

July 2001

The Third Nextra eEurope Report

(A Guide to Trends and Opportunities for Small to Medium Sized European Businesses Operating in the New Economy)

**Study of European perceptions
towards remote and flexible working
practices and related technology
issues**

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Welcome Note

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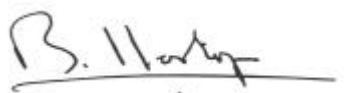
Welcome to the new eEurope Report.

This, the third Nextra eEurope Report, aims to provide a comprehensive insight in to the attitudes of managers in European small and medium sized businesses (SMBs) towards their own working practices, those of their company and the perceived working habits of other countries. It also explores the extent to which European SMBs are embracing the new economy, and in particular, new remote and flexible working technologies.

One of the biggest challenges we all face today is increasing productivity by improving our effectiveness but at the same time, trying to avoid stress and strain and long hours. One of the overriding messages from the research is that the technology employees need to work flexibly is available - and is in demand. It is up to businesses to reassess their companies' needs and implement these technologies.

There are both similarities and marked differences across each country but the encouraging thing is that new technology is changing the way everybody is working. Nextra aims to be at the heart of this change!

We hope you find the results of this research of interest.

A handwritten signature in black ink that reads 'B. Hartop'. The signature is written over a horizontal line.

Introduction

The third Nextra eEurope report aims to provide a comprehensive perspective of the extent to which European small-to-medium-sized businesses (SMBs) are embracing remote and flexible working techniques. As a multi-local communications service provider active in 11 European countries, Nextra is committed to gaining in-depth knowledge of the dynamics of the New Economy in Europe – the result being this report.

The report focuses on the attitudes of European SMBs to both their own working practices, those of their company and working habits in other countries. Results were obtained following over 800 telephone interviews, conducted in eight countries during May and June 2001.

Aims and Objectives

The Nextra research project has five key aims:

1. To monitor the balance between work and private life in Europe
2. To establish the effects of long working hours or non flexible working practices – social, health and mind related
3. To explore existing corporate technology offerings and usage around Europe
4. To highlight employee demands and/or preferences for new technology and the obstacles that they consider to inhibit flexible working
5. To establish which European countries are leading the way in the adoption of remote and/or flexible working

Methodology

In total 800 telephone interviews were completed across eight European countries (detailed below). This equated to 100 interviews per country where strict sampling quotas were imposed to ensure an even spread of interviews by country and by type of business (also detailed below).

Participants were all from middle to senior management levels within their companies with between 50 and 1100 employees in their respective company. The resulting sample base comprised a mix of middle to senior managers across a spread of departments – including IT (information technology), finance, sales & marketing and HR (human resources).

Countries Participating in the Research

UK	Italy
Austria	Norway
Czech Republic	Slovakia
Germany	Sweden

Type of Business Targeted

Technology, Media and Telecommunications (TMT)
Finance
Government and public sector
Other

Native speaking interviewers, based at NFO WorldGroup's central dialling facility in London, completed interviewing in the majority of the countries using Computer Assisted Telephone Interviewing (CATI) software. The interviewing for Czech Republic and Slovakia was completed by NFO AISA based in Prague

All interviews and subsequent collation of results was undertaken by a third party and were conducted between 23 May and 15 June 2001.

** Infratest Burke, is part of NFO Worldwide (NYSE: NFO), the third largest, and fastest growing custom research agency in the world.*

Key Highlights

This section highlights the most significant findings from across Europe. Country-specific information from the eight countries surveyed is set out on page 18.

- Just over half of the respondents (52%) across the eight countries worked more than 45 hours per week in the office. This trend is considerably more prevalent in Germany (74%), Austria (68%) and Czech Republic (65%).
- Most people felt their work invaded their evenings (82%) and then weekends/public holidays (64%). However the large majority (85%) did not mind working these additional hours. Fewer than one in ten (7%) felt that their work life often had a negative impact on their social/family life, with 48% feeling the negative impact only sometimes.
- Sweden had the greatest proportion of respondents who worked from home at least once a week (51% against a European average of 37%). The Czech Republic and Slovakia had the highest amount of remote workers – those working from home most of the time (16% and 21% respectively). Italy (52%), UK (39%) and Austria (35%) stand out as the countries where higher proportions of respondents never work from home.
- The general feeling in the eight countries was that employees were not encouraged to remote/flexi work (43%). This was seen particularly in Italy (70%) and in the Finance and Public sectors (50% each).
- On average, half of the respondents wanted the option to remote/flexi work (52%) – and this was considerably higher in UK (69%), Norway (69%) and Germany (61%). However, 48% of people thought that there would be no change to their family/social life if a more flexible working situation was implemented.
- The main symptom Europeans claimed to have suffered from particularly due to working practices was mental strain or disorder (26%). This was prevalent in Czech Republic (41%) and Slovakia (48%). In Europe, this was followed by a deterioration of health and fitness (13%). Slovaks tended to suffer from all of the symptoms by at least 50% more than the average.
- The perceived rank order of the eight countries in terms of the provision of mobile/flexible working were as follows: Sweden (first), Germany, UK, Norway, Austria, Italy, Czech Republic and Slovakia. However, UK and Italy are perceived to be more advanced than they actually are, when the current extent of flexible working solutions is considered. In reality, UK occupies fifth position and Italy occupies last position. Austria and Slovakia were underestimated, as in reality they were two places higher than the perceived rankings (third and sixth respectively).
- Telecoms/Media/Technology was consistently perceived to be the leading sector in flexi working, with the Public/Government Sector last.
- Increased productivity was judged to be the main benefit that mobile/flexi working could deliver (61%), followed by corporate savings (57%).

