dynabook

The hybrid
shift

Managing an increasingly remote workforce

Introduction –
## an evolving IT landscape

Mobility is far from a new concept for Europe's IT leaders, but on the back of an unprecedented year for both businesses and employees alike, there has been a seismic shift in the scale at which it must now be delivered. With unmatched numbers of people now working from home – and doing so for the best part of a year or longer – 2020 saw remote working transition from an occasional benefit to an almost permanent reality.

Predicting the future is of course easier said than done, but one noticeable change already beginning to take shape is the expectation that this trend continues. A survey of more than 3,000 workers carried out by **Strathclyde Business School and the University of Manchester** found that fewer than one in ten employees wants to return to the office full time, with the majority (78 per cent) hoping to spend two days per week or fewer there.[1] From a talent retention and acquisition perspective, it is therefore evident that organisations need to deliver true hybrid and remote working to their employees, but there are also a number of benefits this can offer to businesses themselves. Outdated offices can be remodelled, with traditional seating swapped out for additional breakout and meeting space, while maximising hot-desking will also help deliver a safer return to work as social distancing measures likely remain in place for the foreseeable future.

Notably IT decision makers are supportive of this trend, according to our research. They expect over two-thirds (67 per cent) of employees to primarily work either from home or from no fixed location following the pandemic, which has increased from 53 per cent before COVID-19.[2] A similar **Dynabook** survey from 2018 showed this figure to sit at 47 per cent, demonstrating how this has rapidly accelerated over the past year. [3]

Technological innovation has of course paved the way for this reality to be achieved successfully at short notice, at least on the interim basis required over the past 12 months. Now though, organisations are assessing their situation, and the longer-term requirements of building an IT infrastructure which can deliver secure and unhindered hybrid working en masse.

Percentage of employees working/expected to work primarily from home or from no fixed location: Pre Covid-19 vs. Post Covid-19
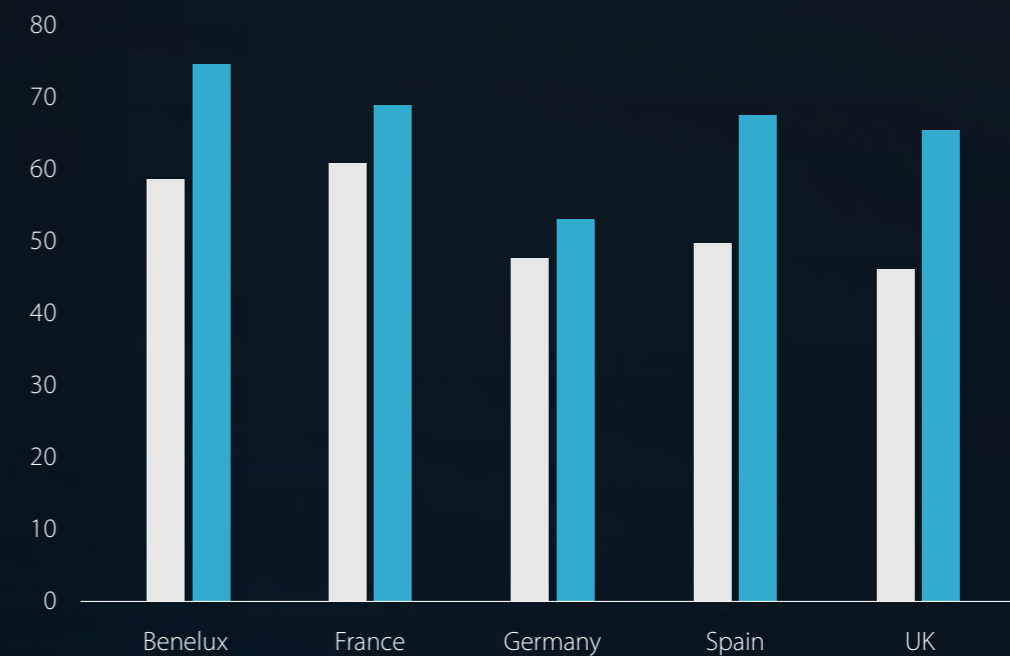
Key

