

Remote Work in Europe, 2030



dGen

Whereby

Remote Work in Europe, 2030

October, 2020

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dGen is a not-for-profit think tank based in Berlin, Germany. We focus on how blockchain technology can contribute to a decentralised future in Europe and what this might mean for people, society, private entities, and the public sector over the coming decades.

We're working with a team of researchers exploring how decentralisation will shape our future. Our insight reports focus on specific topics and industries to drive ideas for adoption in Europe. To find out more, please visit us at dgen.org.

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Foreword

Aside from what our current situation might suggest, the sudden arrival of Covid-19 did not create the phenomenon of remote work. It indeed was a catalyst, pushing many of us to work away from the office while using different tools for familiar tasks — but the shift in how we work has been in the making for a while.

As a matter of fact, the plethora of technological advancements put us on a path to international remote work. The industrial revolution and relative political stability contributed to globally connected economies. Digital communication and collaboration tools emerged as the internet grew from static web pages and mailing lists to dynamic applications and cloud computing.



Although it's unclear which future technologies will shape the way the Decentralised Generation will work, we can see an emerging trend in the technology shaping our work now. We're able to access all the files we need because they're hosted on servers, instead of filing cabinets; we can work from our couch because broadband internet allows us to collaborate in documents while live streaming a video conference; we can take our work wherever we want because of expansive WiFi coverage and more powerful, portable devices. With all this change, what will be the impact on society?

Remote work does not only offer employees more freedom and organisations a way to reduce costs, it also offers other opportunities. Already some countries are experimenting with remote work visas to lure virtual office workers, while more companies scrambling for talent in competitive job markets are hiring abroad.

With more people reconsidering where they need to and can live, how will this impact urbanisation? Meanwhile, most employees' rights in Europe are protected by regulations set by country of residence. What implication will this have?

Long after we emerge from this pandemic we will need to ponder these and many more questions as remote work becomes a longer trend.

Jake Stott & Nick Dijkstra

Founding Board, dGen

Whereby



Ingrid Ødegaard
Founder & CPTO, Whereby



Ingrid is the Co-Founder & CPTO of Whereby (formerly appear.in), the privacy-friendly video meeting platform ranked as the #1 easiest to use by business users. Since 2013, Ingrid and her team have been building a product that makes flexible and remote work accessible to everyone. The team lives and breathes remote collaboration, being spread across 30 different locations. Ingrid has been listed as one of Norway's Top Women in Tech, and in 2018 was named "Future Thinker of the Year" in Norway.

Whereby is the easiest way to meet over video. With no app or installs required, and the same meeting link every time, the video meeting platform gives users the freedom to work from anywhere.

Whereby users can invite colleagues, clients and friends to meet over mobile or desktop, simply by sharing a link, which instantly sends guests into a personalised meeting room. There's no registration or downloads required, and the simple UI means that anyone can easily join or host a call with no technical experience needed.

Whereby users can invite colleagues, clients and friends to meet over mobile or desktop, simply by sharing a link.

Built-in features like screen and audio sharing, meeting recording, branded rooms and customisable room links means that users can make the most of their video meetings. While integrations like Trello, Google Docs, and Miro Whiteboard give teams the tools they need to collaborate remotely.

And now, with Whereby's new API product, Whereby Embedded, companies can easily add video meetings to their website or app. With a quick turnaround time and low coding requirements, it's ideal for connecting with consultants, clinicians, teachers, students, sales teams, and other specialists.

dGen: How have you seen remote work and better communication networks contribute to more flexible and productive working environments?

Ingrid: The Whereby team lives and breathes flexible working, and several team members have made a life-changing decision to relocate to a place that has increased their overall happiness and quality of life. We're a global company, so Whereby employees can log on at the hours that work for them, and we do everything we can to provide the tools and software that let them thrive while working remotely.

What steps has Whereby taken to protect user privacy? Why is this so important?

From day one, Whereby was built with privacy in mind, and this has become one of the aspects our customers value the most. Our business model does not rely on widespread collection of data, and we never sell information about users to anyone. We try to minimise the data we collect to only things we need for specific purposes, and try to be open and transparent about what we collect and have self-service features where users can export or delete their data.

Covid-19 has obviously changed the way many people work. What part of these changes would you like to see continue?

In many countries, the majority of office workers are now working from home. We expect and hope this will lead to permanent changes, where employers will offer more flexibility to workers. This can be transformative for people: whether it frees up more time for health, family, side interests or other. It also requires companies to rethink and adapt their processes, tools and communication practices, to build organisational resilience.

We've embraced this as a great opportunity to hire talent from different countries. About half of our team is now based outside of Norway, including the United States, the United Kingdom, the Netherlands, South Africa, Indonesia, Spain and Thailand. I think many companies can benefit from a diverse talent pool out there with the right structures in place. At Whereby we believe that the concept of borderless talent is the greatest lever for diversity, equity and inclusion.

What parts of remote work do you think need better management as we move away from an initial crisis response?

We see that many companies are not familiar with working remotely, so they struggle to collaborate and build a good culture. For us it starts with trust. When you are not sitting side by side, you need to give clear goals and define deliverables, and then empower people to work



independently. It takes continuous effort to build and maintain trust, but it's vital for a strong team culture. Establishing team-wide accountability and measurable goals builds on the trust that the work will get done, regardless of where it happens. It's important to realise that this is a continuous process and managers should help team members understand how their individual contributions fit into the company-wide goals.

At Whereby, we strive to focus on being intentional about building relationships across teams and timezones, continuously cultivating internal knowledge sources, over-communicating and running great meetings.

What impact might remote work opportunities have on free movement and population distribution within the EU?

We see that many people are leaving the big cities, as they realise it's no longer necessary to be located near an office. One example is that the hours spent commuting to the office can be spent with family or hobbies. As a result, a lot of employees have been able to find a better work-life balance.

One of the advantages of Europe vs. Silicon Valley is that there's not one hub, but 15-20 hubs. This means there is a massive talent pool of people from diverse backgrounds, that those recruiting remotely can tap into, All within 1-3 time zones, and easy to travel or relocate to within the EU/EEC.

Could you tell us what's next for Whereby? And how you plan to build on the Remote Work revolution in Europe?

Over the past few years, Whereby has been predicting and championing remote work as something that will change the way businesses operate, and ultimately improve the lives of employees around the world. In 2020, we saw that prediction become a reality, and now our focus is on providing a tool that can help people have better meetings and collaborate as well or better than in an office. We aim to work well or integrate with other widely used tools, such as Slack, Google Docs, Trello and Miro, to enable more collaborative use cases such as workshops and project meetings. We also put a lot of effort into making a more human-focused experience, with calm colours and a design that can give inspiration and energy instead of "meeting fatigue". We're only just getting started and have big plans for the product in 2021.

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[Visit Whereby](#)

Executive Summary

Among many other things, 2020 will be remembered as one of the biggest experiments in working conditions. While many sectors have been crippled and millions of jobs lost, this remote work experiment has largely been successful.

We look forward to how remote work might look a decade from now, and how it could change our societies and lives.

Currently, most of the conversations on remote work focus on what is happening now. We look forward to how remote work might look a decade from now, and how it could change our societies and lives.

City Life

The Industrial Revolution, and subsequent globalisation, led to mass European urbanisation.

European cities, although attractive in many ways, have many disadvantages, including pollution, crowding, stress, and high costs. Jobs continue to be one of the main benefits of city life. Remote work, and the decentralisation of our work, will dramatically change this.

There will be two major impacted areas, outside of our homes:

- The Office

More remote work translates into massive company savings in real estate, driving this trend. How will our cities look, empty of commercial offices?

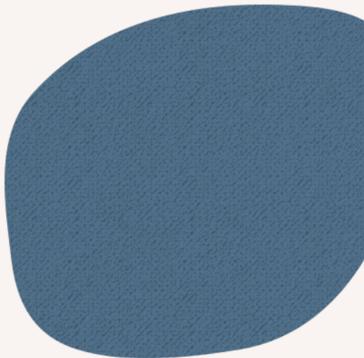
- The Commute

A widespread movement towards home office, even part of the week, will decrease commutes substantially. Cities may become more walking and cycling friendly and inner city public transportation will likely be cut. A rise in first- and last-mile transportation for suburbs will be necessary to counterbalance this.

With the decoupling of mega-cities and job prospects, three areas will see a rise in population:

- Suburbs

Removing daily commutes will make cheaper prices and more space of suburbs more appealing, especially for part-time remote workers. This may correct decades of gentrification that has plagued European cities, but will take careful



For full-time remote workers, the ability to prioritise quality of life over job opportunity will lead to the rise of Lifestyle Cities.

management to protect both the livelihoods of urbanites and amenities in suburbs.

- Lifestyle Cities

For full-time remote workers, the ability to prioritise quality of life over job opportunity will lead to the rise of Lifestyle Cities. Further incentives, such as simple regulations for remote workers, will boost these small cities.

- Rural Areas

Rural Europe's population has been rapidly declining. Renovating local infrastructure to revive local economies and attract new remote residents will become a primary means of maintaining these populations. Remote-First villages will begin to arise around Europe.

Careers

In modern Europe, the majority of work is in the tertiary sector, with a large portion of these jobs well-suited to remote solutions.

With the growth of the internet and affordable software tools, the historical issue to remote work - communication - is removed. Work can happen anywhere with an internet connection.

Removing local restrictions will further impact other two areas of the work sphere, namely:

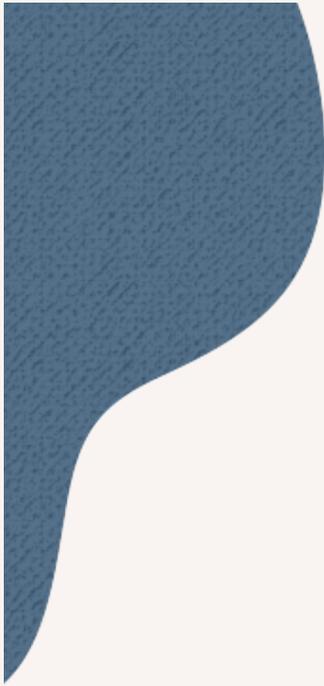
- Hiring Processes

Hiring will open to a global or EU-wide talent pools, increasing the implementation of wider platforms to find candidates. Moreover, companies' possibility to have headquarters in smaller cities might start a reversal of the "brain-drain" process.