- Inadequate corporate IT systems, lack of attention/prioritisation from top management and lack of corporate expenditure (mentioned by 43% of respondents each) were judged to be the main limiting factors restricting the swift implementation of flexible working solutions.
- A breakdown in teamwork was deemed to be the main disadvantage associated with this new way of working (nominated by 38% of respondents), followed by a lack of managerial trust (27%).
- Of the respondents that classified their boss, the majority (34%) classed them as a Cyber Boss (early adopter of remote/flexi working – the out of sight boss), and of these, three in four thought that their Cyber Boss' attitude had a positive impact on productivity. Respondents had a more ambivalent view on the effect that their Big Brother boss (always looking over your shoulder – representing 15% of bosses) had on productivity, as the vote was split equally between a positive/negative/no effect. The smallest proportion of bosses (10%) were classified as the Technophobic Boss (unfamiliar or scared of new technology), and these were seen to have a more negative effect on productivity (42%)

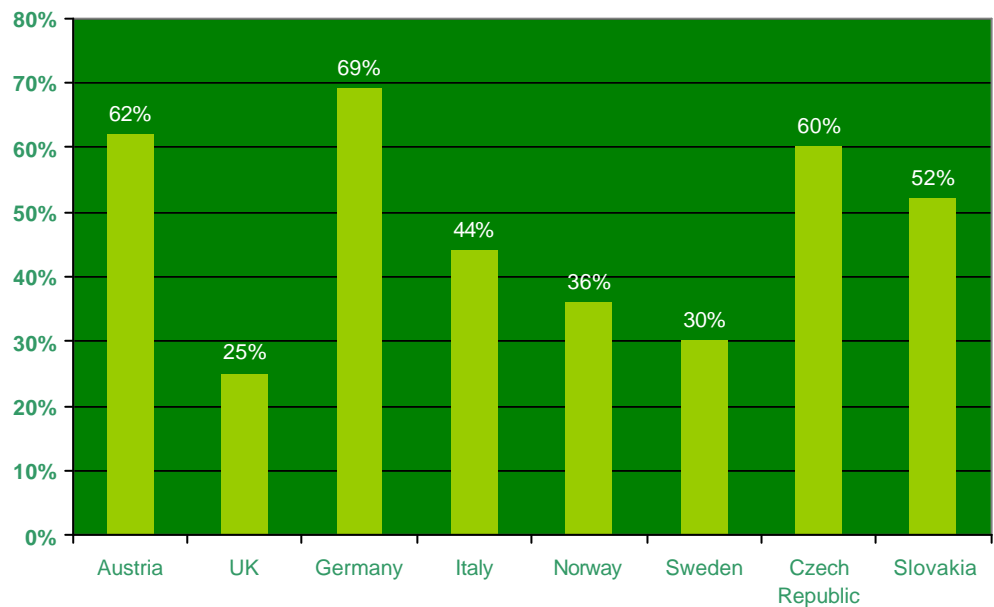
Detailed Findings

Q1 On average, how many hours a week do you spend working in the office (including any overtime)?

- a) Up to 45 hours
- b) Between 45 and 60 hours
- c) Over 60 hours

Just over half the sample (52%) across the eight European countries work 45 hours or more in the office in an average week. This proportion is higher in Germany (74%), Austria (68%) and Czech Republic (65%). The countries where respondents worked fewer hours in the office on average (i.e. under 45 hours per week) are UK (73%), Sweden (65%) and Norway (63%). The Telecoms/Media/Technology (TMT) and Finance sectors have the highest proportion of employees working more than 45 hours (57% and 56% respectively). Senior managers tend to work longer hours in the office with 62% of them working more than 45 hours a week.

Table 1. Respondents working between 45 and 60 hours per week



Q2 Does you work ever encroach/invade on your:

- a) Evenings?
- b) Weekends or public holidays?
- c) Vacations?

Most people felt that their work encroached most on their evenings (82%), and then on weekends and public holidays (64%). This was felt most (as might be expected) in Germany, Austria and Czech Republic, where they tended to work longer hours. However Sweden and Norway, where respondents generally worked fewer hours, also felt that their private lives were invaded by work (more than the European average). This may well be due to the longstanding prevalence of mobile phones in Nordic countries, and the resulting culture of accessibility.