Before COVID-19 pandemic

After COVID-19 pandemic

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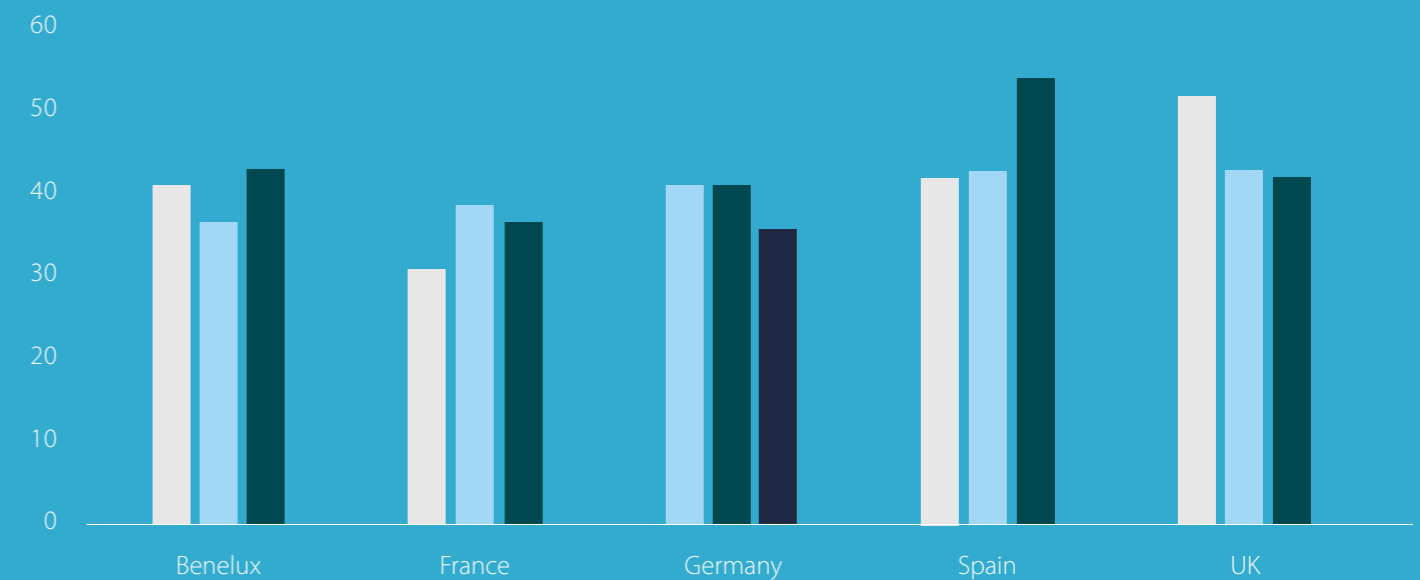
[1] Strathclyde Business School and the University of Manchester, Covid-19 and Working from Home Survey, March 2021
[2] Dynabook, The Hybrid Shift, May 2021
[3] Dynabook, Maximising mobility: Navigating the future IT landscape, Mar. 2018

From temporary fix to long-term transition

Top three IT investment priorities over the next 12 months (%)

In support of this, technology budgets are broadly growing across the region. Almost two-thirds of Europe's IT decision makers (65 per cent) have a greater amount to spend this year than last, while only 10 per cent have seen a decrease in the funds allocated their way.[4]

Key

- Remote IT support
- Cloud-based solutions
- Cyber-security infrastructure
- IT training

Of course, with increased budgets comes increased responsibility to spend that money correctly, and it's no surprise that investing in remote IT support and assistance (50 per cent), cloud-based solutions (50 per cent), and cyber-security infrastructure (49 per cent) are the most common objectives in this new era of hybrid working. This is consistent across all major European markets, though in Germany investing in IT skills and training sits as the third highest priority, with remote IT support fourth. Arguably though, this simply reflects two sides of the same coin, with IT managers seeing a need to both increase the level of support offered centrally, as well as upskill employees at a time when that face-to-face access to said support will be significantly reduced.

Security
threats evolve

The overlap continues with security, where much of this support and training needs to be focused. As technology develops to enable greater mobility, so too do the threats posed by cyber criminals become more advanced.

Findings from **Sophos** revealed that while the number of ransomware attacks decreased over the past year, the average recovery cost of has more than doubled to $1.85 million – and attackers have shifted tactics "from larger scale, generic, automated attacks to more targeted attacks that include human hands-on-keyboard hacking."[5] And ransomware is of course just one example, with **SonicWall's Cyber Threat Report** recording 56.9 million IoT attacks, 5.6 billion malware attacks, and 4.8 trillion intrusion attempts – evidence of the vast and diverse threat facing organisations today.[6]

Such tactics have sought to exploit the unprecedented rise in remote working. As SonicWall explains, "the new work-from-home reality brought about exponentially greater attack surfaces to introduce an untold number of new vectors and infinite opportunities for disruption." As such it is easy to understand why over one-third of Europe's IT leaders rank either network or device security as the most challenging element of their IT infrastructure to manage during the pandemic.[7]

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[5] Sophos, The State of Ransomware 2021, April 2021
[6] SonicWall, Cyber Threat Report 2021, March 2021
[7] Dynabook, The Hybrid Shift, May 2021

Employee needs and **challenges**

Minimising security threats is understandably, therefore, a top priority for companies today. But that is not the only challenge which needs to be remedied in order to enable a successful transition to wide-scale remote and hybrid working. Employee productivity (17 per cent) and collaboration (15 per cent) also combined as the most difficult area to manage for a further third of European IT decision-makers.

Consistent with this fact is that purchasing decisions around cloud platforms and collaboration tools have become more important for 70 and 73 per cent of respondents respectively, as IT teams seek to ensure employees have the right tools to work together seamlessly no matter how far apart they may be in reality. Beyond these immediate priorities, a greater emphasis is also being placed on the likes of automation tools (60 per cent) and wearable devices (59 per cent), which also offer significant benefits around workforce productivity. Yet one technology which sits on the front-line of any IT infrastructure – and supports organisations in overcoming all the challenges highlighted above – is that of their device fleet.