- Multi-Job Careers

The deeper flexibility of this new model will drive a push for a more secure contract than that of a freelancer, while still retaining the flexibility of multi-companies careers. A reshaping of workers rights and benefits will be necessary, to ensure common standards, long-term contracts, and consistent rights.

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Social Systems & Rights

The EU has strong values of democracy and long-standing social systems. These are mostly administered at the national level. This poses great concerns and difficulties for remote workers in the form of taxes, pensions, and health insurance.

Along with a shift to greater reliance on remote work, the EU and companies will have to adapt to a decentralised labour force. Although the EU is well-positioned for that, more integrated legislation, greater digitisation, and more flexible understandings of careers are necessary. In turn, European citizens will have wider competition, flexibility and choice.

Further, while Europe is known for strong workers' rights, when an employee is split between two countries, job security is often not guaranteed by either country. Harmonisation of workers' rights across Europe should be a prime concern.

Political participation can also be limited for international remote workers. Remote workers who opt to exercise their right to Freedom of Movement may be locked out of local elections - especially for those who move internationally more often. Remote work may not change strict voting barriers for nations, but should be considered, at least within Europe, given the importance of voting.

Work/Life Balance

2020 was particularly challenging for many workers, with the new remote workforce largely without a suitable home office. That is the main reason why we likely see:

- a revolution in home architecture and home office furniture
- a wider normalisation of home office budgets provided by companies.

Moreover, it is fundamental to take into account the remote work/life balance. The separation between work and private life is more difficult when both happen in the same place. By the end of the decade, there will be clearer rules to protect remote workers from unhealthy working relationships.

Lastly, subsidised childcare or even changing school hours will be needed. Covid-19 has been particularly difficult, with no school in many regions. While this issue should not persist at the current scale, it is important to note that mothers were impacted at a much higher rate. To support remote workers

By the end of the decade, there will be clearer rules to protect remote workers from unhealthy working relationships.

and avoid increasing the gender gap, Europe must account for this specific problem.

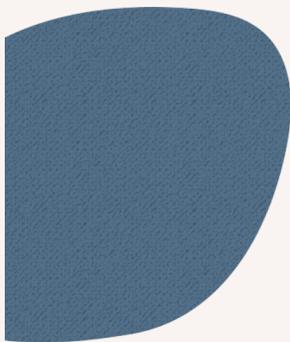
Conclusion & Predictions

This year, remote work is certainly one of the most discussed topics. While some have flourished, Covid-19 also highlighted many issues related to remote workers' rights and conditions. Overall, there is a distinct need for wider harmonisation of social policies.

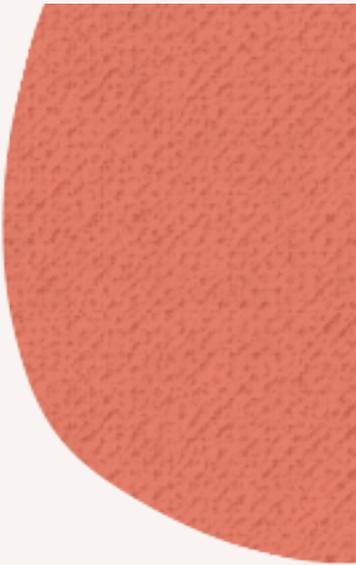
Based on the overview, the next decade will likely bring:

- By 2030, 27% of the workforce in major European cities will have the option to work fully remote or will leave the big cities.
- 10 regions or countries in Europe will offer extra incentives to attract remote workers over the next decade as a primary means of boosting local economies.
- Every country in Europe will start to see Remote-First villages spring up in the next five years.
- By 2030, more than 50% of remote workers will have more than one job and split their time between multiple companies.
- The European Union will launch an opt-in, pan-European pension scheme over the next 10 years.
- Remote workers will have the same rights and access to social benefits as traditional employees by 2025 across the European Union.
- The European Union will launch an opt-in pan-European pension scheme over the next ten years.
- Community co-working spaces focussed on providing childcare will spring up across Europe.

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Introduction



Introduction

Amongst many other things, 2020 will be remembered as the year of "Remote Work". The somewhat tantalising concept of taking your day job and working from anywhere was realised under very different circumstances. It is often advertised as the idea that we can all sit on the beach with our laptops and a fresh coconut to drink from. For most, this couldn't be further from the reality.

dGen and its older sister organisations have been remote-first for the last four years. With around fifty people across twenty countries in our wider company, we have experienced the joys and difficulties of working with a remote team. Rather unexpectedly, this year saw millions of companies globally having to navigate this new paradigm.

As we near the end of 2020, overall the world's biggest ever experiment in working conditions has largely been a success, and not the disaster that many initially anticipated. Humongous organisations did not buckle under the strain, the education system continued to function (albeit with many teething problems), and some organisations flourished. On the other hand, for many businesses that could not "go remote", this year has been more challenging. Many sectors have been crippled and millions of jobs were lost globally.¹ There is hope that Covid-19 will pass quickly, allowing economies to rebuild. However, many more companies have realised that they will have to adjust to continue to make a profit through this crisis.

Although it should be said that remote work is a privilege available to only 35-41% of the workforce on average,² depending on the EU country. In urban areas, knowledge workers (office workers) make up a large percentage of the workforce, but still around 60% work in manual labour, the service sector, transportation, education, or healthcare and can not so easily "go remote".² As much as remote work will revolutionise the lives of many, it is important to remember it will not be possible for everyone. For the majority that can work remote, however, the impact on careers and work opportunities could be significant

While discussions on remote work have flourished, the bulk of conversations focus on what is currently happening. How to be a better manager "now", how to create the best home office "now", what software organisations should use "today". As we can't put the genie back in the bottle, we wanted to write a report that focusses on what remote work might look like a

As we near the end of 2020, the world's biggest ever experiment in working conditions has largely been a success, and not the disaster that many initially anticipated.

decade from now, with a specific focus on remote work in Europe. As people and organisations continue to adjust their operations, we examine how to build the most robust remote working conditions over the next decade. In this, there are many considerations, of which Europe poses particularly interesting possibilities and problems.

Europe's Position

No other region in the world has this tight-knit structure and lenient transnational work opportunities.

Even though in many aspects the Europe Economic Area (EEA) and the European Union (EU) are presented as one entity, there are also many stark contrasts perpetuated by individual nation states and huge differences in terms of culture, politics, language, and economic circumstances. One particular benefit in the EU and several other European nations is "Freedom of Movement". This exists between 31 countries in Europe (soon to be 30 after the UK leaves through Brexit), and provides the freedom of greater choice to European workers who want to live and work from somewhere other than their home nation. It is perhaps the primary reason that remote work in a European context is quite a unique proposition, as no other region in the world has this tight-knit structure and lenient transnational work opportunities.

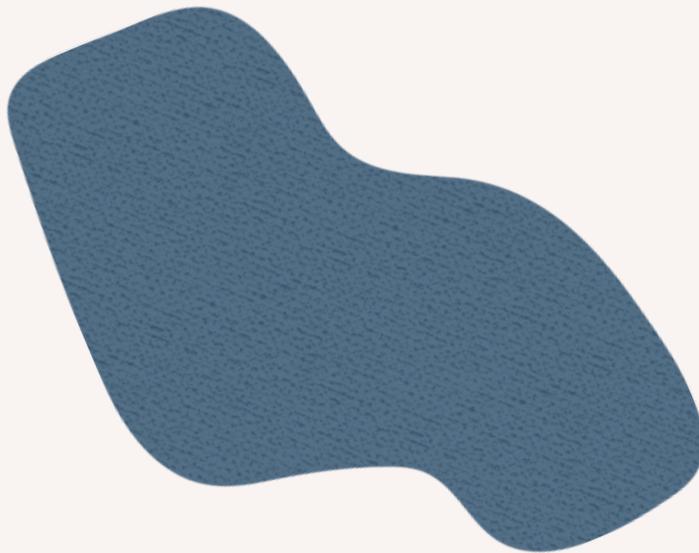
European countries' extensive social benefits also set this region apart globally. In turn, these nations also have some of the highest tax rates. The overall socialist leaning society in Europe makes for an interesting analysis regarding remote work. Much of the discourse is dominated by a US perspective, with a different social system and where Freedom of Movement is not assumed. Given the extensive benefits and importance of the tax scheme to different European nations, though, it is important to consider how taxation and benefits can be incorporated smoothly for international workers in Europe.

Another point to consider is the recent financial crisis. The impact spilled over into a major sovereign debt crisis in Southern Europe. This shook the European project to the core, and even though we have had nearly a decade of economic growth (before the Covid-19 crisis), the financial crisis left lasting effects in some areas. To kick-start economic growth after 2020, more countries might look to attract remote workers with fiscal incentives to boost their economies. Portugal has already moved in this direction, with preferential tax rates for entrepreneurs and expatriates.³ Other countries may follow suit throughout the 2020s.

