SEAANZ
SMALL ENTERPRISE ASSOCIATION OF
AUSTRALIA & NEW ZEALAND

INSPIRING FUTURE WORKPLACES

AN AUSTRALIA AND NZ SMALL BUSINESS PERSPECTIVE

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FOREWORD

The future of work is an essential topic in a world increasingly characterised by rapid change and growing uncertainty. It is a topic many have written on – often with varying degrees of research to support assertions made and one where the voice of big business and the corporate world typically dominates. What has been missing is the voice of small business, from the sole trader to the aspiring start-ups hidden in backrooms and business incubators to long established family businesses employing a few people. The absence of this voice is a concern and is the very reason for the existence of the International Council for Small Business (ICSB) of which I am the 2018-2019 President. In a busy and crowded world, small businesses are the dominating sector in most economies, so looking at how they may fare in the future is vital for us all.

It is with great pleasure that I introduce and endorse this SEAANZ Business White Paper titled '*Inspiring Future Workplaces: An Australia and NZ Small Business Perspective'* as the beginning of what we hope will be a strengthening and credible voice for small business globally. The need for evidence-based research has never been greater. It is a need that speaks to the very heart of ICSB and SEAANZ as we work to draw together the diverse array of partners involved in the small business ecosystem. This White Paper seeks to bring all these ecosystem partners together, from small business owners and entrepreneurs to educators and researchers to those providing support and advice services, to policy makers, by providing rigorous academic research informed by policy and by practice.

This rigour is imperative for creating shared understanding and meaning for the diverse collaborators in the global small business ecosystem. ICSB and SEAANZ have had long standing and strong roles with these ecosystem partners – but we now want to take this a step further. Much of the research being done in this field is included primarily in the publications of the academic world. This SEAANZ White Paper marks their fourth such publication and seeks to strengthen the bridge between practice, policy, education and research.

Building, maintaining and enhancing these small business ecosystem bridges is crucial from ICSB's perspective if we are all to benefit from the important research being done. Insights and discussions must move from academic publications, lecture theatres and conferences and be shared and debated in the small business ecosystem itself. ICSB and SEAANZ, together and individually, already bridge these worlds. Translating research into impact is a two-way journey, with change coming to academia and the broader small business ecosystem. It is time that the hidden voice of small business becomes the "big voice" it should be! No small business left behind, and more importantly, no small business research left behind!

Geralyn M. Franklin

Geralyn McClure Franklin, Ph.D.
2018-2019 ICSB President
(https://icsb.org/)

EXECUTIVE SUMMARY

This report presents the results of a multi-phase project initially commissioned by the Australian Chamber of Commerce and Industry (ACCI) titled '*Working for Our Future: Modernising Workplace Relations in Australia*' with funding from the federal Department of Employment.

These results have been expanded to draw in, where ever possible, data on New Zealand (NZ), as well. As this NZ component of the report was beyond the scope of the original project, it draws heavily on secondary data sources. We hope to look at funding options in the near future to formally replicate the research fully in NZ and therefore provide more in-depth comparisons between both countries.

The first stage of this report presents a review of the international literature relating to the future of work overall and within this, the future of small business. The literature reviewed covers over 130 academic research papers and selected "grey" literature from government and industry over the time 1984 to 2017.

The second stage of the report provides an analysis of current relevant data sources available from the Australian Bureau of Statistics, the Australian Fair Work Commission and the Ministry of Business, Innovation and Employment (NZ).

Stage three introduces a qualitative dimension with data from focus groups and interviews with small business owners to allow exploration as to views of real business owners.

Stage four provides for a large-scale view which draws on a survey of employers and employees (at this a stage limited to Australian states and territories), and covering all industries and firms of all sizes.

Stage five rounds out the report with a series of case study vignettes of small business owners to enhance the richness and depth through the addition of detailed individual perspectives.

THE FUTURE OF WORK AND THE SME CHALLENGE

Among the key factors shaping the future of the Australian and NZ workplace are: globalisation; technology; demographic change of the workforce; societal attitudes; environmental issues; and government policy.

The economies of both nations are open to global competition and small businesses will need to adjust to this in order to survive.

Technology will be both a creator of new work opportunities and enhancer of worker productivity. For the small business sector in particular there is the chance that technology may level the playing field in terms of the ability to compete with larger firms. However, it will also disrupt many existing industries, replace a high proportion of current jobs, and change the nature of the workplace in relation to time and place.

Future employment will most likely depend on workers being well-educated, skilled, globally oriented, good at problem solving, creative and innovative, as well as confident in their use of technology. Attracting, maintaining and retaining such a workforce poses very specific challenges for small businesses, particularly in terms of offering competitive salaries and financial incentives.

Government policy and regulation will also need to adapt to these forces and assist organisations and their employees to adjust to change. Regulations will need to be more carefully targeted towards a workplace that will require higher levels of flexibility and mobility of the workforce. A key challenge is to ensure that regulation does not simply treat small businesses as 'little big businesses'.

This challenge is particularly important in light of the increasing proportion of "nano" enterprises - comprised of individual self-employed workers, plus small micro-businesses in both Australia and NZ. These businesses will not be best served by an industrial relations system designed to address an adversarial model of bosses and workers.

We conclude with recommendations that focus on the role of Government policy and regulation as one of facilitation – working in partnership with small business employers and employees to help shape their future as productive and globally competitive workplaces.

FACING FUTURE SHOCK THE BIG PICTURE OF CHANGE

A review of the wide array of literature on the future of work suggests that the existing forces shaping the small business sectors of both Australia and NZ are likely to continue for the foreseeable future - although their exact impact and the outcomes they produce are difficult to forecast. What is very clear is that 'future proofing' a business or an economy is one that has to be grounded in people.

As far back as 2003, researchers such as Ware and Grantham have been suggesting that while human knowledge is typically identified as the primary source of competitive advantage, most organisations simply fail to capture this value.

Part of the explanation for the failure of rhetoric to match reality, particularly in the SME sector, seems to lie with the diverse drivers of change. These drivers range from the changing nature of work itself; the changing workplace demographics in an increasingly diverse community; broad but fundamental changes in society to technology and environmental issues to government policy.