Q3 Do you?

- a) Not mind working additional hours, for example – evenings/weekends
- b) Feel pressurised to work additional hours, for example – evenings/weekends

To a large extent, respondents generally do not mind working these extra hours (85%) – especially in Norway (91%) and Austria (90%). Two exceptions to this are Sweden and Italy, where a fifth of respondents felt pressurised to work additional hours.

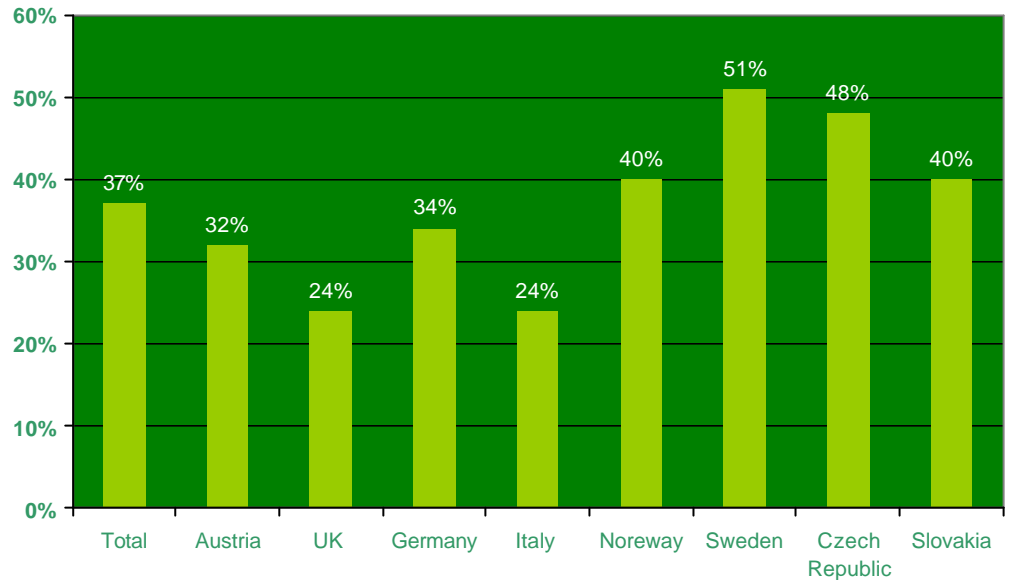
Q4 How often do you work from home?

- a) Never
- b) At least once a week
- c) At least once a month
- d) I am a remote worker (I work from home mostly/all the time)

Of the eight countries, Sweden has the greatest proportion of respondents who work from home at least once a week (51% against a European average of 37%), followed by Czech Republic (48%), Slovakia (40%) and Norway (40%). Czech Republic and Slovakia also have the highest proportion of remote workers - “work from home most of the time” – (16% and 21% respectively). Italy, UK and Austria stand out as the countries where working from home is less common (52%, 39% and 35% respectively never work from home). To summarise: approximately a third of respondents across Europe work from home at least once a week, another third at least once a month or less often, and a quarter never work from home. Those that work longer hours in the office (45 hours or more) are more likely to work from home at least once a week (44%).

Q4 Continued...

Table 2. Respondents who work from home at least once a week



Q5 Does your employer encourage all levels or certain levels within your organisation to remote/flexi-work?

- Yes
- Only senior managers
- Only senior and middle managers
- No one

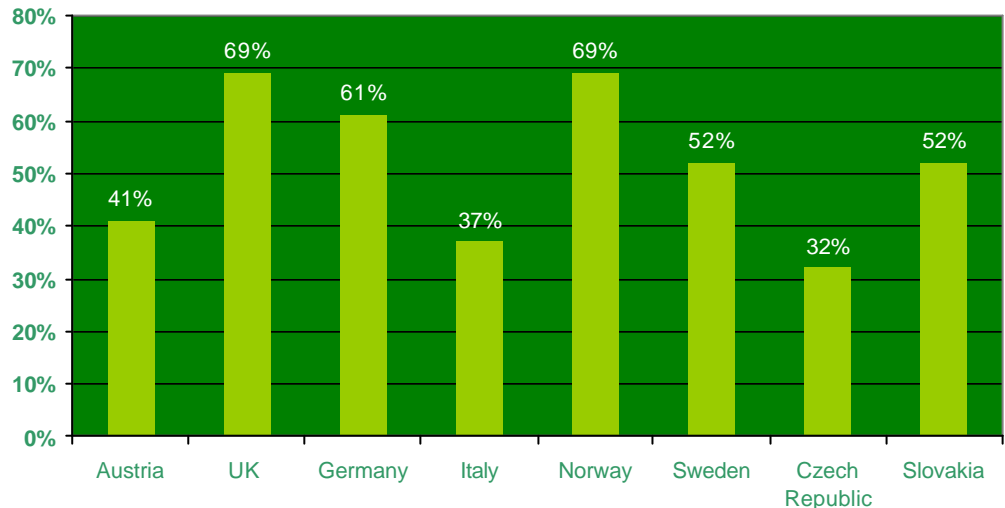
Across Europe the general consensus is that employees are not encouraged to remote/flexi work (43% said nobody in their company was encouraged to flexi work). This is felt especially in Italy (70% of sample), and in the Finance and Public/Government sectors (50% each). It is felt in Sweden and UK particularly (38% and 32%) that remote/flexi working is encouraged at all levels in the company when compared with the European average of 27%. People working in the TMT sector also felt that flexi working was encouraged at all levels (44%).