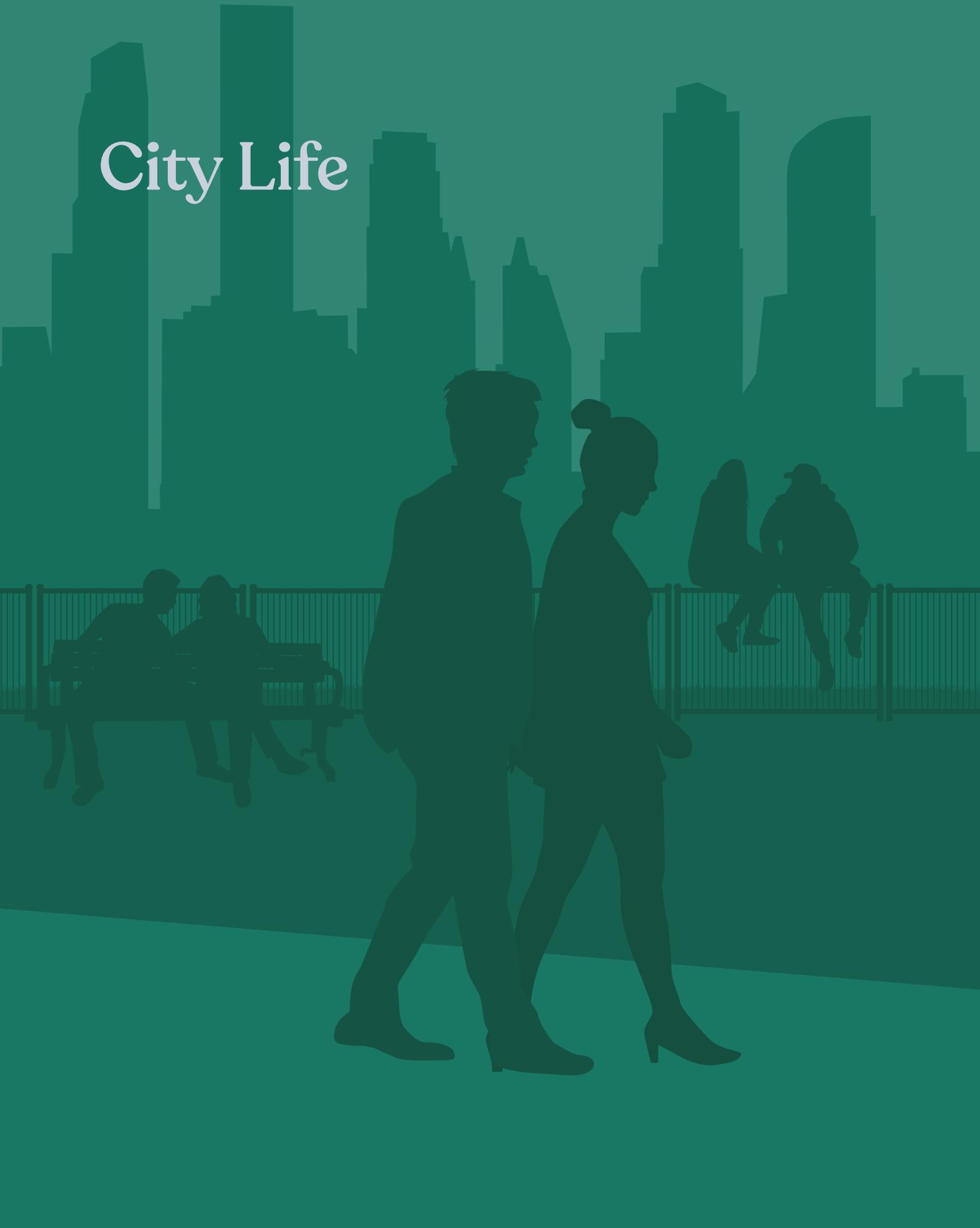
As we look ahead to 2030 and picture ourselves in the world of

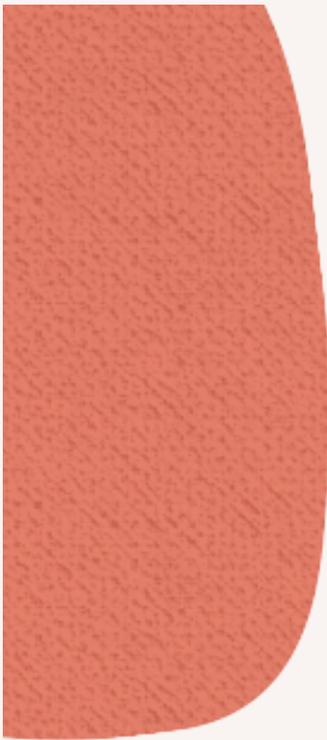
The European Commission has identified that the 'decentralisation of work' is becoming more commonplace, among other trends.⁴

the Decentralised Generation, we aim to decipher how remote work might impact Europe. The Decentralised Generation will no doubt be more connected and less dependent on location as part of their distributed lifestyle. Already, the European Commission has identified that the 'decentralisation of work' is becoming more commonplace, among other trends.⁴ However, it is unclear how job opportunities and freedom of movement may evolve over the next decade with unresolved economic crises and populist agendas in some areas of Europe. In our report we try to cover as many of these areas as possible.



City Life





City Life

Conversations around remote work largely focus on how people carry out their work day-to-day and the tools they use. Over the first half of 2020, this revolutionised for many. However, a step back may reveal even bigger societal shifts on the horizon.

Since the late 1700s and into the 1800s, Europe, followed by most of the rest of the world, industrialised its different economies. The vast wealth from colonisation, the invention of steam powered rail travel (and other machinery), and over time a general democratisation of society and the economy within Europe, lead to a burgeoning middle class. This rising class had no aristocratic background and, now, the technology to build businesses on a whole new scale.

These nascent industrial empires only required one major resource for hyper growth - labour. With these new economies focussed in cities, this led to a drastic shift in population distribution.⁵ The labour force that powered the industrial revolution in Europe was primarily made up of agricultural workers. They were enticed by the chance to earn more money and live a life less dependent on the uncertainty of growing crops. By 1850, Great Britain made history by being the first country with a larger population of city dwellers than people who lived in rural areas.⁶

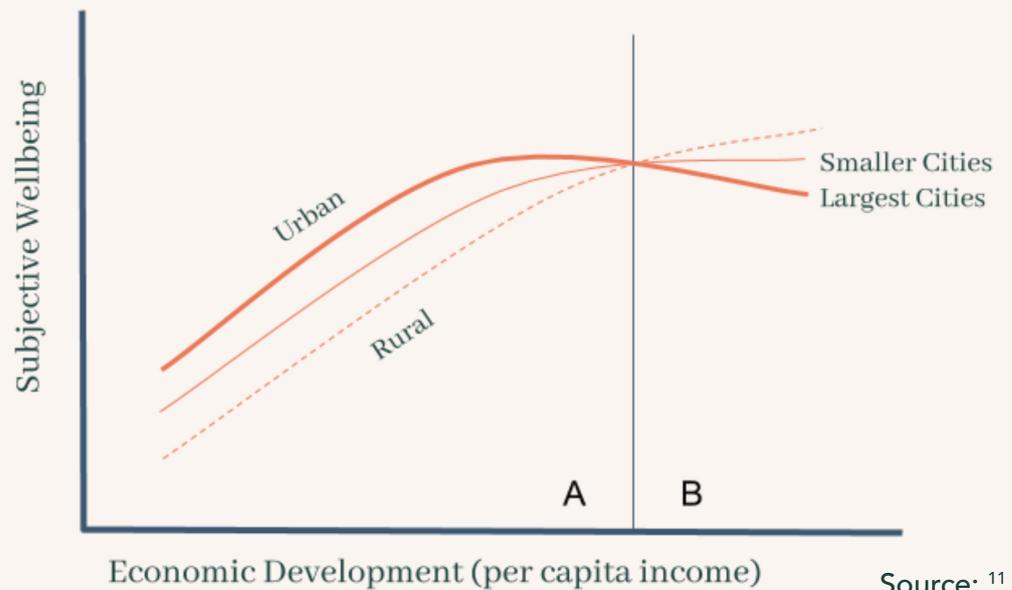
Industrial urbanisation changed work distribution in primary sectors, like agriculture, from 72.1% to 10.25% and the amount of people who lived and worked in cities from 16.70% to 74.05%.^{7 8 9}

Over the next two centuries, industrial urbanisation pushed the amount of workers working in primary sectors, like agriculture, from 72.1% to 10.25% and the amount of people who lived and worked in cities from 16.70% to 74.05%.^{7 8 9} Urbanisation of Europe led to vast mega cities of up to 10 million people, like Paris or London. It contributed to unprecedented wealth creation, wage growth, and major advancements in culture, science, politics, and economics. The egalitarian principles of modern European society are unrecognisable compared to the feudal societies of the pre-industrial era. With the implementation of modern labour laws, the majority of people benefited greatly from industrialisation in terms of health, wealth, opportunity, and life expectancy.¹⁰

But urbanisation, followed by globalisation, also incurred major costs for the wider population residing in Europe. Pollution, stress, commutes, overcrowding, property ownership, and work/life balance mean that cities,^{11 12} although attractive for many reasons, leave their residents with many disadvantages compared to rural or suburban counterparts. Studies reveal the

"urban paradox", which points to the trend of cities raising economic wealth and quality of life to a point, at which crowding and other stressors force quality of life in urban areas below that of suburban or rural, Figure 1.¹¹

Figure1: The Urban Paradox: Subjective well-being and the big city



Source: ¹¹

De-Urbanisation

'We see that many people are leaving the big cities, as they realise it's no longer necessary to be located near an office'.

- Ingrid Ødegaard, Founder & CPTO, Whereby

Just as technical and societal changes led to mass urbanisation, these advances are now enabling remote work. While urbanisation has been growing since the industrial revolution, a greater dependency on remote work could lead to de-urbanisation across Europe, or at least slow this trend.¹¹ It is no longer necessary for large swathes of the workforce to be located in a city centre or to commute to the same office every day. The first half of 2020 showed that remote work is a real possibility for many. Employers and employees alike are realising that one centralised office space may not be the only option at an unprecedented rate. Ingrid Ødegaard, Founder & CPTO of Whereby, noted:

'We see that many people are leaving the big cities, as they realise it's no longer necessary to be located near an office'.

Suburbia's second coming could be one of the biggest contributors to the deurbanisation of cities.¹³ The first rise of suburbia came after a lengthy period of industrial revolution.



The rapid growth of cities left them dirty, overcrowded, and expensive.⁶ Many workers and families wanted to escape the crowded and polluted city centres.

This phenomenon is most associated with 50s and 60s America.¹⁴ However, the rise of suburbia can also be traced back to many major cities in Europe over different time frames. The majority of these shifts can be attributed to exponentially rising housing prices. For instance, both Paris and Amsterdam saw a rapid decline in inner-city populations, while their metropolitan populations increased. In Paris, the urban core shrunk from 3 million in 1954 to 2.2 million today,¹⁵ while the metropolitan area rose from 10 million to 12.5 million over that same period.¹⁵ In 1973 alone, Amsterdam lost 25,000 residents to suburbs.¹⁶

Now, suburbs are largely divided into two groups, with one catering to wealthy, largely white families looking for more space, while others are populated by poorer and often immigrant or communities of colour forced out of expensive city centres. However, for all suburb dwellers, lengthy commutes pose a problem.