While there is considerable agreement in the literature that these are the major forces shaping the future of work and the workplace, views as to the impact and implications of these factors are often polarised.

At one end, we find researchers such as Hannon (2011), with a positive view – who for instance sees the changing demographics as one where the emerging young generation of workers will be a force for positive outcomes. He sees them as "enthusiastic idealists" who are open to workplace change and flexibility as well as the use of technology to:

> "...teach business leaders how to embrace the power of informal social networks online for problem solving and decision-making" (p. 57).

However, at the other end are those who are less enthusiastic about the future workplace. For instance, Humphry (2014) observes the influence of technology will impact on the flexibility and transience of employees. She suggests that the "workplace" will cease to be a location fixed in a specific place and time. In the future, it will be placed into the hands of the individual employee who will be left to "set it up, keep it going and fulfil its many promises" (p. 363).

There are also those who see the tensions in the future of work and offer solutions as to how they may be addressed. Leading UK academic, Professor Linda Gratton (2010) is a key figure writing in this space and offers the following suggestions for organisations and managers seeking to navigate this future workplace where:

1. Organisational managers should offer transparent and authentic leadership, engaging with the workforce in an honest and open manner and leading by example.
2. There needs to be an investment in the creation of high-performing virtual teams, enabled by technologies and the necessary training.
3. Organisations need to foster the development of strong social capital facilitated by inter-organisational networks and relationships.
4. These networks should be not just focused on traditional supply chain or production issues, but entrepreneurial engagements with customers and other businesses in order to co-create opportunities.
5. There needs to be a capacity for flexible working arrangements.

These five areas resonate with the suggestion by Moore (2016) that the future of work is being shaped around a set of skills that employees will need to possess or to develop. These include the ability to collaborate, use technology, communicate effectively, acquire and apply knowledge, be self-regulating, globally aware, and capable of real-world problem solving.

For younger, university educated employees, these attributes are relatively easily acquired and graduate destination surveys in both countries show that either working in or establishing their own small business is an appealing option for many (refer to **http://www.graduatecareers.com.au/research/researchreports/gradstats/, https://nzgraduateoutcomes.ac.nz/** and **https://www.glsnz.org.nz/about/).**

However, the workforces of NZ and Australia are comprised of highly diverse populations and includes many workers who are older, migrants, have disabilities, are from a range of cultural and ethnic backgrounds have family commitments and differing sexual orientations (AHRC 2014, **https://diversityworksnz.org.nz/benefits-of-diversity/**).

These workforces are likely to see greater older age group participation in the future (Phillipson 2013). Yet for many older workers, and those with disabilities, the workplace remains difficult to enter and navigate (AHRC 2016; Sopoaga, *et. al*, 2017).

The role of small business in playing part in shaping the future of work presents some exciting prospects - as well as major challenges that need to be clearly identified and addressed. We hope that this report will provide a step towards achieving both of these goals.

THE ROLE OF SMES IN A FUTURE OF COMPETING WORLDS

The tension between the different views as to the future of work are captured in a PwC (2014) report, *The future of work: A journey to 2022* (PwC 2014), which sets out three potentially competing paradigms. These are briefly described below and then, by drawing on the results of stages 2 to 5 of this study, we identify the directions that NZ and Australian workplace relations may be best described as moving to.

THE "ORANGE WORLD"

The first paradigm is "The Orange World" and characterised as a fragmentation of large, conglomerate organisations into smaller legal entities of SMEs, all competing and collaborating within specialist niches.

Success in this world will require high degrees of flexibility for both the employer and the employee. It will see the rise of the "portfolio career" and the use of part-time, casual contractors and freelancers engaged on a short-term contractual basis.

A number of academics view the future as being dominated by the self-employed "nano" entrepreneurs or independent professionals (IPros) (e.g. Popma 2013; Leighton and Brown 2013; McKeown 2015). As described in the report:

> "Big business will be outflanked by a vibrant, innovative and entrepreneurial middle market. A core team embodies the philosophy and values of the company. The rest come in and out on a project-by-project basis. Some firms compete on quality and specialisation, while others offer commoditised price-dependent support. Telepresence and virtual solutions allow for greater remote working and extended global networks" (PwC 2014 p. 20).

For employees to be successful in the Orange World they will need to have valuable skills and expertise. Their loyalty to any particular organisation of any size may be limited and transient, and they are more likely to have loyalty to professional associations and guilds, trade bodies or similar communities that offer them certification and recognition of their skills and qualifications, as well as training and development.

THE "BLUE WORLD"

The second paradigm is that of "The Blue World", characterised by a global market place dominated by a few large corporations focused on profit, growth and market leadership. To succeed in this world, organisations will need to be very large and global, with sufficient economies of scale and scope to attract the best human capital from around the world.

Employees working within this environment will enjoy job security, high financial reward, pensions, health care and long-term employment - but at the cost of flexibility, personal freedom and the pressure to perform.

Working within large corporations will see employees required to hand over some degree of individual freedom to the employer who is likely to maintain personal data on health, performance and even private life in return for job security. Note here that PwC (2014) found that over 30 percent of people surveyed globally for the research indicated that they would be happy to provide this information - with younger age groups more willing than their older counterparts would.

THE "GREEN WORLD"

This world is characterised by companies that possess a strong corporate social responsibility to deliver to customers, employees and other stakeholder's outcomes that are socially and environmentally beneficial.

Demands from shareholders, consumers and employees to have businesses establish and move towards goals that offer social, ethical and environmental as well as economic and shareholder benefits will drive this behaviour.

According to this worldview companies:

> "are open, trusting, collaborative learning organisations and see themselves playing an important role in supporting and developing their employees and local communities. Companies have strong control over their supplier networks to ensure that corporate ethical values are upheld across the supply chain, and are able to troubleshoot when things go wrong. In turn, the combination of ethical values, support for the real economy and family friendly hours is an opportunity to create a new employee value proposition that isn't solely reliant on pay" (PwC 2014 p. 15).

WHICH "WORLD" FOR AUSTRALIA AND NZ SMES?

The wider literature offers a number of important corollaries that must be kept in mind with the three worlds. While many present quite clear and perhaps overly simplistic options, the reality is that they are not binary choices. The real world experience will clearly provide a much more complex mix of organisations subject to each of these characterisations.