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A renewed focus on hardware

While devices have long been an essential component of any technology infrastructure, their role within that environment has arguably been understated – or even taken for granted – until now. According to our findings, almost three-quarters (74 per cent) of European IT decision makers regard purchasing decisions around laptops as more important now than they did prior to the pandemic.[8]

This is a greater shift in importance than is seen with the likes of cloud platforms – which have undoubtedly maintained a high level of prioritisation for a number of years to support the gradual growth of mobility – as well as with a number of emerging technologies which, prior to the pandemic, may well have been seen as the next transformative step for many organisations. These include automation technology, AI and machine learning, and edge computing solutions.
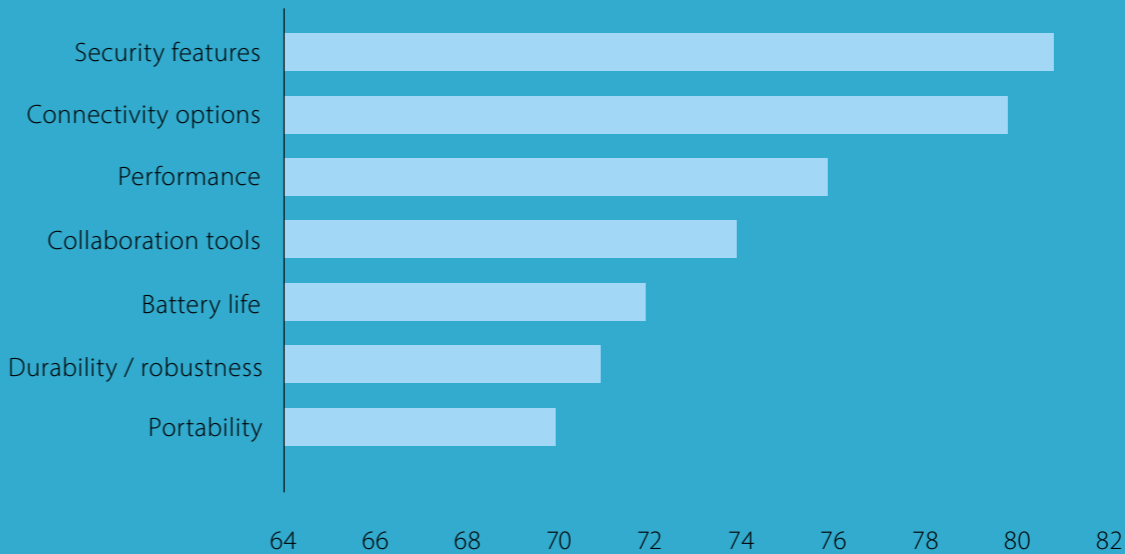
Notably while employees at 86 per cent of organisations are using laptops for remote working, two-thirds (66 per cent) of IT leaders plan to integrate more laptops into their company's infrastructure in the coming 12 months.[9] This could be to transition away from employee-owned hardware, or simply to refresh their existing fleet of business devices. The suggestion, based on these findings, is that either way many IT teams feel their current device portfolio does not meet the standards required for a fully hybrid way of working.

It is no surprise, given what we covered earlier, that security ranks as the most important requirement when purchasing new laptops for one-fifth of organisations – second only to performance (28 per cent), which incorporates processing power, storage, and memory. Yet what the table [above right] tells us is that more than ever, IT decision makers are looking for devices which offer everything and have no weaknesses. While 81 per cent rank security as important, this is closely followed by connectivity options (80 per cent), performance (76 per cent) and collaboration tools (74 per cent) – all of which are regarded as key in powering an efficient 'work from anywhere' culture.[10]

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Features highlighted as important to ITDMs when purchasing new laptops (%)

Feature	
Security features	
Connectivity options	
Performance	
Collaboration tools	
Battery life	
Durability / robustness	
Portability	

(Horizontal bar chart with x-axis values: 64, 66, 68, 70, 72, 74, 76, 78, 80, 82)

[8] Dynabook, The Hybrid Shift, May 2021
[9] Dynabook, The Hybrid Shift, May 2021
[10] Dynabook, The Hybrid Shift, May 2021

Conclusion

In some ways, 2020 can be viewed as a year which caused many organisations to press an IT reset button. A gradual transition towards mobile working was engulfed by an immediate need for it, and proactive plans around infrastructure and the roll-out of new technologies instead became reactive measures to ensure existing IT frameworks could handle this seismic change.

As a result, companies discovered whether these longer-standing technologies were fit for purpose in this new world. According to our research, the answer to that question in many cases was no – meaning greater emphasis has now been placed on upgrading these solutions, be it their cloud stack, device fleet, or security infrastructure. Investment priorities for the coming year demonstrate this, as well as the need for organisations to improve their remote IT support offering as employees continue to adapt to this hybrid shift.

Beyond this though, emerging technologies are very much still on the radar for many companies. Over half of IT decision makers consider purchasing decisions around the likes of edge and AI solutions to be more important now than before the pandemic. While there are more pressing areas to address in the immediate future, we anticipate such technologies to re-emerge towards the latter part of the year once IT infrastructures have caught up with the unprecedented impact of the past 12 months.

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