'Ideally, when all is said and done, remote workers get to spend less time commuting and more time living'.

- John Eckman, CEO, 10up

For more socio-economically privileged groups, this created a trend of professionals residing within a city during their early career. However, upon marriage or the birth of children, many of these workers with the capital to do so chose to move out of the city for more space.¹⁷ This is still common practice, but has been driven farther back, as many millennials wait longer to start families. Commutes remain an issue, though, with the majority of jobs still located in cities. However, if there was no commute, or the ability to work from anywhere, what percentage of people would still choose to live in a city centre? With the new found flexibility of remote work, we will see the second rise of suburbia and satellite towns. Cheaper housing prices, larger houses, and gardens will entice more people to move out of cities earlier in life,^{13 17} with no dread of that two hour commute. As John Eckman, CEO of 10up, says:

'Ideally, when all is said and done, remote workers get to spend less time commuting and more time living'.

While property prices will definitely motivate this shift away from cities, the backlash will result in rising prices in suburbs. This will in turn stabilise, or even drop, centrally located property prices, for both residential and commercial property. For many major European cities, falling prices may be a healthy correction after decades of exponential property price growth. By the end of the decade, Europe's mega cities might be a lot

more affordable with the exodus of remote workers.

De-Gentrification

The rise of suburbia due to home office and remote work may contribute to the de-gentrification in cities. Gentrification has been a plague on large European cities that swept from district to district, forcing long term residents out in lieu of young, well-paid professionals. This transition leads to higher prices and cultural transformations that are not always fair to the incumbent population, and forces them out. The term was coined in 1964 in reaction to the movement of middle-class families into formerly working-class neighbourhoods in London.¹⁸

The nominal house price and rent for new tenancies rose by over 40% in the last five years.¹⁹

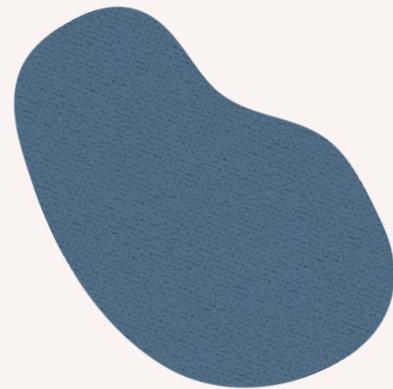
However, gentrification has impacted most major cities, causing housing prices in city centres to be prohibitive to many incumbent residents. In Ireland, for example, the housing market in Dublin has seen rapid price growth, which residents have struggled to keep pace with. The nominal house price and rent for new tenancies rose by over 40% in the last five years.¹⁹

With more work from home opportunities, city centres will become less crowded. Many of the office workers gentrifying neighbourhoods will have more choice on where they live. While not all city residents will decide to move out of the city given the opportunity, this could still significantly slow gentrification across major cities. In the long term, there may even be a reversal of the current trend, leading to de-gentrification - or even in extremes, an urban economic slump - if a majority, or even half, of workers become remote. While this may provide necessary relief for current cities, the exact impacts of this are unclear, as these affluent, young professionals begin to populate smaller cities, suburbs, and rural areas.

The slowing of gentrification is certainly a necessary step to maintain established urban communities, an over correction may be detrimental if it leaves residents with no economic opportunity. A significant shift will mandate careful planning to protect the livelihoods and quality of life of workers who decide to remain urban or do not have the opportunity to "go remote" or move to less populous areas. The exciting shift this could present is much more distributed economic opportunity.

Out of the Office

As workers decide to either go remote or, more likely in the



short term, take more home office, this will have a profound impact on two major aspects many people's jobs:

- the office
- the commute.

'New startups will not go [back] to the old way of setting up a full-fledged office'.

- Liam Martin, Co-Founder & CMO, Time Doctor, Co-Organiser, Running Remote Conference

The early signs of a wider movement away from centralised office space is already apparent. In the wake of the recent work from home mandates spurred by Covid-19, many large companies announced remote work or the ability to work from home multiple days a week will now be standard policy - at least in the short term. A recent study found that 54% of surveyed companies planned to make remote work a permanent option for applicable roles,²⁰ with 35% planning to cut real-estate costs.²⁰ Liam Martin, Co-Founder & CMO of Time Doctor and Co-Organiser of the Running Remote Conference, expects these changes to shape future business choices. Martin expects that:

'New startups will not go [back] to the old way of setting up a full-fledged office. Instead, if there is a need to bring the team together at work, startups will prefer short-term office rentals and coworking spaces'.

This is a huge mentality shift over a short period of time, with enormous implications. Big offices will also see a massive change. For example, if "Office Space A" is suitable for 1000 people, and now 20% of those people work fully remotely and 50% of office-workers work from home two days a week, then on an average day you might only have 640 people in the office, a 36% drop. The need for large offices is decimated by even partial shifts to remote work. Overall, the largest businesses will likely cut back on their office space and smaller offices may not have set offices at all - a change that we expect to maintain into the coming decade.

With a shift to smaller offices already taking place and a 10-15% drop expected as the direct fallout of Covid-19,²¹ over the next decade the drop in demand for commercial office space could lead to price drops as high as 30%.

With the economic effects of Covid-19 already apparent, large corporations are incentivised to cut costs by downsizing office space. However, over the course of the next decade, these numbers could become the norm across all office companies. With a shift to smaller offices already taking place and a 10-15% drop expected as the direct fallout of Covid-19,²¹ over the next decade the drop in demand for commercial office space could lead to price drops as high as 30%. The savings are in the millions of euros per year for some firms, providing plenty of incentive to keep their teams at least partially remote.

The massive savings will translate into either greater returns for



shareholders or reinvested into money making, rather than money draining, costs. Using the "Office space A" example above, a 36% cut to city office spaces will also have a drastic impact on our city make-up. Looking even further across the coming century, this number could be more profound as firms come to grips with hiring globally or remote-first, rendering the office even more obsolete. The German government is even debating a bill to enshrine remote work into law, providing the right for workers to choose home office, either full- or part-time, further cutting into the need for office space.²²

With greater numbers of workers having the opportunity to move to the suburbs and skip the commute, reducing the amount of urban space allocated to offices may also increase the available livable space in city centres. This will further drive down city costs and slow or reverse the effects of gentrification.

The Commute

Less demand for office space in major European cities will have dramatic effects on daily commutes. The first impact is that traffic may decrease substantially.²³ Pictures of cities across the globe while in "lockdown" points to what is possible even in some of the world's biggest and densest metropolises, Figure 2.²³

Figure 2: Road Congestion in Milan, 24 January, 2020 vs. 6 April, 2020



Source: ²³

With less daily car traffic and reduced housing demand in inner cities, walking and cycling will become far more feasible and normalised within cities. With 40% less traffic during the lockdown, bikes became one of the most popular modes of transportation.²⁴ Dropping housing prices and reduced

'[T]he hours spent commuting to the office can be spent with family or hobbies'.

- Ingrid Ødegaard, Founder and CPTO of Whereby

competition for prime locations will enable people to cut their commutes significantly. It may become normal to stay within a 5km radius for much of the week, with longer trips reserved for visiting friends, family, or attending events in different parts of the city or a weekly visit to the office. As Ingrid Ødegaard, Founder and CPTO of Whereby, a remote, video conferencing provider, found that:

'the hours spent commuting to the office can be spent with family or hobbies. As a result, a lot of employees have been able to find a better work-life balance'.

This has given this concept widespread interest in many major cities around the world, including Paris, when the "15-minute city" was part of Mayor Anne Hidalgo's re-election campaign earlier this year.²⁵ The "15-minute city" pushes the idea that residents should be able to reach all essential services with a 15 minute walking or cycling commute.²⁵

Reducing traffic and travel times are necessary steps to reducing dense congestion in cities, and could lead to the rise of vibrant and tight-knit neighbourhood communities in cities that operate almost as individual villages. Work commutes remain one of the most pressing issues to the "15-minute city" campaign, as better city planning cannot account for this.²⁵ However, more remote work opportunities solves this problem. Further, if shorter and more infrequent commutes become normalised, pedestrian-only streets and larger bike lanes, such as the pop-up bike lanes in lockdown,²⁶ could become normalised in these communities, fostering greener and less crowded micro-communities.

Most European cities also have (by global standards) very advanced public transportation systems. Train travel, underground trains, buses, and electric trams in some constellations can be found throughout Europe, and are used by 49% of city dwellers to commute to work.²⁷ As opposed to the US, where only 11% use public transportation on a daily or weekly basis,²⁸ and where many of their cities were built with a "car first" mentality. Therefore, while individual car traffic will be impacted, so will public transportation. With less demand for public transportation systems in Europe spurred by more long-distance work from home or remote work, capacity needs for our public transport networks will drop. This could impact plans to expand and improve these services, and may even mean that many privatised transport networks become unviable, this strain is already showing in London.²⁹ And, Megan Doyle, Business Content Specialist at Next Big Thing AG, points out that:

'We will also see a change in purchasing patterns - for example - with commuters buying tickets when they need them rather than purchasing a monthly ticket'.

- Megan Doyle, Business Content Specialist, Next Big Thing AG

'We will also see a change in purchasing patterns - for example - with commuters buying tickets when they need them rather than purchasing a monthly ticket'.

Therefore, as remote work for part of the week becomes more normalised, enabling people to move to the suburbs, less regular but longer commutes will have to be reckoned with. While there may be a knee-jerk reaction back towards car use for the occasional trip to the office, better long-range public transportation will enter the spotlight. Subsequently, first- and last-mile transportation will see a massive boom in suburban areas, which have previously been underserved.³⁰ All-in-all, these effects - the sharing economy, first- and last-mile transportation, and increased efforts put towards green transportation - give food for thought for many metropolitan areas long-term transportation decisions.

The Rise of Lifestyle Cities

While suburbia has been plagued with less-than-trendy associations, the next few decades may see the rise of lifestyle cities. A lifestyle city is either a current city that people admire for its quality of life, or a new city with potential for a high quality of life, but that until now has lacked a real economy, and therefore has not blossomed.