While the Orange World is all about SMEs, they are largely unimportant in the Blue World while the Green World offers the potential for a mix of all.

While PwC (2014) and the literature overall does not predict which of these three "worlds" is likely to dominate in the future, they do suggest that we are at a stage of competing options for where the future workplace might head.

This view is echoed in a major report issued by the Committee for Economic Development of Australia (CEDA 2015), which examined global trends, their impact on the Australian workplace and worker, and the likely policy responses from government.

The CEDA (2015) report acknowledges forces likely to shape future Australian workplaces that accord with those discussed above. In particular, the role of technology to either substitute for existing labour (i.e. estimates of up to 40% of current jobs being replaced by machines), or disrupt the way work is conducted with the effect of lowering wages.

Of relevance to both Australia and NZ, CEDA (2015) suggest that what is needed is a "new social contract" that recognises the role of government as a key facilitator of the nation's human capital, innovation and economic growth. In Australia this requires the coordination of state and federal government activities and a "comprehensive review of regulation, pricing and licensing arrangements" and the phasing out of industry subsidies are recommended. While NZ does not have the same layers of government as Australia, there is a similar challenge of co-ordinating regional and state actions and bridging the rural versus urban divide.

The calls by CEDA (2015) for a much greater investment in education and training, particularly in the use of information and communications technologies (ICT) resonates as an imperative in both countries. In addition, it recommends assisting workers from declining industries to redeploy through "a concerted effort to reskill workers prior to retrenchment" (p. 15).

These concerns are echoed in NZ – see for instance **https://www.careers.govt.nz/jobs-database/whats-happening-in-the-job-market/the-future-of-work/#cID_2422**. One surprising difference between the two countries is worth noting. A recent OECD working paper entitled 'Automation, skills use and training' (Nedelkoska & Quintini, 2018), finds New Zealand workers face the lowest risk of automation, along with those from Norway, Finland and the United States.

WHAT DOES THE DATA REVEAL?

Starting with an examination of the Australian workplace relations system, it seems that the Orange World may be a significant future pathway for Australian business. This is the option that PwC (2014) describe as:

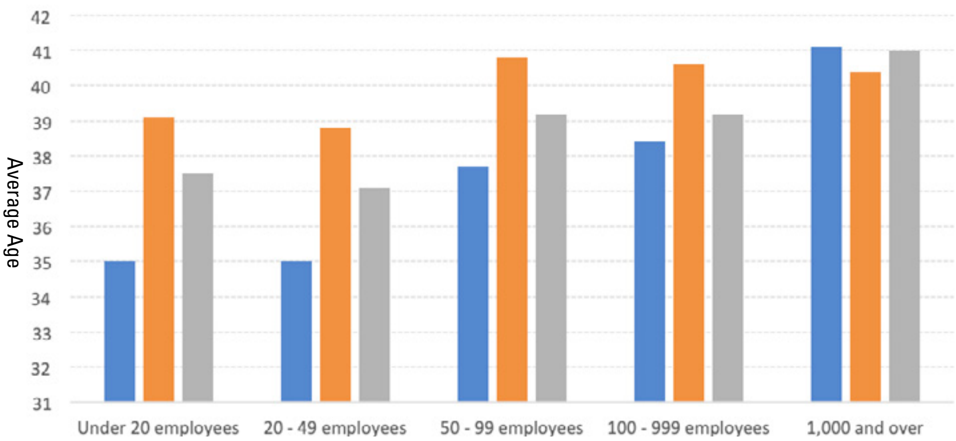
> "… characterised as a fragmentation of the organisation into a large number of SMEs competing and collaborating within specialist niches - where success requires high degrees of flexibility for both the employer and the employee" (PwC, 2014),

Australia's and NZ 's small to medium enterprises (SMEs) already employ around 70 per cent of the workforce and are contributing the majority of the industry value added (ASBFEO 2017; NZstats, 2017).

As shown in Figure 1, Australian small firms already tend to use some form of individual arrangement, whether it be a common-law contract or some variation on the relevant award, to recruit and retain higher skilled and higher paid employees.

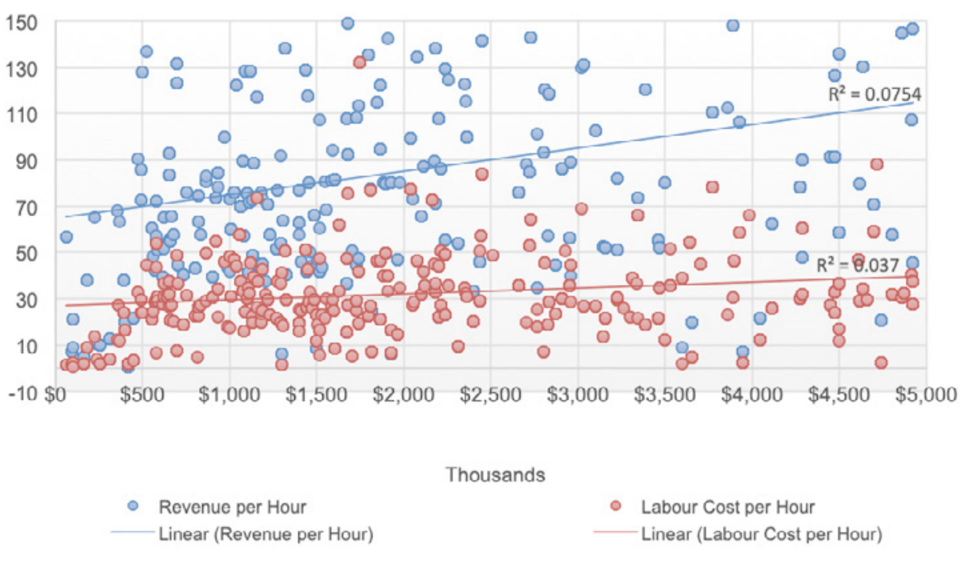
Smaller firms also generally pay their workers less than larger firms, reflecting the lower financial capacities, lower complexity, and lower capital usage. These measures combine to produce what is generally seen as the lower labour productivity of SMEs in comparison to larger organisations. This is clearly illustrated in Figure 2 where we see a divergence of the cost of labour per hour worked and the revenue per hour of labour worked as total organisational revenues increase.