Q6 Would you like to remote/flexi work?

- a) Yes
- b) Yes but can't
- c) No

Over half of the respondents across Europe (52%) wanted the option to remote/flexi work compared to 30% who did not want the option. Respondents in UK (69%), Norway (69%) and Germany (61%) in particular wanted the option. When those wanting remote working as an option were studied more closely, only 35% of them did not have it implemented at work already (or in the next year).

Table 3. Respondents who would like to remote or flexi-work



Q7 Do you think your work life has a negative impact on your social/family life?

- All of the time
- Most of the time
- Sometimes
- Never

As with the previous question, people generally think (48%) that there would be no change to their family/social life if a more flexible working situation was implemented. Sweden particularly stands out in their views with 61% thinking that there would no change. However this may be because they already have a flexible work life as they came top of the eight countries in terms the businesses who had already implemented flexible working solutions.

Q8 Have you ever suffered from any of the following due to your working practices?

- Illness
- Mental strain or disorder
- Deterioration of health and fitness
- Increased intake of alcohol

The main symptom Europeans claim to suffer from due to working practices was mental strain or disorder (26%) and this is particularly prevalent in Czech Republic and Slovakia (41% and 48% respectively). The next most frequently suffered symptom was a deterioration of health and fitness with 13% of the sample having suffered from it in the past due to their working practices. Austria (19%) and Slovakia (18%) were greater than the norm. Slovaks tend to suffer from all of the symptoms by at least 50% more than the average. However, there was a distinct increase in those that had either suffered mental strain or disorder (40%) and deterioration of health and fitness (31%) amongst those that worked over 60 hours a week. - showing that there is a definite correlation between working long hours and suffering due to working practices.

Q9 Would a more flexible working situation have any impact on your family/social life?

- Yes, a positive impact
- Yes, a negative impact
- No change

Overall people do not often feel that their work life has a negative impact on their social/family life (only 7% felt it had a negative impact all or most of the time), with most people only feeling it sometimes had a negative impact (48%). There is a similar proportion who think work never has a negative impact on their social/family life (44%). This is particularly strong in Italy (70%), Slovakia (54%) and Sweden (53%).

Q10 Has your business implemented mobile/flexible-working solutions for staff?

- Yes
- No
- Plans to before June 2002

If yes, approximately how much will it invest over the next five years?

- a) Up to £5,000
- b) Between £5,000 and £50,000
- c) Between £50,000 and £250,000
- d) Between £250,000 and £1million
- e) Over £1million

Q10 Continued...

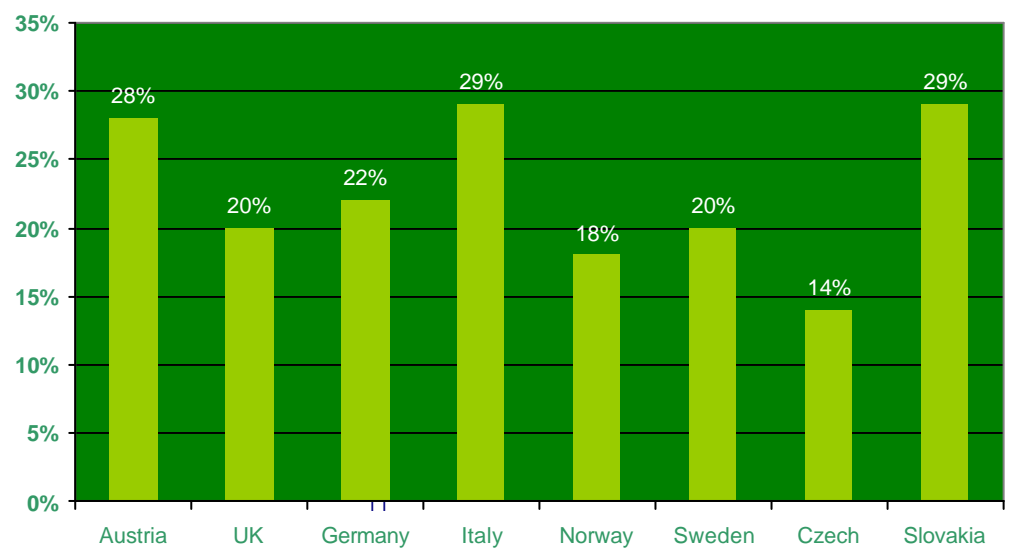
The proportion of businesses in each country that had implemented flexi working solutions for their staff are as follows:

European Average	48%
Sweden	77%
Germany	65%
Austria	63%
Norway	49%
UK	48%
Slovakia	35%
Czech Republic	30%
Italy	14%

TMT is the leading business sector in flexi working solution implementation (63% have it) and the Public/Government Sector is the worst (only 39% have it).