'What we've seen so far is an increased focus on quality of life'.

- John Eckman, CEO, 10up

With all of the possibilities that the internet, remote work tools, and now, the wider acceptance of working from home bring, people can start thinking more creatively about what "Quality of Life" means to them. Is it living by the beach? Is it living somewhere with more sunshine? Is it having a bigger garden? Is it a place with much better food? Generally speaking, until now, the first question most people asked was, is there a good job or prospects for me and/or my family? If this final question is taken out of the frame because location is no longer a factor, then people can choose where to focus on instead. John Eckman, CEO of 10up, says that what he's 'seen so far is an increased focus on quality of life'.

Within Europe, over the last few decades we have already seen large exoduses of retirees to southern climes on the Mediterranean. Between 2007 and 2017, the number of Britons over the age of 65 residing in Spain doubled, making up 40% of the British foreign residents population.³¹ In Spain, there are just under 6 million foreign nationals,³² attracted by the weather and relatively cheap lifestyle - compared to Northern Europe, where many of these residents hail from. However, retirement has been a primary prerequisite for many Europeans to have so much freedom to choose where they live.

With '[m]unicipal marketing on the cusp of becoming a huge trend[...] a community can help attract and retain flexible professionals by building a local remote work ecosystem'.

- Laurel Farrer, Founder & CEO, Distribute Consulting.

If this superpower is given to any office worker in Europe, what kind of population shifts might we see? Portugal, Sicily, and the Greek Islands could all become economic hotspots, as young high-earning city workers choose to relocate to lifestyle locations that are still in the proximity of a short flight. If those locations provide additional incentives they could become the winners of the remote work revolution over the next decade. With '[m]unicipal marketing on the cusp of becoming a huge trend[...] a community can help attract and retain flexible professionals by building a local remote work ecosystem, complete with coworking spaces' according to Laurel Farrer, Founder & CEO of Distribute Consulting. This could indicate a massive change in how cities boost economies and which areas see growth.

Remote-First Villages

Over the last hundred years, there has been a slow and steady decline in village life across Europe. In 2016, rural populations made up only 28% of Europe's population,³³ a number that was estimated to fall by a further 7.9 million by 2050.³³ As the job market has moved away from agriculture and the majority of young people leave village life to find work in urban areas, some villages have all but disappeared or have disproportionately aging populations.

This, coupled with the desire for many urban dwellers to buy up picturesque holiday homes away from the hustle and bustle, means not only have populations fallen, but prices in these areas can still price-out locals who may want to stay there.³⁴ Across Europe, many villages are dying and their local economies are unsustainable - relying on seasonal tourism and leaving SMEs hit the hardest.³³

Over the next decade, there may be a rebirth of village life.^{35 36} Groups of young professionals seeking greater quality of life or a place to bring up a family, will look away from the cities, suburban areas, and even commuter belts. The total freedom to work from anywhere will enable a move away from heavily developed and populated areas. Some of these villages may not have the transportation links for daily commuters, but may be injected with a new lease of life as Remote-First villages start to spring up.³⁷

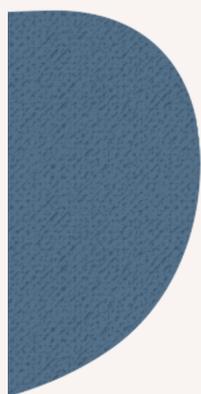
While these villages will not arise overnight, a few may begin to pop-up if a handful of families or groups of friends realise they need certain services and better internet connections. They may band together to buy or build property in one place. We may even see measures like villagers crowdfunding to renovate

'[N]omads tend to prefer locations that other nomads frequent'.

- Jitesh Patil, SEO & Content Specialist, Toggl Plan

a farm, village hall, or even old church into a co-working communal space. Local governments have also begun to catch on, and have invested in infrastructure to support a remote workforce, rather than trying to attract larger companies to revive the economy.³⁵ As Jitesh Patil, SEO & Content Specialist for Toggl Plan, told us, 'nomads tend to prefer locations that other nomads frequent', and can make these communities vibrant and act as an incentive to villages to look to these solutions for economic revival. The Grow Remote movement, started in Ireland, also points to grassroots initiatives across Europe.³⁸

A new economy will be born consisting of remote workers, employed by companies based in the city or internationally, but with the desire for a rural lifestyle.³⁷ As these options develop, services catering to transient workers will also likely arise, where residents can stay for months at a time before moving to another community somewhere else.



Careers



Careers

In modern Europe, career preparation and work make up a huge percentage of life. Over the last 100 years, the end of World War I brought a second major shift in the job market. As the economy of the 18th and 19th centuries evolved away from primarily agricultural work towards the second - manufacturing work - through the 20th century - with a much heavier reliance on tertiary jobs.

With the majority of the population now working these types of jobs and going to an office everyday, there is a huge potential for the rise of remote work.

Today that stands 4.1% agricultural,³⁹ 22.8% manufacturing,⁴⁰ and 70% tertiary jobs.⁴² While primary and secondary jobs both provide a physical product, tertiary jobs provide services.⁴³ While some of these jobs, such as those in the hospitality sector, cannot be made remote, tertiary jobs also make up the bulk of the employment that may go remote. With the majority of the population now working these types of jobs and going to an office everyday, there is a huge potential for the rise of remote work.

The biggest barrier to remote work throughout history has often been communication. Fast, efficient, cheap, and secure communication is needed to operate a successful business. This is not possible by post, and globally was too expensive to be possible through telephone. With the growth of the internet and the almost infinite amount of affordable software tools now available, communication is no longer a problem. For most office jobs, communication with team members and clients enables work to take place, no matter the location. This realisation was cemented through the Covid-19 pandemic.

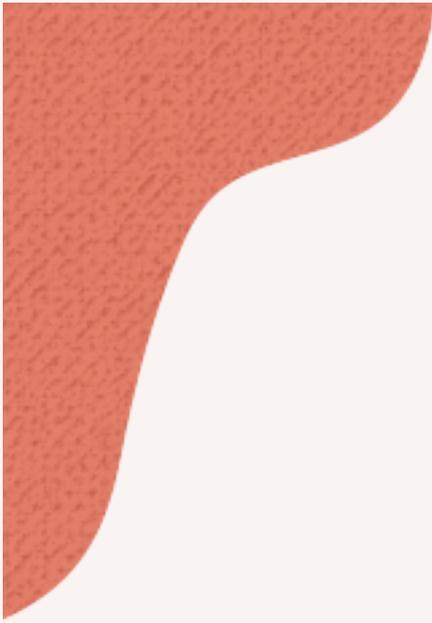
The Global Job Market

'Remote companies have a worldwide talent pool to choose from'.

- Jitesh Patil, SEO & Content Specialist, Toggl Plan,

Hiring has generally been place-based. Pulling from a global job market was primarily isolated to executive roles. Remote work offers not only workers the opportunity to work from anywhere, but can exponentially increase companies hiring pools. 'Remote companies have a worldwide talent pool to choose from', as Jitesh Patil, SEO & Content Specialist at Toggl Plan, put it. The global job market is already available for a whole host of industries and roles, and will only continue to grow.

However, it's still not easy to create a global job advertisement. Patil noted that 'recruitment costs go up' for remote companies, because they 'need to invest in building their online reputation and brand' to recruit currently. While a number of the largest job platforms have added "remote" location



options, these are often still governed by country.⁴⁴ More development is still necessary in this sector to meet demand. Carlos Gómez, Talent Manager at CryptoRecruit, finds that:

‘Founders and CEOs are getting more and more frustrated with recruiters from traditional industries[...], because even after decades of experience, most of them are still struggling to find talent within the new [remote] job market dynamics’.

This calls for a much greater overhaul of our job market. Alternatively, there are some industry specific platforms for global recruiting. For example, developers or designers have been linked to remote work and global platforms for much longer, reporting the highest proportion of remote work in 2018.⁴⁵ Additionally, many platforms cater to freelance work. This is only the beginning of much wider platforms aimed at many industries and roles that will allow hiring managers to find candidates from anywhere in the world.

The global job market will turn both the employment and hiring opportunities on their head.

The global job market will turn both the employment and hiring opportunities on their head. Companies will have the availability to set up headquarters in a small village without necessarily disrupting the town with a workforce of a thousand people. An internet connection will be the primary prerequisite to be able to work for companies based around the world. As competition for jobs and talent increases, this may also affect corporate hierarchies and geographic distribution of managing and executive teams.

With access to a much larger pool of remote jobs across Europe, clear socioeconomic impacts for both cities and rural areas will arise. While it is unclear the exact impact of a large-scale digital workforce, one could be that less young people migrate across Europe looking for work. Recent graduates may simply choose to stay in the areas around their homes and universities.

This is a necessary change, and one the the EU should focus on facilitating, as a recent McKinsey report found that ‘few local labour markets are likely to see employment growth’ and ‘many places in Eastern Europe are facing the double effects of aging and emigration, creating a vicious cycle of shrinking labour supply and declining demand’.⁴⁶ It was noted that ‘[o]ne wild card in these estimates is the sudden shift to remote work’.⁴⁶ As they noted, remote work offers the correction to declining employment opportunities in all but the largest cities. A pan-European, or at least EU-wide, job market and the proper infrastructure, both in the form of internet and



With workers able to live and work from anywhere, the exodus from many European countries, could now start to reverse over the next decade and we may actually see a "brain gain".

regulation, could off-set these trends. Investments in Central and Eastern European countries is particularly important, as some have lagged behind in remote work opportunities.

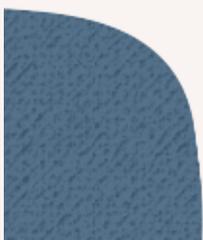
As discussed above, "brain drain", the concept that many young highly-educated people leave a place to find work, is a real problem for many countries in the European Union and a global job market could help reverse that process. With workers now being able to live and work from anywhere, the exodus from many European countries, particularly from Eastern to Western and Southern to Northern Europe,⁴⁷ could now start to reverse over the next decade and we may actually see a "brain gain" - the opposite of a brain drain. Brain gain would tip the scales back towards certain countries as skilled tertiary-sector workers can now operate remotely. This could be a huge boost to local economies and could slowly start to contribute to more social equality across Europe over the rest of the century as location is no longer an inhibitor to high earnings.