Figure 1: Average age of employees by employment agreement and firm size



Data Source: ABS Employee Earnings and Hours, May 2016.

Figure 2: Labour productivity in Australia



Source: Fair Work Australia - Australian Workplace Relations Survey 2014

THE ROLE OF HISTORY SHAPING THE FUTURE

The big picture scenarios just outlined above provide a background as to what past research suggests may shape the future of NZ and Australian workplaces. However, while globalisation, technology, social and demographic change and the environment all play significant roles, government policy remains a key factor. This is particularly the case for both NZ and Australia, as both have a long history of government regulation of workplace relations (Lambropoulous 2013).

Regulations are most often seen as externally imposed by government across all levels. As reflected in the following comment from one source (albeit not necessarily focussed solely on workplace relations):

> "... dealing with local government was 'quite good' [but] State government was the 'biggest hurdle' and criticism focused on State government processes... often in a state of change, too slow and staff not understanding or flexible in their approach" (Sawyer, Evans and Bisua 2014 p.10).

An example of the impact of the legal and adversarial approach to workplace relations found in Australia is illustrated by the work of Freyens and Gong (2015). A meta-analysis of termination of employment decisions under the former Workplace Relations Amendment Act 2005 found:

> "...that in ideologically charged regulatory contexts such as statutory dismissal law where judges interpret rather than make the law and where legal standards are relatively weak, judicial processes are very unlikely to be free of social values and judicial decisions will regularly rest on the ideological stance of the judge" (Freyens and Gong 2015 p.18).

What is important for the small business sector is that Australia's workplace relations system may be largely unhelpful or even irrelevant to the majority of SMEs either that do not have employees or who employ few people. In such firms, there is often no distinction between managers and workers.

WORKPLACE REGULATION AND THE SME

Welsh and White (1981) declared in their classic *Harvard Business Review* paper on the financial management of small firms:

> "A traditional assumption among managers has been that small businesses should use essentially the same management principles as big businesses, only on a smaller scale. Underlying that assumption has been the notion that small companies are much like big companies, except that small businesses have lower sales, smaller assets, and fewer employees. We would argue, though, that the very size of small businesses creates a special condition – which can be referred to as 'resource poverty' – that distinguishes them from their larger counterparts and requires some very different management approaches" (Welsh and White 1981 p. 18).

To put this into perspective Australia has approximately 2.12 million businesses operating within the economy. Of these 95.6 per cent, employ fewer than 20 people and 84.2 percent employ less than 5 people. Furthermore, 60 per cent or approximately 1.32 million businesses have no employees other than their owner-manager (DIISR 2011).

What this means is that the workplaces of the majority of firms in both countries are characterised not by a formal organisational structure with managers and staff, but a more informal environment.

Formal Human Resources Management (HRM) processes and practices will emerge within SMEs as they grow in size and complexity, but they are adopted in response to the need to manage an expanding workforce, and may slow down as the firm reaches a given size (Kotey and Slade 2005). The adoption of formal systems is driven out of necessity or under pressure from external regulation as in the case of work health and safety (WHS) (Bahn *et al.* 2013).

Workplace management systems built on an industrial relations (IR) model, designed for managers versus workers, are less appropriate for SMEs than they are for larger organisations (Wooden 2005; Dunphy and Rozenbergs 2008). There is also evidence suggesting that regulations may not in fact have the impact on workplace relations within SMEs as they were intended to (Rahim and Brady 2015). The overall view emerging from the literature on workplace relations and SMEs is that it is not so easy to see or even understand how the SME sector fits in to the system.

In a report on workplace relations in Australia, the Productivity Commission (2015a/b) made a number of recommendations of relevance to SMEs. The report includes several moderate and incremental reforms to the current operation of unfair dismissal laws, which would leave most of the existing legislation and its protections intact (Productivity Commission 2015). Although other research suggests that very few SMEs have been adversely affected by these laws (see: Harding 2002; Robbin and Voll 2005), the issue has captured a good deal of attention in the public and political domain (Bryson and Howard 2008). According to the Productivity Commission:

> "...the basic premise of assisting small business to navigate the complexities of unfair dismissal legislation is reasonable but the Code does not achieve that outcome and provides a false sense of security" (PC 2015 p.31).

The recent proposal to introduce a new type of workplace agreement for SMEs, called the "Enterprise Contract", would see employers vary industrial awards for classes of employees (for example, casual employees or weekend employees), and this would allow employers to innovate at the firm-level in a way not otherwise available under awards (Productivity Commission 2015). An Enterprise Contract lies somewhere between an individual and a collective agreement and the Productivity Commission suggests it would involve less complexity and be particularly appealing to small businesses. However, it has been likened by some to a return to the Work Choices IR legislation that was so contentious an issue from 2005 to 2009 (Buchanan 2015).

Taken together, these issues suggest that there is much to be positive about when considering the nature of work in Australian SMEs. The informality that characterises workplace relations tends to predispose SMEs to agility and flexibility. This informality also creates overwhelmingly positive outcomes in terms of the relationship between SME managers and their workers. This is achieved within regulatory structures that tend to be less flexible than those available to large employers are.

These insights indicate a future that will require greater flexibility within the existing IR legislation, particularly in relation to its effects on SMEs (Barry 2016; Carmody 2016; Forsyth 2016; KPMG 2016; Thornwaite and Sheldon 2014). The notion of regulation raises an issue related to research question 2, that is, what are the options for government and its role in the workplace of the future?

THE POSSIBLE ROLES OF GOVERNMENT?

There continues to be support for an ongoing role by government in regulating workplace relations (Foreman-Peck 2013; Deloitte 2015; Greber 2016). However, the role for government is generally offered as moving to being an enabler rather than a provider of solutions, a partner and facilitator not a leader or authority figure (Bajorek *et al.* 2014; Blackburn and Schaper 2012; Bray *et al.* 2015; Bridge 2010; ILO 2016; WEF 2014; 2016). The challenge for policy makers and regulators thus emerges as one of how to make this transition because:

> "Governments are faced with a balancing act... potential innovations that enhance cognitive capacity also pose new regulatory and ethical challenges for business, government, social institutions and international organizations" (Deloitte 2015 p.3).