For those who have either implemented it or will do in the next year, most companies will invest less than £50,000 over the next five years (37% of sample). This trend is particularly seen in Czech Republic and Slovakia (46% and 71% respectively).

Table 4. Number of companies planning to invest up to £50,000 on remote and flexi working solutions



Q11 Which mobile/flexible working solutions/equipment are currently available at your company?

- a) Mobile or WAP phone
- b) PDA or other mobile device
- c) Modem laptop
- d) Remote access to corporate email
- e) Remote access to corporate network
- f) Secure access from home (VPN)
- g) Remote application delivery services (Application service provision/ASP)
- h) Leased line(s)

Respondents were asked which mobile/flexible working solutions were available, and which ones they used, the results are shown below. They were also asked which of the solutions that were not already available at work they would like (“wants” column). The rankings for each question are also shown.

Equipment	Available	Use	Wants
Mobile or WAP Phone	1 78%	1 59%	8 7%
Modem Laptop	2 68%	3 41%	5 13%
Remote Access to Corporate email	3 68%	2 45%	6 12%
Remote Access to Corporate Network	4 51%	4 30%	2 18%
Secure Access from home (VPN)	5 33%	5 15%	1 21%
PDA or other Mobile Device	6 31%	6 14%	4 13%
ASP service provision	7 25%	7 11%	3 16%
Leased Lines	8 20%	8 8%	7 10%

Q12 How many of the following do you currently use in your work (as provided by employer)?

- a) Mobile or WAP phone
- b) PDA or other mobile device
- c) Modem laptop
- b) Remote access to corporate email
- e) Remote access to corporate network
- f) Secure access from home (VPN)
- g) Remote application delivery services (Application service provision/ASP)
- h) Leased line(s)

Mobile phones were the most available and also most commonly used piece of equipment (as supplied by employers) across Europe with 59% of our respondents using them. The only exceptions to this are in UK where the most available and most used piece of equipment was the Modem Laptop, and the Czech Republic where the most prevalent was remote access to corporate email. This finding in the UK reflects the fact that recently,

company supplied mobiles were a taxable benefit; many companies therefore simply encouraged staff to get their own phones.

Q13 What mobile/flexible working solutions do you want your employer to provide?

- a) Mobile or WAP phone
- b) PDA or other mobile device
- c) Modem laptop
- d) Remote access to corporate email
- e) Remote access to corporate network
- f) Secure access from home (VPN)
- g) Remote application delivery services (Application service provision/ASP)
- h) Leased line(s)

When respondents were questioned on what they would like their employer to provide (in addition to what is currently available) secure access from home (VPN) was the most requested with 21% of respondents mentioning it, and was closely followed by remote access to the corporate network (19%). This trend was seen in most of the other countries apart from in UK and Germany where the most requested solution was remote application delivery services (ASP). People in the Czech Republic and Slovakia wanted a Modem Laptop (23% and 25% respectively) more than VPN access.

Q14 Which of the following European countries do you consider to be leading the way in the provision of mobile/flexible working solutions

Respondents asked to tick all 1-8 in order (1 indicates leader and 8 indicates most unlikely leader) – top 3 and last

- a) UK
- b) Germany
- c) Italy
- d) Norway
- e) Sweden
- f) Austria
- g) Czech Republic
- h) Slovakia

Most people considered Sweden, Germany and UK to be the leaders (first, second and third respectively) among the eight countries that we interviewed (in the provision of mobile/flexible working). These positions were relatively consistent across the eight countries. The exceptions were in Italy, Sweden, Czech Republic and Slovakia where UK achieved first or second position in the leadership stakes. Germany achieved first place in UK and Slovakia, and Norway reached the top three in UK, Germany and Norway. Interestingly, when looking at each of the positions in each country, the only country that rated themselves higher than their position in the European leader board was Norway who rated themselves second (against fourth position in Europe).

Czech Republic and Slovakia were consistently scored as 7th and 8th positions in the provision of mobile/flexible working in Europe.

Q14 Continued...

When this “perceived” order is compared with the order of countries who have already implemented mobile/flexible working solutions, perception deviates quite considerably from the reality.