Multi-Job Careers

The amount of freelance workers globally is rising,⁴⁸ with the number of freelancers in the EU doubling between 2000 and 2014.⁴⁹ Freelancers are one of the segments with the highest rates of remote work. However, freelancing often means short-term contracts, multiple clients, and a lack of security.⁵⁰ Simultaneously, this can also translate to higher earnings, and is most often undertaken by people with enough experience to obtain regular work and these higher rates.

Multi-job careers will start to become more common as a broader range of workers become remote freelancers, employed by more than one company at the same time. However, at the moment, freelance status locks employees out of many social and legal benefits.⁵¹ Tax systems in many countries will have to adjust to encompass workers with a second, third, or even fourth job. However, given the freedom of both the place and time that people work, working for multiple employers in multiple European countries at the same time will also see a rise. As these models evolve, there may be a movement to enable these structures on more stable contracts, with the same benefits that standard full- or part-time employees see. Sahin Boydas, Founder and CEO of Remoteteams.com, sees this going beyond just a shift from freelancer contracts. Boydas expects a move 'towards having micro companies - where each individual could be their own company, working for multiple firms around the world'. While this may be a more drastic approach, it still addresses the issue

Tax systems in many countries will have to adjust to encompass workers with a second, third, or even fourth job



Delivering on the joint EU legislation found to be necessary will mark an evolution from freelance contracts to a system that guarantees certain workers' rights, and potentially even a more streamlined social benefits payment and collection system.⁵⁰

that the European Agency for Safety and Health at Work realised in 2017 - of making sure the rights of freelancers match those of traditional employees.⁵⁰ Now, in 2020, delivering on joint EU legislation will mark an evolution from freelance contracts to a system that guarantees certain workers' rights, and potentially even a more streamlined social benefits payment and collection system.⁵⁰

Location-Based Salaries

Alongside the new ability to have multi-job remote careers with better employment rights, multiple employers will enable workers to tap into different salaries from across Europe. This could increase competition for jobs, but also for talent. Given the variation in cost of living across Europe,⁵² firms may choose to implement location-based salaries tailored to employee location. This is currently the case in some of the largest remote organisations in the world, like Gitlab.⁵³ They pay their employees on a system based on local living costs and can therefore make sure everyone in the same role has a similar standard of living.

While this ensures that companies benefit from remote work, rather than facing the issue that location-based employment poses - of needing a location in more expensive regions, and therefore having to cover office rent and high employee salaries. However, there are arguments both for and against this model. The obvious argument against is that two employees providing the same service will not earn the same amount.¹³ However, this is also an argument for place-based salaries, as on the flip-side, employees in expensive locations often feel shorted if they have to get by on the same salary as colleagues who reside in cheaper areas.¹³ Further, location-based salaries help ensure that employees don't stay with a company solely because other salaries open to them would be much lower given their location.⁵³

Another situation where location-based salaries are coming into force is through major tech companies in Silicon Valley. Living costs there are some of the highest in the world, and as some tech giants, such as Facebook, look to extend remote work options, workers may look to leave the area.⁵⁴ The issue of other tech companies out-pricing place-based salaries for highly sought after employees who live in relative low-cost areas is another potential flaw.⁵⁴ As Carlos Gómez, a Talent Manager at CryptoRecruit, told us: 'skillful professionals are able to look online for more employment alternatives'. Ideally this will drive '[b]usiness common sense in the form of smart companies taking care of their good employees and good

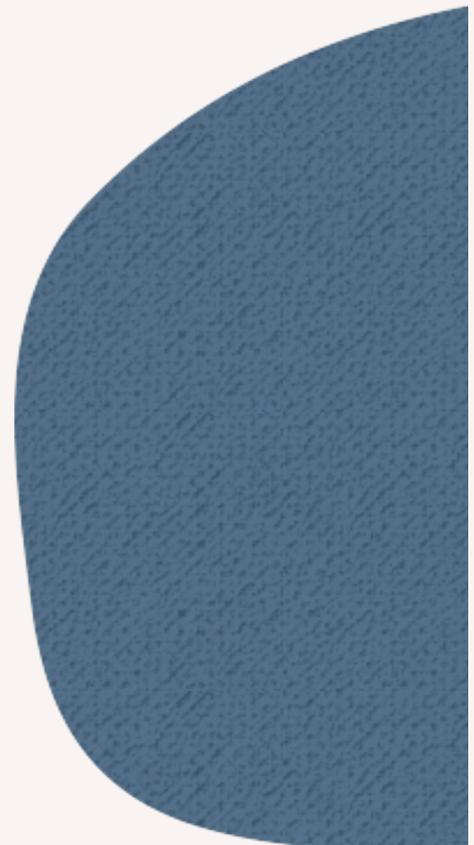


'Equality and transparency are key' in how employers determine salaries to establish a positive environment.

- Darcy Boles, Director of Culture and Innovation, TaxJar

employees negotiating better conditions'. There may, however, be a learning curve. Meanwhile, whether or not place-based salaries present the best solution remains to be seen, the complications of determining salaries for different locations, mean it will still likely increase as a practice. However, Darcy Boles, Director of Culture and Innovation at TaxJar, warns that no matter how an employer decides to determine salaries, '[e]quality and transparency are key' to establishing a positive environment.

Both multi-job careers and location-based salaries create more opportunities for workers and firms in a sustainable manner that neither is massively disadvantaged by being co-located.



Social Systems & Rights





Social Systems & Rights

At the heart of what defines Europe are the strong values of democracy and a long-standing social system. The political system throughout the 19th and 20th century gave greater opportunity and raised the standard of living for many European citizens. This is not to say there aren't many examples of dictatorships, poverty, and human rights breaches, but as a whole, life has become more liveable.

As the majority of the current social and political systems are administered at a national level, even in a more connected Europe, questions remain around pan-European remote work. As touched on in the last two chapters, with "Freedom of Movement" within the European Union, Europe's citizens have the right to move anywhere within the EU.⁵⁵ While it is not feasible for everyone to move to sunnier climes, it will likely become more commonplace with the decoupling of place and work. However, social and political systems will need to evolve with the times and different migration - or lack-thereof - patterns.

Paying Your Way / Being an Employee

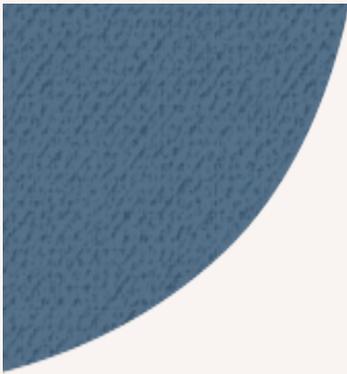
Given that most of these governmental systems and social support were designed with place-based work in mind, issues remain around working remotely. Taxes, pensions, and health insurance are a few examples of areas that were not designed with remote workers in mind, especially international remote workers. These aspects are still approached from a national perspective.⁵⁶ Laurel Farrer, Founder & CEO of Distribute Consulting, says:

'It's critical that regulations catch up to the hypergrowth of remote work as quickly as possible for the protection of our global community'.

A shift to greater reliance on remote work will force European countries and companies to rethink strategy on these topics over the next few decades. For large, multinational corporations, these topics are less of a problem. Quite often these companies have multiple registered offices in different countries. For instance, a French national working for a large French company, may be able to transfer to a small town in Spain with few barriers, if the corporation has an office located in Spain already. Payroll taxes, health insurance, and pension payments can still be accounted for by the company, just from the Spanish location, rather than the French headquarters.

'It's critical that regulations catch up to the hypergrowth of remote work as quickly as possible for the protection of our global community'.

- Laurel Farrer, Founder & CEO, Distribute Consulting



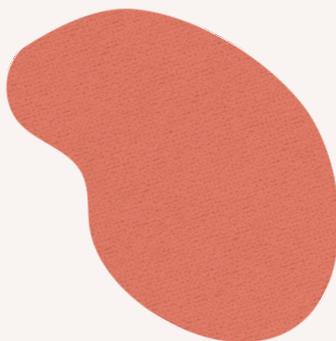
However, what happens if a worker wants to move to a country the corporation does not have a branch in, as is more often the case for much smaller companies?

The problem this poses is two-fold. First, is that opening branches in different countries is expensive and time consuming. Registration is required in each new country, which often comes with a fee.⁵⁷ Second, is that if a company does not have an office in the country an employee wishes to work from, the employee will lose some of these benefits. Filing taxes, paying health insurance, and contributing to an individual pension plan are on the whole the direct responsibility of the employee in this case. Even in Europe, integration is not yet at the necessary level for the remote work revolution.

If remote work policies increase, the necessary regulatory plumbing will be put into place to account for companies with team members in other European countries.

Over the next decade, if remote work policies increase, the necessary regulatory plumbing will be put into place to account for companies with team members in other European countries. Europe is well-positioned for this, with more integrated legislation. While this is harder to accomplish globally, it is a necessary update for remote work at both levels, and entirely possible. Additionally, as mentioned previously, these allowances will need to be implemented for employees with multiple jobs, as well as for employees working transnationally within Europe.

Digital administration at the governmental level is necessary to integrate these systems with a global, or even pan-European, workforce. These systems are still highly fragmented in Europe at the pan-European level. The first step is to manage taxation and payroll completely digitally across Europe. Currently, taxation for employees who work in a country that is separate from their employer is very complex. For many, freelancing positions are simpler, but deprive these employees of certain protections. Double-taxation may apply for others.⁵⁸ A more integrated and clear EU-wide approach would enable both people and businesses to freely move throughout the European Union. Further, faster tax systems will improve working conditions for remote workers and make cash flows more efficient for both businesses and individuals - an important step to ensure that economic security and growth remain.⁵⁹



Many insurance plans already have stipulations for travel, but this is often only for a limited time. However, this needs to be expanded so that international remote workers do not face the current issue of having to pay higher premiums to cover their own insurance. Pan-European and long-term health insurance plans need to be implemented. Already the EU has

implemented a European Health Insurance Card, to grant emergency health services to EU-nationals in any of the 27 EU countries.⁵⁶ This insurance is highly limited though, doesn't guarantee free services, and limits use to three months.⁵⁶ Partnerships between providers in the various European countries need to be expanded to allow both individuals and companies to contribute from their resident countries for full healthcare access.