Ideally the future workplace will be one in which conflict between employers and employees either is absent or significantly diminished. Further, the notion of adversarial and legalistic regulatory regimes replaced by a harmonious culture marked by employees and businesses working together constructively and negotiating arrangements of mutual benefit is also the idealised goal of strategic HRM policies and practice (Bague 2015).

Here again we find evidence of an Orange World future emerging within NZ and Australia with the unique requirements of SMEs already recognised by state and federal governments. Examples range from the establishment of special provisions within the workplace relations legislation to the formation of dedicated points of contact and support.

In Australia, this can be seen in the Small Business Commissioners and the Australian Small Business and Family Enterprise Ombudsman (ASBFEO) roles, as noted by Schaper (2014).

> "Australia has also been capable of initiating its own unique public policy tools. For example, the creation of Small Business Commissioners in the last ten years has been a distinctively different initiative, developing independent statutory officers with a responsibility to speak out to government on behalf of the sector whilst also providing business people with information, advice and mediation" (Schaper 2014 p.232).

In NZ, examples range from the work MBIE is doing with **www.business.govt.nz** through to the recently formed small business (**https://www.beehive.govt.nz/release/new-strategic-direction-small-business**).

However, the underlying structure of both the NZ and Australian workplace relations systems continues to be based on an adversarial and legalistic model rather than a cooperative and mutually negotiated collaborative one (Rasmussen, Foster & Coetzee, 2015; Stewart *et al.* 2014).

THE FUTURE OF THE NZ & AUSTRALIAN SME WORKPLACE

When considering the future of the NZ and Australian workplace we can refer back to the "three worlds" scenario outlined by PwC (2015), and recognise that all three worlds already exist within the economy.

As noted earlier the current landscape of Australia's business community is characterised by the 'Blue World' with a few large firms and a very substantial number of small ones. However, there are aspects of the 'Orange World' as the contribution of SMEs to the national economy is significant, with small firms contributing around 35.3 per cent of industry value added and medium-sized firms around 22.4 per cent (DIISR 2011). Table 1 summarises some of the key sources used to guide the discussion that follows.

Table 1: Illustrative Future of Work Literature Relevant to SMEs

Source	Context	Focus	Main Findings	Workplace relations implications
CIPD, 2015	SME specific/ UK	Productivity policies moving beyond needs of individual businesses	A supportive 'ecosystem' is needed	Encourage local skills 'ecosystems' enabling SMEs to improve people management and HR practices. Continue to invest in the creation of industrial partnerships that focus on supporting SMEs.
Hajkowicz, et al, 2016	Australia	Digitally enabled workforce	Digital technology allows even nano businesses to build reputation; access large markets; reduce barriers to entry for start-ups; opportunities to experiment with new business models.	Digital technology will continue changing workplace structures, operations and relations
Kinner, 2015	Australia/ Hi tech start-ups	Crossroads 2015: An action plan to develop a vibrant tech start up ecosystem	Need to take immediate and far-reaching steps to address market failures that impede the maturation and growth of our start up ecosystem.	Policymakers need to understand that tech start-ups have different needs from small businesses.
Martin, 2016	Analysis of contradictory views	The sharing economy	Need for empirical research into the nature and impacts of the sharing and collaborative economies	The sharing economy can be framed as: (1) an economic opportunity ;(2) a more sustainable form of consumption.
PwC, 2014	Survey of 10000 people in UK, US, China, India, Germany	The future of work: A journey to 2022	Three scenarios – with one being 'small is beautiful' being the most relevant to SMEs	Companies break down into collaboration networks of smaller organisations; specialisation dominates the world economy
PwC, 2015	Survey of 2,000 UK consumers 220+ CEOs around the globe	The 'connected living' market	Greater control over 'portfolio' careers, contracting time and talents to employers for defined projects, rather than employee of an organisation.	Increasingly work as members of collaborative professional networks, using online tools and forums to build a profile and connect with opportunities.
Stormer et al, 2014	UK/ Analysis of 300+publications Interviews with 23 experts	The labour market of 2030	New business ecosystems leading companies to be increasingly defined as 'network orchestrators.' Four scenarios offered with Innovation Adaptation being most relevant to SME growth	Collaboration in value creation networks is enabled by the rise of the digital economy. Highly networked companies tend to be small. SMEs are booming, while large multi-business companies tend to stagnate or shrink.
World Economic Forum, 2016	HR Managers	Future of jobs	Discussions polarized: • limitless opportunities in new job categories that improve workers' productivity and liberate them from routine work • massive labour substitution and displacement of jobs	Leveraging flexible working arrangements and online talent platforms: Physical and organizational boundaries increasingly blur. Modern forms of association will emerge to complement these new organizational models

When Future Worlds Collide

Given the dominance of large firms in Australia, it can be argued that discussion as to the future of work should really focus on whether we see either the "Blue World" or the "Green World" emerging as the principal paradigm in a battle essentially fought out between large firms. It is an argument that produces some important insights into the real impact of the drivers of change noted earlier. This is shown most powerfully in any analysis of the "Green World" scenario.

For instance, while some corporations may choose to adopt corporate social responsibility (CSR) agendas independently, many are motivated by extrinsic forces such as consumer or societal pressure (Rizkallah 2012), or government regulatory pressure on corporations to minimise or eliminate waste, phase out the use of harmful substances, and make better use of renewable resources (Rizos *et al.* 2015).

The quest for the "Green World" scenario is an agenda embraced by many governments and government authorities around the world. In several instances, this is being developed with a view to encouraging change within the "Orange World" of the SME community and we find a merger of both worlds.

The European Commission launched a *Green Action Plan* (GAP) for SMEs in 2014 with the aim of helping small firms use environmental challenges to create business opportunities. Fusion (2015), a partnership of 10 organisations across England, Netherlands, France and Belgium has produced a guide for policy makers to help them develop a "circular economy" in which SMEs can be assisted to adopt environmentally responsible practices.

In Australia, White (2015) suggests that an environmentally sustainable "circular economy" is likely to generate around $26 billion by 2025.

