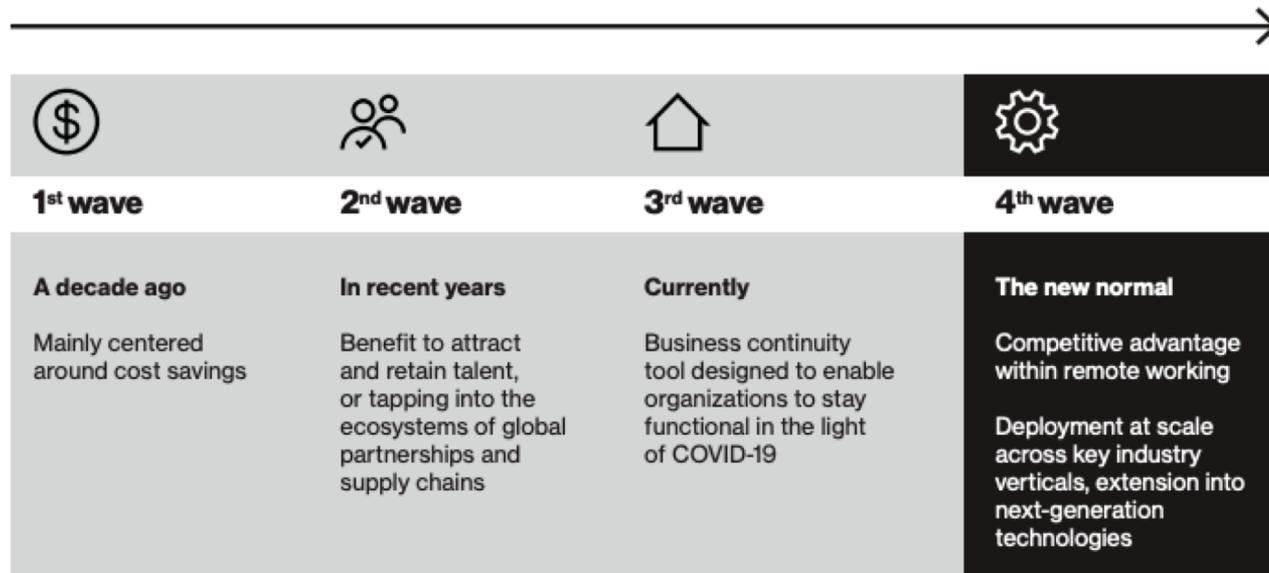
Source: Gartner Inc, business review of companies >\$1billion in revenue
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The 4 stages of remote working adoption

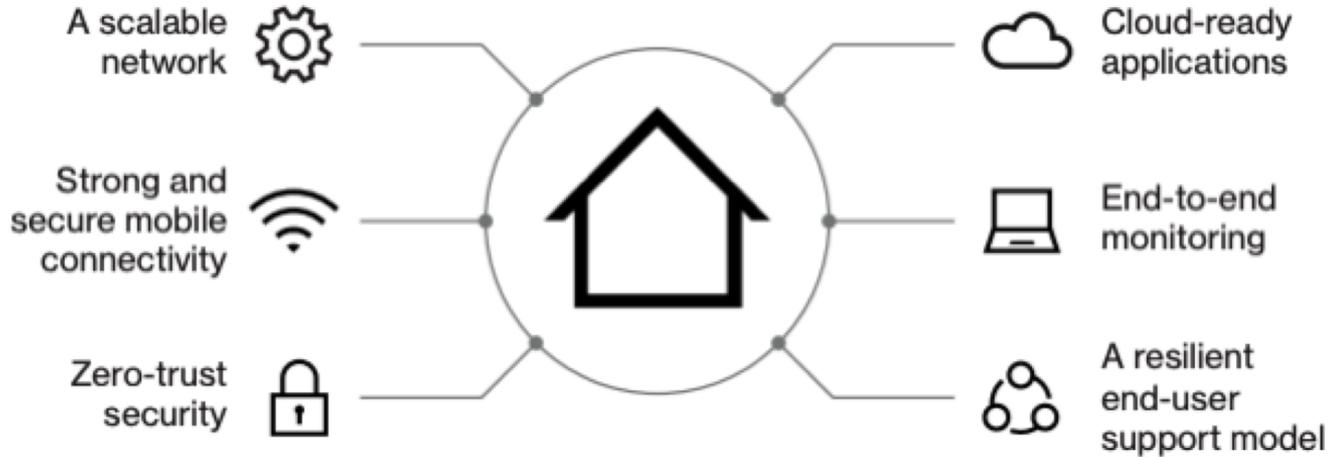
'New normal' 25-30% of the workforce working from home on a multiple-days a week basis by end of 2021