International remote workers can be locked out of these schemes or forced to pay larger portions themselves.

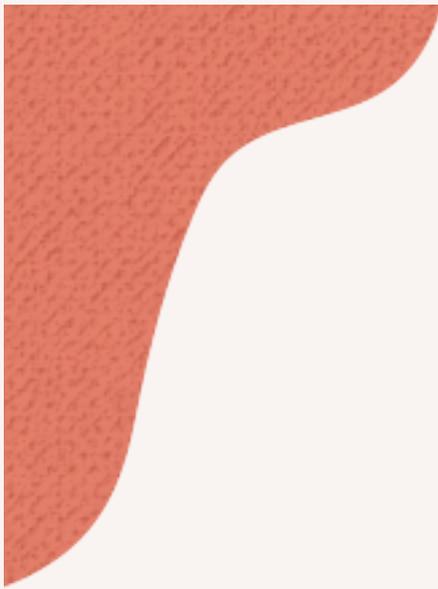
Additionally, greater flexibility around pension schemes is necessary. Pension plans have been a growing crisis for decades.⁶⁰ However, international remote workers can be locked out of these schemes or forced to pay larger portions themselves. This is due to the often minimum contribution periods in some countries. For example, in Germany this is five years of contributions before any pension is granted,⁶¹ and in France it is up to 43 years of contributions to get the full pension payment.⁶² As you can see, if someone split their career over multiple European countries, they could in turn end up missing out with the current national pension systems.

Providing the option to choose from either a national or pan-European pension plan would help to mitigate some of the issues that international workers face. This would also resolve some of the issues that current retirees moving to different countries face, as it gives individuals a greater say in where that money is allocated. European financial institutions also need to evolve to offer more and better pension funds across Europe. With a high level of movement between European countries already, this would enable people to begin planning for their retirement sooner and more efficiently, and ensure that their pension payments go to the country they intend to withdraw it from.⁶³

All of the above developments will not only benefit remote workers and put their opportunities on par with single-nation workers, but brings wider competition, flexibility, and in turn, greater choice, to all European citizens. This is very much in line with the goals of the European project for free movement.

Remote Rights

In line with the discussion on taxes, health insurance, and pensions, European labour laws are also a key issue. Europe is known for strong worker's rights.⁶⁴ These laws grant workers employed by a company located in the same country they reside in certain protections as an employee. These vary country-to-country, but generally speaking, they protect employees from being fired instantaneously.⁶⁵ If an employee is



fired, reasons need to be supplied and are regulated in that there are both valid and invalid reasons. These laws are in place to limit discrimination. In many cases, employers have to provide support to employees they have let go.

Compared to the current rights of an international remote worker, the two are almost entirely opposite. When an employee lives and works in different countries, unless the company has an entity where the worker is located, then the employee's rights are more uncertain. When an employee is split between two countries, for instance if someone lived in Portugal, but worked remotely for a company in Spain, they often are not guaranteed the rights of either country. While the European Parliament has passed minimal labour protections for gig economy employees, these protections are still far less than standard workers receive.⁶⁶

Europe should strive for a continental standard governed by regulations and easily referenced by any European resident.

Over the next decade, the harmonisation of workers rights across Europe should be a prime concern. Europe should strive for a continental standard governed by regulations and easily referenced by any European resident. While Europe has earned a name in worker's rights globally, work on this should not stall. With the improved mobility, the continent also needs to ensure that protections move with these employees, and that as technology enables more international workers in Europe, that they are not cut out of essential protections.

Taking Part

Current political options and participation available to remote workers is another issue. There are many different scenarios that complicate this, from workers from one nation moving either abroad or to different regions within the same country, or for someone to work for an entity based in another country. There is no simple answer here.

If significant percentages of Europe's workforce go remote, then voting becomes a battle between residency and citizenship.

Right now, the majority of people live and work in the same country (and often the same town or city). Current political systems are built around a person being able to vote on the issues that impact them. This is based on location through either local, national, or European government. The same can also apply to workers unions.⁶⁷ However, if significant percentages of Europe's workforce go remote, of which a single location is no longer necessary or even the norm, then voting becomes a battle between residency and citizenship.

Without citizenship, a lengthy process, voting rights are rarely granted, even if residency means that these elections will have the greatest impact on an individual. What happens if a person

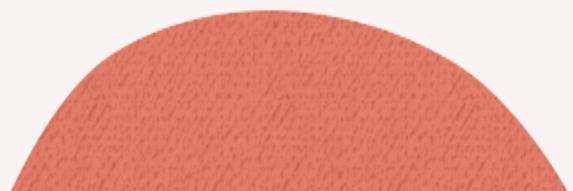


decides they want to live in Hungary for one year, then Croatia, then Italy, followed by a short stint in Cyprus, and then a few years in the Netherlands? The reality is that this will cut the person out of the democratic process of the place they live.⁶⁸ Maybe the person in question favours a more socialist system because they have a family to support or they would vote for another party because they expect that party would set lower tax rates. This is not currently possible.

Remote work may not change voting barriers for nations. However, within Europe the possibility for European citizens to have autonomy over their democracy is a powerful right, and not one that should be ceded lightly. Lowering barriers to vote in national elections for EU citizens is one potential solution. For example, in Germany this is seven or eight years of living in the country and then requires a citizenship test.⁶⁹ But, residents are impacted by local and national elections far before the seven year mark. Further, this means that these people are voting in elections that may not have a large impact on them, based on citizenship in their home country. Going back to worker rights, elections in the employer's country could impact an employee residing in another country as well. Which country would you prefer to vote in? And should stipulations be made to include non-resident and non-citizens impacted by these democracies?

If at some point a sizable percentage are excluded from that or can only vote in a country they have little connection to, it means it's time for change.

This is already an issue across Europe, there are some 3% of Europeans living and working in a country they are not a citizen of.⁷⁰ In Luxembourg, this number is as high as 47.42%,⁷¹ indicating that a large portion of the population is locked out of local democratic processes. As remote work proliferates across industries and the number of Europeans living and working remotely increases, we maybe start to see some countries reevaluate their voting policies. Some European nations have already opened up voting rights earlier, with more rights for foreign nationals from EU member states.⁶⁷ Being part of the democratic process is one thing that makes us European, and if at some point a sizable percentage are excluded from that or can only vote in a country they have little connection to, it means it's time for change.



Home Life Balance



Home Life Balance

Home Office is The Office

For many, having a separate room or space for a home office is a luxury and this has exposed some of these inequalities.

Over the course of 2020, 86% of UK remote workers were made remote as a result of coronavirus.⁷² Many people, understandably, did not have an established office space. 31.8% of survey respondents had to purchase equipment for a “home office”.⁷³ For many, having a separate room or space for a home office is a luxury and this has exposed some of these inequalities. If employees of the 2020s work from home for more than half of their week, then home is the office. Recently, many workers had to take over the kitchen table, create an office space in their living room, or even work from their sofa. None of this is an ideal long term solution, especially in multi-people homes. Most people didn’t choose their living arrangements to accommodate for this new reality. Working from home will have some very interesting second order effects.

With more workers expected or expecting to need to accommodate a working space, there will be extra demand for homes with additional living space, maybe a small side room or quiet space like a garage. One architecture firm reported that only 10-15% of apartment units they were previously building had a dedicated office space.⁷⁴ Going forward, that same firm predicts that this number will jump to 75% to meet demand.⁷⁴

For homes or living situations where this is not feasible, a revolution in home office furniture will be necessary.⁷⁵ This will become the fastest growing furniture category of the next decade, and will be designed to be comfortable, compact, and have the option to be stored away after use or be multi-purpose. Imagine a padded office chair that could be stripped down into a kitchen chair or a kitchen table that flips so it’s an office workspace by day. This is already taking place, as the largest office furniture retailers had to pivot to sell directly to end-customers.⁷⁶

We will also start to see more perks in job advertisements that include a yearly budget for a home office, another change that is already in effect.⁷⁷ It is essential that remote workers have the same comfort and productive environment they would expect from within a co-located office. Darcy Boles, Director of Culture and Innovation at TaxJar, asks:

‘What if you took [office] expenses and distributed them equally to the employees to set up their office spaces and



'Going remote isn't an excuse to save money, it's a way to create a better work life so you can do better business'.

- Darcy Boles, Director of Culture and Innovation, TaxJar

invest in the tools they need to do their job successfully? Going remote isn't an excuse to save money, it's a way to create a better work life so you can do better business'.

Remote Work / Life Balance

One of the biggest and most detrimental developments of remote work and working from home over the Covid-19 lockdown has been the blurring of the lines between work and home life.

Without having a dedicated space to work that is distinct from personal space, such as when you wake up and work all day from your living room, then also relax there in an evening, it is much tougher to define work life balance. Both work and off-work times happen in the same place. Multiple studies have found people are working longer or more stressed about working from home,^{78 79 80} Figure 3.⁷⁹ The impact on non-work life is unsustainable for many.

Figure 3: Working Day and Covid-19



By the end of the decade there will be much clearer rules to protect workers from unhealthy work practices. One solution is to use software that limits access to work emails or other work channels after a certain time. The French government already implemented this in 2017,⁸¹ with Germany also drafting legislation.⁸² It is likely to become more widespread and developed as the problems with remote work are further understood.

Through the pandemic one of the biggest struggles many people reported was their new found need to provide both childcare and work from home at the same time.

Childcare & Work From Home

Through the pandemic one of the biggest struggles many people reported was their new found need to provide both childcare and work from home at the same time. While the fact that many schools have been or are currently closed, it seems unlikely that this will be the case year-after-year.