Future Challenges of Diversity

Whatever 'World' eventuates as the dominant paradigm, a major area of focus for future workplaces will be the need for organisations to learn how to manage an increasingly diverse workforce. This challenge of diversity management features as a separate detailed report but key points relevant to the future of work are:

- Australia is a highly diverse, multi-cultural society with strong anti-discrimination laws encompassing race, age, disability and gender (AHRC 2014).
- The Fair Work Act 2009 also contains anti-discrimination provisions for the same things. However, claims and complaints of discrimination within Australian workplaces based on such differences continue to be made (AHRC 2016).
- While there is some evidence that diversity in the workforce can enhance productivity (Ali *et al.* 2011; 2015; Mohr and Shoobridge 2011; McGuirk *et al.* 2015), much more attention needs to be given to this in future research.
- Economic change driven by globalisation and technology will disrupt many existing industries and it will be important to develop social and economic programs designed to assist employees to transition to new opportunities (Dhakal *et al.* 2013; Meyermans 2016; Dutta-Gupta *et al.* 2016).
- There will also need to be a diversity management approach to addressing the needs of different industries and to recognise the highly diverse nature of the SME sector where a "one size fits all" approach is to be avoided (Bekiaris 2010; Hardie and Newell 2011).

Future Challenges of Time and Place

A key issue facing the management of future workplaces is balancing the needs of the individual employee with those of their employer. Within the workplace, this generally translates into a negotiation over flexible work arrangements (Hill *et al.* 2008). Two of the most common areas negotiated within flexible working arrangements are flexibility of time (flexitime) and flexibility of place (flexplace).

As discussed earlier, technology is allowing some workplaces to effectively transcend the conventional boundaries of time and place (PwC 2016). Existing regulations, laws and policies will need to keep pace with the changing working conditions and emerging issues, or provide support dynamism in workplaces. As noted by Kidman (2016):

> "… the rapidly evolving field of the 'Internet of Things' - a broad term used to describe network-aware devices that can share data for a variety of purposes [where] the ownership of the server that allows it to talk to other products is arguably more vital than the ownership of the product itself."

The emergence of the digital economy offers both significant opportunities and challenges to future workplaces (Degryse 2016; Hajkowicz *et al.* 2016; Ruggieri *et al.* 2016; Stōrmer *et al.* 2014). Digital technologies and artificial intelligence are already beginning to replace workers in formerly highly skilled jobs. However, human problem-solving abilities remain superior to computers particularly in unstructured, non-routine environments. Human workers will still be needed in employment tasks that require perception and manipulation, creative intelligence and social intelligence (Bradlow 2015).

The role of government in this environment is to keep pace with technological change and ensure that they support the economy and do not become a drag on it. For example, as the Australian Chamber's (2015) annual red tape survey commented:

> "A key message is that governments, like the private sector, need to be aware of the changing nature of technology and update their communications methods and strategies accordingly" (Australian Chamber 2015 p.18).

"The Orange World" of the "nano" firm and the "gig economy"

This impact of technology will have the potential to significantly enhance the "Orange World" of the SME. However, it will also mean that small firms, many of which will be "nano" businesses of one person, must be recognised for their importance and enabled to participate in the economy with the same rights as their larger counterparts. As noted by Tewari *et al.* (2013):

> "SME space tends to be highly complex – with heterogeneity in firm size, specialisation, spatial dispersion and performance. Moreover, in many countries SMEs, for a large part, operate in the informal sector compounding complexity" (Tewari *et al.* 2013 p.1).

The rise of the "nano" enterprise of independent professionals (IPros) and self-employed sub-contractors operating within networks is already an emerging trend reflected in the literature (Horowitz 2010; Leighton and Brown 2013; Popma 2013; McKeown 2015; Meyermans 2016). There is also a global call for more entrepreneurship and new venture creation in order to stimulate economic growth and the creation of more jobs (OECD 2015; Osimo 2016; Kinner 2015; Wiens and Jackson 2015). However, only a few start-up firms will survive beyond five years (Davila *et al.* 2015), and even less will grow strongly to generate jobs and GDP (Clayton *et al.* 2013; Acs *et al.* 2016). Nevertheless, SMEs can and do innovate and often provide a valuable linkage within a wider industry network that incorporates both small and large firms (Laperche and Liu 2013; Palangkaraya *et al.* 2015; White *et al.* 2014; Mooney and Sixsmith 2013).

For the majority of SMEs, the ambition for growth is low due to the strategic vision and desires of the firm's owner-manager (Perry *et al.* 1988; Moran 1998). Growth, particularly high growth, is fraught with risk and requires an entrepreneurial mindset that is generally not present in the majority of SMEs (Hambrick and Crozier 1985; Smallbone *et al.*, 1995). Outside the fast growth start-up entrepreneur domain is the emergence of a "gig economy" characterised by self-employed individuals working within teams of similarly structured "businesses" to undertake skilled technical or professional work and with little connection to an employer (Lewis 2015).

While the "gig economy" is often seen as synonymous with entrepreneurship and opportunities for people to advance their careers based on their abilities, rather than through long service, firm loyalty or "time-serving" (Card and Mulligan 2014; Gettler 2013; Horowitz 2010; Lewis 2015; Ruggieri *et al.* 2016), concerns have been expressed from some quarters about a lack of job security and access to traditional employment entitlements such as sick and recreation leave, minimum wages, superannuation, unfair dismissal and so on (Broughton and Richards 2016; Di Stefano 2016; Martin 2016). As Lewis (2015) notes:

> "…a significant growth in the gig economy would pose a major problem for Australia's industrial relations system."

Writing of the growth of jobs in the UK, Dobbins, Plows and Davis (2016) link this to the language of entrepreneurship noted above but provide a different characterisation, suggesting that while "people might self-identify as being entrepreneurs by managing to earn anything at all in a post-crisis jobs market", on average, the self-employed earn less than other workers, as well as having less access to benefits like training and pensions.

BOOSTING FUTURE WORKPLACE PRODUCTIVITY

Any discussion over the future of the workplace needs to consider how changes in the current status quo might improve productivity. This returns us to the utopian versus dystopian views of the future we began with in this report. Despite having enjoyed a long boom of almost 25 years the national economy is now facing new challenges and new opportunities as the forces of globalisation, technological, demographic, social and environmental change impact the workplace.