	Implemented Mobile Working	Perceived position
European Average	48%	
Sweden	77%	1
Germany	65%	2
Austria	63%	5
Norway	49%	4
UK	48%	3
Slovakia	35%	8
Czech Republic	30%	7
Italy	14%	6

The UK and Italy are perceived to be more advanced in mobile/flexi working than they actually are, as in reality among the people surveyed, UK is fifth but is perceived third, and Italy last by a long way (perceived sixth). Austria is actually close to Germany in terms of implementation, against its perceived fifth position. Slovakia was consistently viewed as being the slowest country to implement this, when in fact it is ahead of Italy and Czech Republic.

Q15 Which business sectors are leading the way in empowering employees through the utilisation of mobile/flexible working solutions?

Respondents were asked to mark 1 to 4 in order (1 indicates leader and 4 indicates most unlikely leader)

- a) Finance
- b) Technology, media and telecoms (TMT)
- d) Business/professional services
- b) Public services and government

There was a consensus view in all countries and all business sectors as to which sectors led the mobile working revolution. TMT was first, followed by Finance and Business/Professional services, and Public Services/Government was ranked last.

Q16 In your opinion, how does mobile/flexible working impact business?

- a) Increased productivity
- b) Staff morale/retention
- c) More effective communications
- d) Corporate savings (through decreased spend on corporate offices etc.)

Q16 Continued

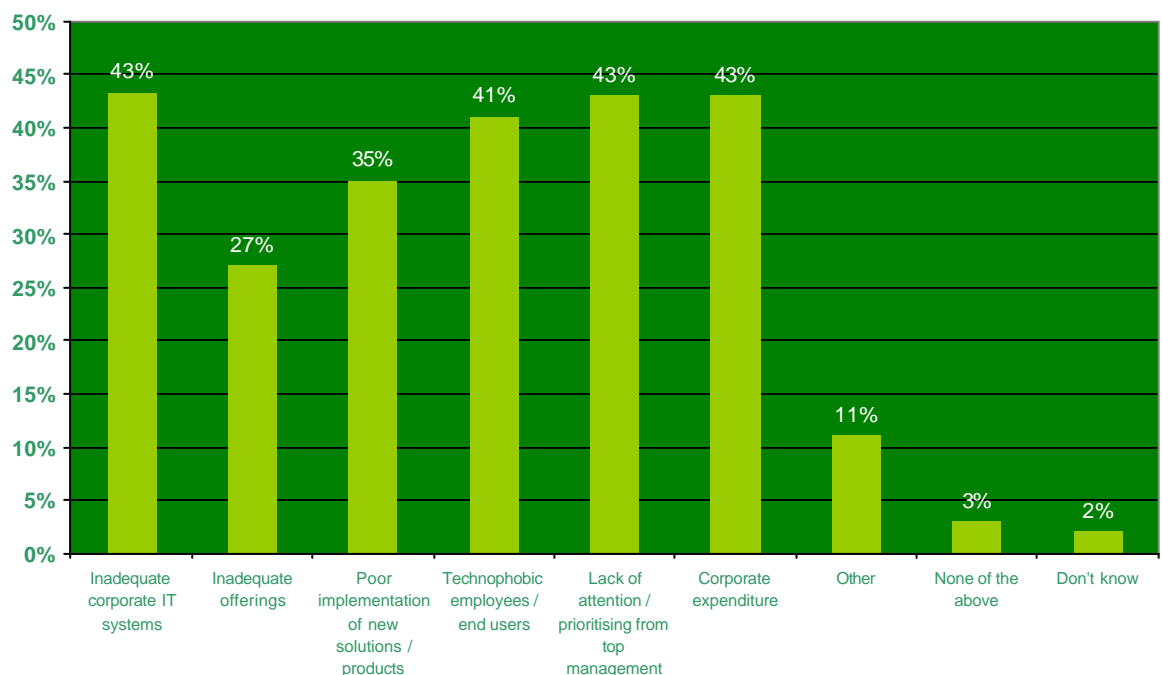
When concentrating on the benefits that mobile/flexi working could deliver, across Europe increased productivity was judged to be the main benefit (61%) followed by corporate savings (57%). However within UK, Germany and Italy, improved staff morale/retention was judged to be more important as this was the main priority in UK (81%) and second in the other two countries (against last priority in Europe). Sweden saw the main benefit being more effective communication (69%), and Czech Republic and Slovakia both judged corporate savings as being the main impact on business.

Q17 In your opinion which barriers restrict the swift implementation of flexible working solutions?

- Inadequate corporate IT systems
- Inadequate offerings
- Poor implementation of new solutions/products
- Technophobic employees/end users
- Lack of attention/prioritising from top management
- Corporate expenditure

The main three limiting factors that restrict the swift implementation of flexible working solutions were: inadequate corporate IT systems, lack of attention/prioritisation from top management and lack of corporate expenditure. There was very little to differentiate between these three factors and the next limiting factor was technophobic employees/end users.