Although, for younger children or when children come home from school early, the question remains on how to manage childcare and working at the same time. A recent report found that although both parents in heterosexual couples were spending more time parenting, mothers in particular spent more time parenting during work hours and were found to be more responsible for home-schooling.⁸³ Additionally, studies have revealed that even when remote work is possible, women have been more likely to quit or be fired to take over the role of carer during the pandemic.⁸⁴ Women of colour are impacted by this trend at an even higher rate.⁸⁴

While the sudden and drastic lack of childcare should not persist into the next decade, the effects of large amounts of women, especially women of colour, being forced or choosing to leave paid work, will be felt. While remote work was heralded as a great change in closing the gender gap, it appears as though views on childcare and the difficulty with the lack of school and childcare have turned this hope on its head. Mothers and women of colour are specifically at risk in this group. McKinsey recently estimated that the Covid-19 pandemic could set women in the workplace back half a century.⁸⁴

Remote employers will need to account for the particular difficulties that work from home can pose and ensure that their policies support women of colour and mothers. With all of the progress in women's rights and participation in the workforce over the last century, it would be a shame to have this fall due to the rise of remote work. Solutions with subsidised childcare across Europe or the modification of school hours will likely be necessary.

There are a number of other social issues that have already arisen, and will continue to rise to the surface as both employers and employees shift to remote and flexible working policies. All of these changes will take adjustment. But, if handled well, the promise of flexible work for better and happier working conditions could be delivered to the benefit of both employees and employers.

Conclusion & Predictions

Conclusion

Remote work in Europe has clearly taken a quantum leap since the start of 2020. This is an extremely positive development for the millions of people who already operated remotely. However, this year's forced experiment in remote work also brought into the limelight some of the many societal issues and operational challenges.

As its benefits are going to continue to drive this trend, the time to act and iterate through all of these issues is now.

Researchers and governments have taken the opportunity to study and learn about implications of a mass scale movement to remote work. Regulators and businesses have a much greater understanding of where the problems still lie, and in turn, what can be done to fix them. As its benefits are going to continue to drive this trend, the time to act and iterate through all of these issues is now.

Through this report we have tried to touch on some of the discussion points looking beyond the here and now. We must look ahead over the next decade and think about what the consequences are across Europe. We believe the people and policymakers of Europe will step up to the challenges and to close this report, here are our predictions for Remote Work in Europe by 2030:

1. By 2030, 27% of the workforce in major European cities will have the option to work fully remote, impacting both recruitment and migration.

With a large percentage of big companies seeing the benefits of remote work for their balance sheets, we will see optional or part-time remote possibilities as a common perk on job descriptions. Studies seem to show workers prefer this,⁸⁵ and many companies are more than happy to save the money. As Ingrid Ødegaard, Founder & CTPO of Whereby, notes:

'This can be transformative for people: whether it frees up more time for health, family, side interests or other'.

- Ingrid Ødegaard, Founder & CTPO, Whereby

'This can be transformative for people: whether it frees up more time for health, family, side interests or other ...and many companies can benefit from a diverse borderless talent pool'.

2. 10 regions or countries in Europe will offer extra incentives to attract remote workers to move there over the next decade.

We have already seen these incentives offered by Barbados, who want to attract remote workers to replace their tourism focussed economy. With huge unemployment in much of southern Europe caused by Covid-19, many of these places





may turn to high-paid remote workers to restart their economies. 'Municipal marketing' is already a growing trend, as Laurel Farrer, CEO and Founder of Distribute Consulting, noted, and rather than trying to draw larger employers, remote workers may be seen as a less disruptive alternative.

3. Every country in Europe will start to see Remote-First villages spring up in the next five years.

Real-estate in major cities has been increasing at prohibitive rates, to the point that it can be over 300% above the national average.⁸⁶ These prices are completely out of reach for many young professionals, and looking at the far more affordable rural life, groups of these young professionals will team up to find an alternative. Moving to quieter and cheaper village life, supported by remote work will become a major trend, especially for young families.

4. By 2030, more than 50% of remote workers will have more than one job and split their time on multiple companies.

Once the need to go to a single office is taken away, the question that remains is does somebody need to sit on the same task 9-5? Workers will be free to allocate their time better - having mini-careers in multiple companies will be more efficient and lead to higher salaries for most office workers. This will lead a trend to move away from freelancer contracts for these individuals, and the need to establish flexible, multi-career contracts, so that social benefits, taxes, and health insurance can still be accessed through employers for the majority of workers.

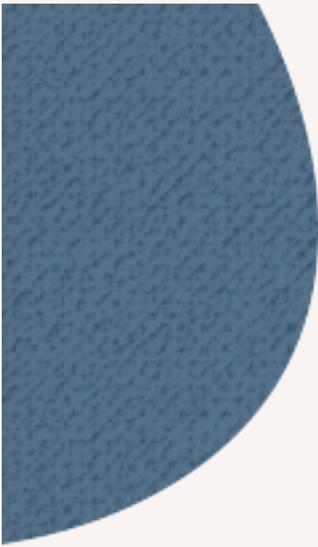
5. The European Union will launch an opt-in pan-European pension scheme over the next ten years.

The current pension system is severely outdated and unsustainable. Europeans who live and work away from home are massively disadvantaged under the current system and as these workers start to approach retirement an alternate scheme needs to be implemented to reflect Europe's multi-country living.

6. Remote workers will have the same rights and access to social benefits as traditional employees by 2025 across the European Union.

European workers rights are at the core of a lot of European policy. The fact that remote work is not included severely

Europeans who live and work away from home are massively disadvantaged under the current system. An alternate scheme needs to be implemented to reflect Europe's multi-country living.



degrades a fair working environment across the EU. This is already being addressed in many different member states, but the EU will need to implement joint legislation.

7. Home Office furniture will be a €100 billion industry by 2030, estimated at €30 billion in Europe now.⁸⁷

As large property developers are already realising, there needs to be office space included in the planning of a new residence. Alongside that there will be an exponential increase in the demand for long-term office furniture by many people who never needed it before, making this a hyper-growth category.

8. Community co-working spaces focused on providing childcare will spring up across Europe.

Childcare will remain a major problem at the heart of remote work. Co-working spaces have seen exponential growth in recent years.⁸⁸ There will be an intersection between these two areas that serves the needs of a growing category. Current co-working spaces will also start to realise that many remote workers value the flexibility of their work, and adjust to accommodate that with flexible memberships or more childcare options in their pricing.

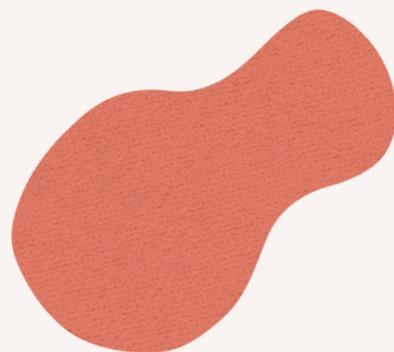
Time will only tell if all eight of these predictions come to fruition, but we are very excited about Europe's prospects over the next decade. As Sara Sutton, CEO & Founder of FlexJobs told us:

'This does appear to be a tipping point, where widespread remote work will remain the norm, in various forms, into the future'.

- Sara Sutton, CEO & Founder, FlexJobs

'This is a profound time for remote work specifically, and flexible work more broadly. This does appear to be a tipping point, where widespread remote work will remain the norm, in various forms, into the future'.

And, we hope to see Europe as the leader in both social policy and workers rights around remote work. This is a topic we will continue to cover the topic over the coming years.



About dGen

After Gen X, characterised by big societal shifts, Gen Y, better known as millennials, and the digital native Gen Z, the decentralised generation will grow up in a future shaped by different dynamics and technological developments. AI, blockchain technology, and IoT will individually bring disruption to many industries, but it's at the crossroads where we expect our whole socio-economic fabric to change.

dGen is a not-for-profit think tank based in Berlin, Germany. We focus on how blockchain technology can contribute to a decentralized future in Europe and what this might mean for people, society, private entities, and the public sector over the coming decades.

Emerging technology focused on decentralising society will shape the next part of the twenty-first century; The dGen will grow up with opportunities for borders to fade and traditional networks to dissipate. Meanwhile, most blockchain developments are still in the early stages; focusing on building solid products and exploring regulatory requirements to create a fertile yet safe environment for companies and investors. The industry is focused on solving the big topics right now, while we encounter a lot of great ideas in the blockchain community about adoption. It's time for those ideas to find a purpose and for the real decision-makers in the world to learn what decentralisation will mean for them.

We're working with a team of researchers exploring how decentralisation will shape our future. Our insight reports focus on specific topics and industries to drive ideas for adoption in Europe. If you're researching how decentralisation is shaping our future, and would like to get involved, please get in touch at dgen.org. dGen is part of Beyond, a venture studio exploring a new world. For more information, go to beyond.ventures.



BEYOND

Interested in Partnering on Our Next Report?

We're looking for partners operating in blockchain ecosystems, corporates, universities, the public sector, and other stakeholders to engage in conversations about how blockchain and emerging tech is shaping the decentralised generation.

We're open for any collaboration on this topic and the broader study of decentralisation in Europe.

You can reach us at partners@dgen.org for more information.

Research Agenda

Digital Democracies: Blockchain for Voting & Governance

Q4 2020

Author

Jake Stott

Before founding dGen, Jake was originally a partner at Signal Ventures, investing in blockchain tech. In late 2017 he founded hype partners to help build and nurture ecosystems for blockchain projects and has worked with many top 100 projects. With these combined experiences he is able to distinguish legitimacy, necessity, and nonsense in this space. Jake is one of the founding partners of Beyond, a venture studio exploring a new world.



Contributors

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One of the founders of dGen and with a rich background in tech, Nick knows how to build organisations from scratch and can transform ideas to great tech products. As a former Product Manager at LiveIntent and Director of Customer Success at Avari he shipped software to a user base over 15% of the US population and has organised 200+ events in Berlin. As the COO at hype partners he is currently helping top-tier blockchain firms strategise their market approach. Nick is one of the founding partners of Beyond, a venture studio exploring a new world.

Maggie Clarendon



Maggie is a writer, researcher, and editor. Trained in literature, critical theory, and gender studies, they are now exploring the ways that technology is changing the landscape of human interaction.

Francisco Rodríguez Berenguer



Francisco has a degree in Business and Law, and is currently working for dGen to communicate its vision for blockchain adoption to an audience of thought leaders in tech companies, corporates, and the public sector as a researcher and marketer.



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