CEDA (2015) predicts that within the next 20 years' technology might replace around 40 per cent of existing jobs in Australia, while simultaneously lowering workers' wages in remaining sectors. At the same time, the application of technology as a major enhancer of productivity is also an anticipated trend with evidence from the mining and resources sector in Australia (Durrant-Whyte *et al.* 2015) or prefabrication in the construction sector in NZ (Shahzad & Mbachu, 2013) – both large industries where SMEs play key roles in all levels of the value chain.

While jobs are likely to be lost in some sectors there is optimism that new ones will be created in areas such as: i) food and agribusiness; ii) mining equipment, technology and services; iii) medical technologies and pharmaceuticals; iv) oil, gas and energy resources; and v) advanced manufacturing (Bradley 2015). Such industries will demand a workforce that is globally competitive, highly skilled and able to make best use of the new technologies (Beckett & Chapman, 201; Cave *et al.* 2014).

THE PERSPECTIVES OF SMALL BUSINESS OWNERS

In our current study, discussions surrounding the issue of small business owners' perceptions of the future were undertaken through a series of industry forums in which focus groups were held in metropolitan and regional areas: NSW (Tamworth and Parramatta), Tasmania (Hobart), Victoria (Melbourne, Yarra Valley and La Trobe Valley), and WA (Perth and Margaret River).

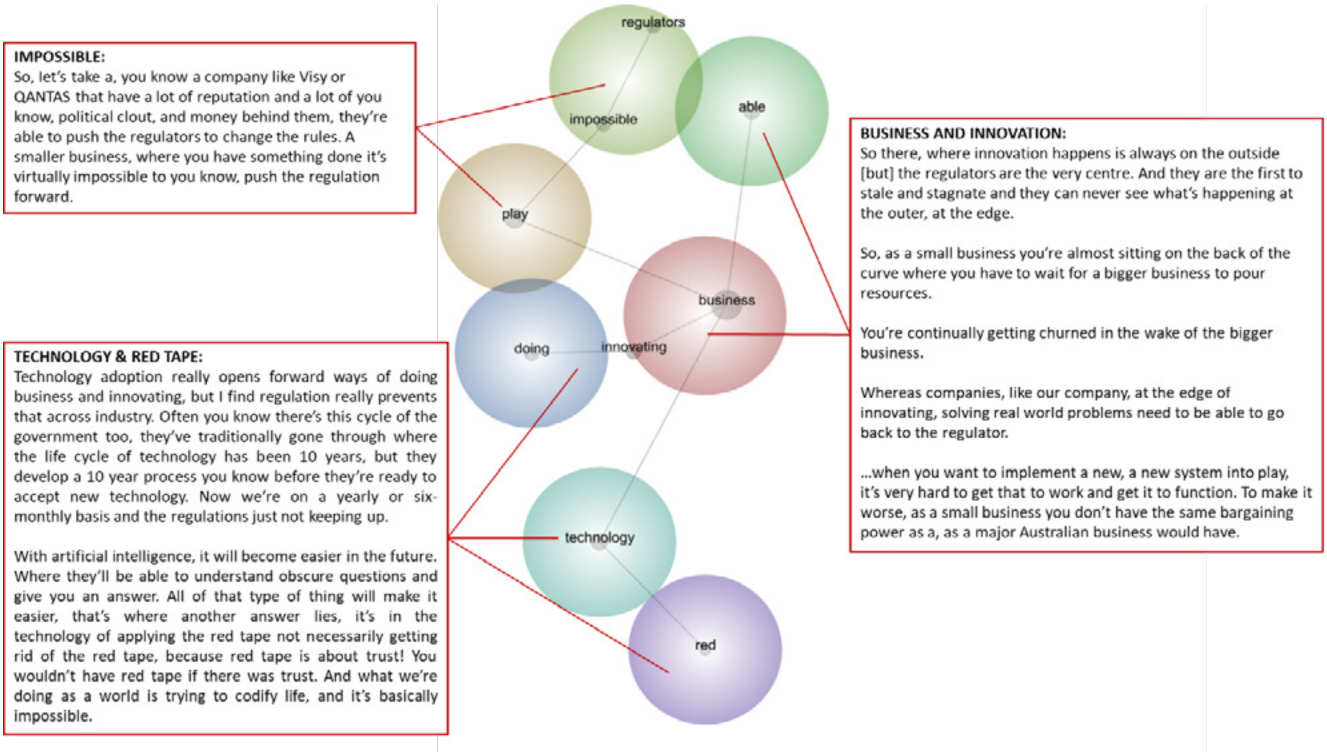
The results from these Australia wide forums and interviews with Australian SME owners provided broad ranging detail about the future of work. Overall, the views that were expressed can generally be characterised as mixed. For example, small business owner Tony from Hobart, predicted that workplace regulation would become easier for small business:

> With artificial intelligence, it will become easier in the future. Where they'll be able to understand obscure questions, and give you an answer. All of that type of thing will make it easier, that's where another answer lies, it's in the technology of applying the red tape, not necessarily getting rid of the red tape, because red tape is about trust! … in the end, it's going to be all transferability and portability (Tony, Hobart).

An analysis of these discussions was undertaken using the Leximancer text analytic software.[1], the findings are illustrated in Figure 3.

[1] Leximancer is a text analytics software used to analyse textual documents and display the extracted information visually. The data is displayed by a conceptual map that shows the main concepts contained in the text and how these concepts are related.

Figure 3: Leximancer Concept Map – The Future of Work



This shows the concept map with associated comments. A sentiment lens was used within the Leximancer analysis to assess the positive or negative context in which the concepts were used (Zaitseva 2012). As illustrated in Figure 3, the Leximancer analysis identified two primary themes: **"business"** and **"red tape"**, the latter of which is a general description of government regulation. All the concepts, other than "red-tape" were found within the "business" theme.

There were seven separate themes with the most important being focused around the concepts **"business"** and **"innovation"**, which reflect the owner-managers' perception of the future workplace environment being shaped by innovation and new ways of working or "doing" things. However, there was a sentiment that their ability as small firms to shape this future using **"technology"** was likely to be impacted in a negative way by government regulation and red tape.