Table 5 – Barriers restricting implementation of flexible working solutions across Europe



Q18 In your opinion, what are the disadvantages associated with new technology for mobile/flexible working?

- a) Perceived lack of customer satisfaction
- b) Breakdown of team work
- c) Lack of managerial trust

When asked what the main disadvantage associated with this new technology would be, a breakdown in teamwork was judged to be the main disadvantage (38%), and this was felt particularly strongly in Italy with 63% nominating this. Lack of managerial trust was judged to be next (27%) and this was seen as being the greatest disadvantage in Czech Republic and Slovakia.

Q19 How would you describe your boss and indicate his/her age range?

- a) Big Brother Boss (always looking over your shoulder) and under 40/ over 40?
- b) Technophobic Boss (unfamiliar or scared of technology) and under 40/ over 40?
- d) Cyber Boss (early adopter of remote and flexible working – the out of sight boss) and under 40/ over 40?
- e) None of the above

When asked to classify their boss as a Big Brother Boss (always looking over your shoulder), Technophobic Boss (unfamiliar or scared of technology) or a Cyber Boss (early adopter of remote/flexible working - the out of sight boss), 34% said their boss was a Cyber Boss, and this was seen particularly in Germany and Austria (51%) and Slovakia (41%). Next came the Big Brother Boss (15%) and then Technophobic Boss (10%). A large proportion of people however did not think that their boss fitted into any of these categories (41%). As might be expected, a higher proportion of bosses under 40 were judged to be Cyber Bosses, and a greater proportion of over 40's were judged to be technophobic.

Q20 If your boss is:

- a) Always looking over you shoulder, what effect if any does it have on you/your team's productivity?
 - i. Positive effect
 - ii. Negative effect
 - iii. No effect
- b) Unfamiliar or scared of technology, what effect if any does it have on you/your team's productivity?
 - iv. Positive effect
 - v. Negative effect
 - vi. No effect

Q20 Continued...

- c) An early adopter of remote working, what effect if any does it have on you/your team's productivity?
- vii. Positive effect
 - viii. Negative effect
 - ix. No effect

Bearing in mind that the cyber boss was the most prevalent out of the three types, most people (77% of those with a Cyber Boss) thought that a Cyber Boss' attitude had a positive effect on productivity, whereas the Technophobic Boss was seen to have a more negative effect (42%). However, half thought they did not have any effect. Big Brother Bosses had a more balanced effect: those with Big Brother Bosses were equally split among those who felt that the effect of this type of boss was positive, negative or neutral.

Country Specific Findings

Austria

Over 90% of Austrian middle and senior managers do not mind substantial cuts in their free time. More than 62% of Austrian managers work between 45 and 60 hours per week – including on their weekends and public holidays – together with Germany, the longest hours among all countries surveyed.

Austrian managers believe that their working habits invade their evenings (93%), weekends (69%) and even holidays (32%). However, the long working hours did not seem to worry the majority of Austrian managers who responded, with only nine per cent feeling pressurised into working the additional hours. The majority of respondents (90%) said that they do not mind their intense working habits.

43% of Austrian respondents stated that working long hours did have a negative influence on their health. In particular, 27% of the respondents claimed to have suffered from mental strain, while 19% complained about lower health and fitness levels. This figure is greater than the European average of 13%.

Czech Republic

After Slovakia, the Czech Republic is the country the most likely to suffer from mental strain or disorder due to working practices in Europe, according to the research. It comes as no surprise therefore that over 65% of Czech managers work more than 45 hours per week. 48% of Czech managers worked from home at least once a week - a figure that is slightly higher than that of Slovakia which stands at 40%. Again, Czechs - like the Slovaks - are much more concerned with having access to corporate networks and modem emails rather than VPNs or ASPs. The main barriers that Czech managers see as preventing more flexible working solutions are lack of corporate expenditure (41%) and technophobic employees and end users (33%). Czech managers are typically over 40 (47%) and are 'Big Brother bosses' (45.3%) who are always looking over their employees' shoulders.

Germany

Europe's most heavily populated country stands out as a nation of Cyber Bosses (51% compared to the European average of 34%). The general feeling in Germany is that employees are pleased with this new breed of boss. 84% stated that working with a Cyber Boss increased their productivity. This is also higher than the European average of 76%. Only two per cent of German managers believe that this new style of virtual management has a negative effect on their work. More Cyber Bosses work in the financial services industry (34%) than in the technology sector (28%).

The report concluded that 65% of those surveyed said that their company provided them with mobile work solutions. 32% of those actively encourage their staff to make use of these options.

Across Europe, Germany ranks only second to Sweden where 77% of employers offered flexible working solutions and more than a third promoted their use across all levels of staff. More than half of German managers regularly work from home and 34% of those surveyed stated that they work from home at least once week.