The 4 waves of remote working



Flexible work environments will demand a new focus on tech

Six factors for effective remote work



Power of change: Uber



GPS



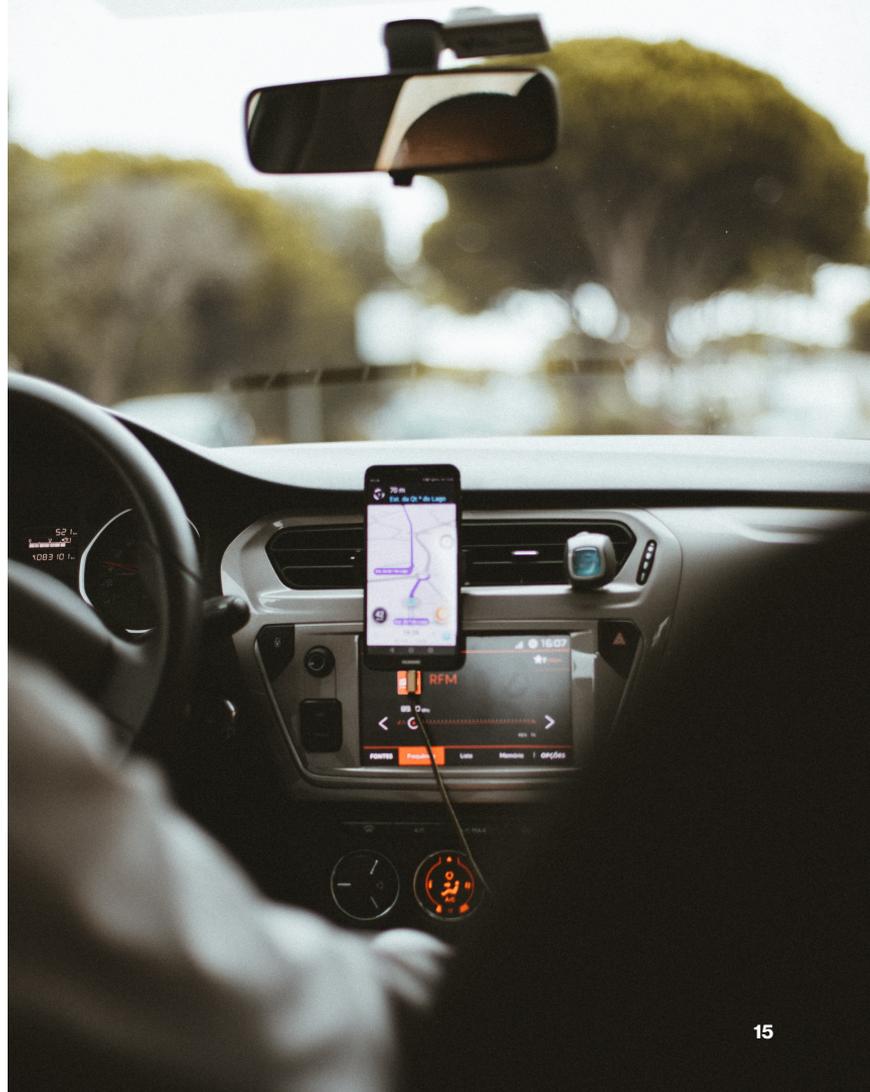
P2P messaging



Mobile payment

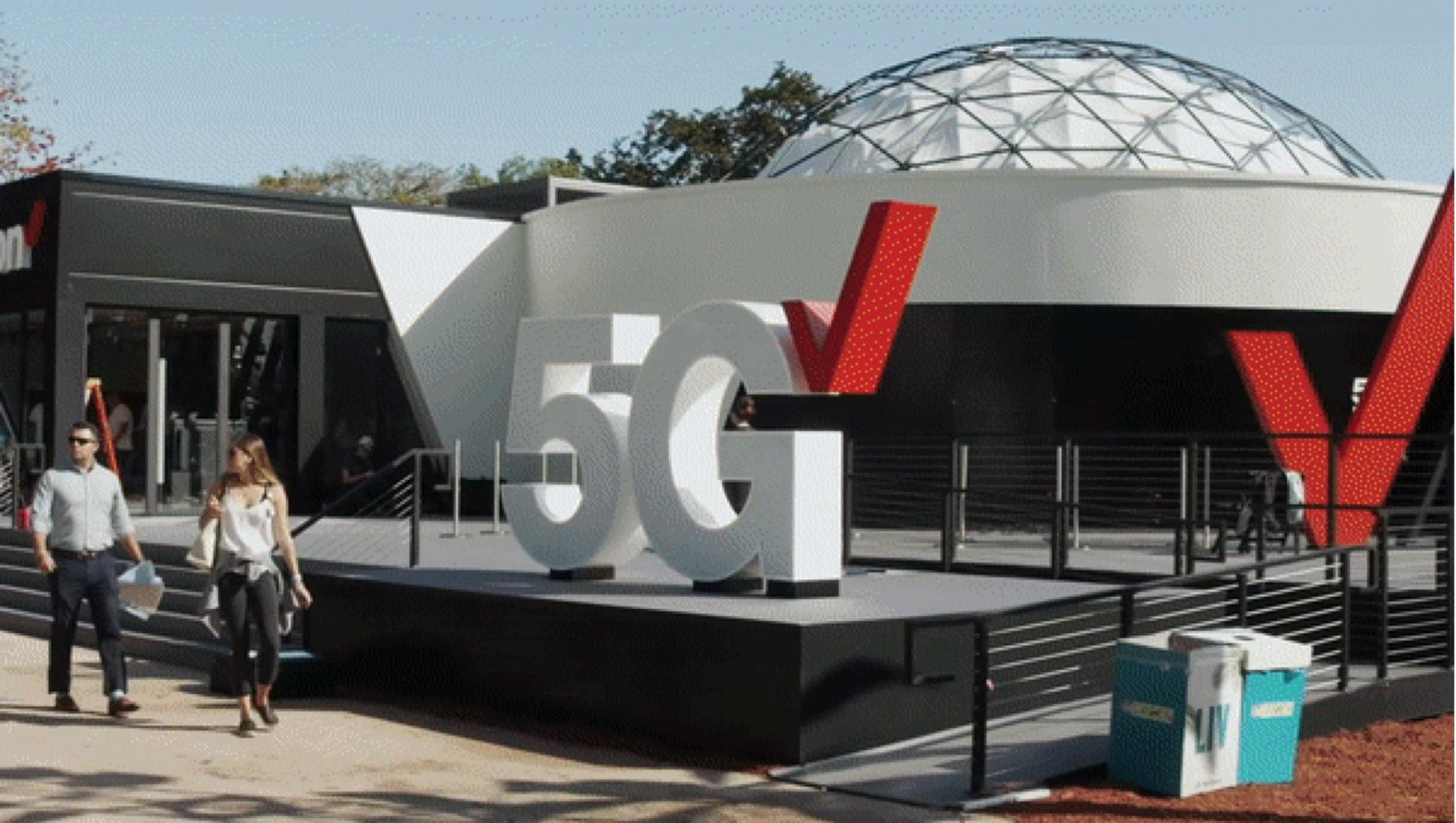


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5G enabling revolutions and evolutions

Across industries	In business operations	In customer experiences
Automotive and Mobility	Safer, more efficient manufacturing, autonomous transport connected to smart cities	Personalized in-car content, related service recommendations, richer, more personalized virtual car shopping experiences.
Entertainment	Re-imagined experiential 'theaters', new, virtual ways of connecting with celebrities	Next-gen AR/VR/MR content/life-like experiences, ultra-fast 4K-8K livestream video
Financial Services	High-frequency trading and market analysis, insights to businesses	Personalized, seamless money management and services
Healthcare	Remote medical services including surgery and physical therapy	Personalized patient insights, care and treatment
CPG/FMCG	Improved manufacturing, supply chain management and packaging	Connected home-to-product recommendation and purchasing
Tech/Telco	Improved manufacturing, supply chain management and packaging	Immersive Computing/Wearables, personalized content thru connected devices
Retail	Improved logistics and delivery coordination	Life-like modeling and virtual shopping (i.e. clothing, home)
Travel	Improved logistics of end-to-end travel needs	Seamless wayfinding, personalized virtual trip planning, destination trials



Business Collaboration

What's next?

It's also a question of ethics



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Accelerator of trends not an originator

The background features a series of glowing red and pink dots arranged in a grid that recedes into the distance, creating a strong sense of perspective and depth. The dots are slightly blurred, giving the impression of light trails or a digital tunnel. The overall color palette is dominated by vibrant reds and pinks against a dark background.

Three guiding principles

- 1. Become adept at adapting**
- 2. Diversify through digital**
- 3. Show you care**