Italy

The findings for Italy indicate that Italian small to medium businesses (SMBs) are considerably behind their European counterparts in the implementation of mobile working solutions in their businesses. 70% of Italian managers said that their company does not encourage remote or flexible working and over 50% of Italian's never work from home.

It was also revealed that Italian managers work the some of the shortest hours in the office every week – with 44% claiming to work between 45 and 60 hours per week – compared to 69% of Germans. Italian SMB's are also less likely to experience their work encroaching on their evenings, weekends and holidays (41%, 33% and 11% respectively). The research also suggested that Italian managers are prone to suffering from mental strain or disorder (32%) - but two thirds did not feel that their work life had a negative impact on their family and social time

The results also demonstrated that most Italians thought the barriers restricting the swift implementation of remote working were mainly due to the lack of attention and prioritising by top management (44%) and inadequate corporate IT systems (44%). 21% of Italian managers believed that it was due to technophobic employees. Many Italians wanted their organisation to provide them with secure access from home VPN (45%), and only 23% currently had these offered to them (the European average was 33%). It also seems, unsurprisingly that Italians had a low number of Cyber Bosses (12%) compared Germany for instance (50%).

Norway

The research showed that 91% Norwegian managers found that their work encroached on their evenings - far more than other European bosses. However, 91% also said that did not mind working these extra hours and that remote working would not have a negative impact on their social and family time. 78% of Norwegian respondents claimed not to have suffered from any type of mental strain or disorder, deterioration of health and fitness, and increased intake of alcohol. This figure was second only to the UK (90%). It was also determined that many managers in Norway are Cyber Bosses (26%), however it also had a higher percentage of Technophobic Bosses (14%) than other European territories.

82% of Norwegian managers used a mobile phone for work and many had a number of technologies available to them including VPNs (55%), remote access to corporate email (67%) and remote access to their corporate network (62%). Norway cited a lack of corporate expenditure as the main barrier in the implementation of flexible working solutions.

Slovakia

The research indicated that Slovakia is the country the most likely to suffer from mental strain or disorder due to working practices in Europe. But 54% of Slovaks still felt that work did not have a negative impact on their social or family life. Surprisingly, a large proportion of Slovak managers (40%) are working from home at least once a week, despite not having the technology available to do this effectively. Slovaks are much more concerned with having access to corporate networks and modem emails rather than VPNs or ASPs. Slovak managers are typically over 40 (69%) and are 'Cyber bosses' (36%) who are early adopters of remote working.

Sweden

Sweden emerged as the leader in the provision of flexible working solutions with 78% of businesses said that they had implemented remote working solutions within their organisations. The results revealed that Swedish managers worked fewer office hours than their European counterparts, yet 89% still felt that work encroached on their evenings.

The most popular flexible working tool available was the mobile phone (89%) followed by modem laptops (85%) VPNs and remote access to corporate email were also cited as being available (44% and 85% respectively). Despite the availability of flexible working solutions, the Swedes had a small number (22%) of remote or “Cyber Bosses” compared to the rest of Europe (34%).

The results demonstrated that 51% of Swedish managers worked from home at least once a week and that more than one third encouraged employees, at all levels, to work remotely. 26% of managers in Sweden admitted to have suffered from mental strain or disorder due to their working practices. However a further 76% (average 62%) claimed not to have experienced any side affects.

UK

The surveyed revealed that UK employees on average spend less time working in the office than their European counterparts, with 73% of employees working under 45 hours per week. Over one third of UK employees have never worked from home but 69% of those surveyed wish to work remotely.

Forty eight per cent of UK employers have implemented flexible working solutions. This is ahead of Italy, Slovakia and Czech Republic but lower than other countries surveyed. However respondents from other countries believed UK employers to be one of the leading providers of mobile/flexible working solutions – coming third behind Sweden and Germany. This illustrates a significant gap between the perception of UK flexibility and the reality.

Across the UK, the Cyber-boss is emerging as a management model – 36% of UK employees described their boss in this category. Almost 20% of UK respondents chose ASP as the technology they required most.

Notes

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About Nextra UK and Nextra Group

Nextra UK

Nextra is a Business Communications Managed Service Provider. Supplying integration and end-to-end management of the entire IT and Communications infrastructure, Nextra enables UK organisations to exploit the opportunities presented by the Internet.

Nextra is owned by Telenor, one of Europe's leading telecommunications companies. Its UK customer base, of some 4,500 medium to large businesses, includes many of the UK's leading organisations in the private and public sectors.

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About Infratest Burke

Infratest Burke is part of NFO Worldwide (NYSE: NFO), the third largest, and fastest growing custom research agency in the world. Infratest Burke InCom is a specialist unit within the Group, and conducts research exclusively for Telecoms and IT clients. (InCom stands for Information and Communications Technology).

- Operations in 35 countries
- 13,000 staff
- Annual revenues in excess of \$500m
- One fifth derived from work in the Telecoms and IT sectors