For small firms trying to play a role in shaping the future with innovation, there was a sense of the task as being **"impossible"**, due to the difficulties of overcoming regulators. By contrast, this was not viewed as being such a problem for large firms. Despite these concerns, the role of technology as an enabler emerged as a key driver and enabler in a number of different ways. For example:

> "Because of the capacity to manage and store documents, to share them through Dropbox and things like that. Particularly when you're working in a project context" (Geoff, Melbourne).

There were also those owner-managers with the networked collaborative communities where social media was seen as a key tool:

> "A lot of my friends have visited my store already and because they helped me and some brought little decorations …it's no longer like a small shop it's like a second home. It's becoming a community where people come and meet in person but a huge part will always be on to the social media platform. That's really important" (Mimi, Melbourne).

Although interpersonal networking and collaboration via face-to-face engagement was also important:

> "This isn't just the local town pub. It's a meeting place, it employs local young people and it is pretty much the heart of all community events" (David, Latrobe Valley).

The role of technology was a common theme also in identifying both the challenge and opportunities in moving ahead. As Liam (Melbourne) explained:

> “You have this on one hand and then you have this very innovative country trying to develop new businesses trying to get into the modern age, which is not going to be in coal, it is not going to be about building cars cheaper and better than China. It is going to be about technology, it is going to be about a skill-based and specialist range of industries. There is a huge dichotomy between the way we are saying we are approaching it and the way we actually are approaching it.”

He also offered a note of caution in that Australia does not seem to be a place where his business can prosper offering that:

> “The longer we go the more it makes sense to me to go overseas. And that is very sad.”

A number of small business owners mentioned a bleak house scenario where government will fail to capture the benefit of change and instead persevere in imposing outdated ideas. It is captured in an analogy offered by JP (Melbourne) that:

> “Innovation always happens from the outside. If you think of a coral reef. The very centre of the reef dies first, not the, the very edges, because the very edges the, ecosystem at the very edges is evolving the fastest to deal with new threats… So there, where innovation happens is always on the outside [but] the regulators are the very centre. And they are the first to stale and stagnate and they can never see what’s happening at the out, at the edge. Whereas companies, like our company, at the edge innovating, solving real world problems need to be able to go back to the regulator and say "hey this is the direction" and they need to, they need to sit up and listen.”

This concern was developed further by Eric (Melbourne) who suggested that:

> “Technology adoption really opens forward ways of doing business and innovating but I find regulation really prevents that across industry. Often you know there’s this cycle of the government to, they’ve traditionally gone through where the life cycle of technology has been 10 years, but they develop a 10-year process you know before they're ready to accept new technology. Now we're on a yearly or six-monthly basis and the regulations just not keeping up. So, when you want to implement a new, a new system into play, it's very hard to get that to work and get it to function.”

> “To make it worse, as a small business you don't have the same bargaining power as a, as a major Australian business would have. So, I’ll, let’s take a, you know a company like Visy or Qantas that have a lot of reputation and a lot of you know, political clout, and money behind them, they're able to push the regulators to change the rules. A smaller business, where you want to have something done it's virtually impossible to you know, push the regulation forward. So, as a small business you're almost siting on the back of the kerb where you have to wait for a bigger business to pour resources and more capital to do something first so you can follow them. So, you're continually getting churned in the wake of the bigger business.”

Summary of Interviews

Overall, the small business owners’ views were generally ones of excitement at the opportunity the future provides – but this excitement was tempered by real doubts as to government’s ability to provide the lead that will allow the small business sector to flourish.

Given the touted ability of technology to ‘level the playing field’ and overcome the size disadvantage that is necessarily a feature of small business, the fact that such concerns were found to be widespread amongst small business owners suggests that actions are needed to allay these concerns.

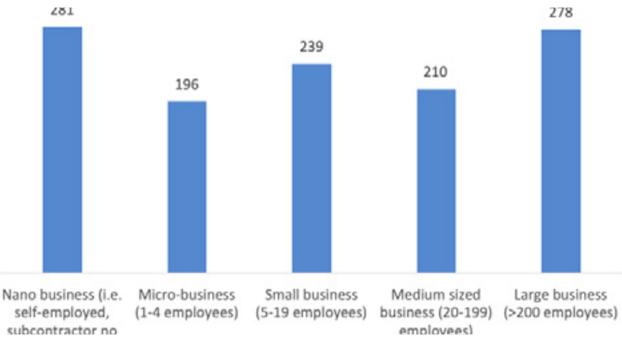
THE FUTURE AS SEEN BY EMPLOYERS AND EMPLOYEES

A survey undertaken for this current study explored the perceptions of 1,204 respondents divided equally into employers (n = 602) and employees (n = 602). The sample was highly representative of the Australian workforce and was drawn from across all states and territories, with strong representation from firms of all sizes and a wide range of industries.

Sampling and Demographics

The sample comprised a good cross-section of firms by size. As illustrated in Figure 4, this included: nano-businesses (non-employing self-employed enterprises) (23.3%); micro-businesses (1-4 employees) (16.3%); small businesses (5-19 employees) (19.9%); medium sized businesses (20-199 employees) (17.4%), and large businesses (>200 employees) (23.1%).

Figure 4: Size of workplaces represented in the sample



Firms from all main ANZSIC industry codes were represented in the sample, with good responses from most sectors other than mining.

The employers comprised a mixture of self-employed sub-contractors (37%), small business owner-managers (51%), CEO or managers with employment responsibilities (12%). The sample contained an even balance of men (52.1%) and women (47.9%), as well as a good spread of ages, ranging from 15-24 years to over 55 years old. Further, the sample also captured a representative cross section of educational levels that ranged from primary education to postgraduate degree. Other key demographic variables contained in the sample were family structure and location by state and territory.

The question posed in this survey to examine the future of work asked both employers and employees to: "Please describe how you imagine your workplace and job to look like in the future, and what things might shape this future?"

Leximancer Analysis

This textual data was examined using the Leximancer text analytic software (Leximancer 2016). The algorithms used within the Leximancer software, which examine and transform lexical co-occurrence information from natural language into semantic patterns without the need for manual intervention (Smith and Humphreys 2006). Because of this, Leximancer is an appropriate analysis tool for textual data where a greater control is required over potential researcher bias, thereby providing a more objective analysis of the data (Sotiriadou, Brouwers and Le 2014).

Figure 5: Leximancer concept map for future of the workplace

(Employer perspective)

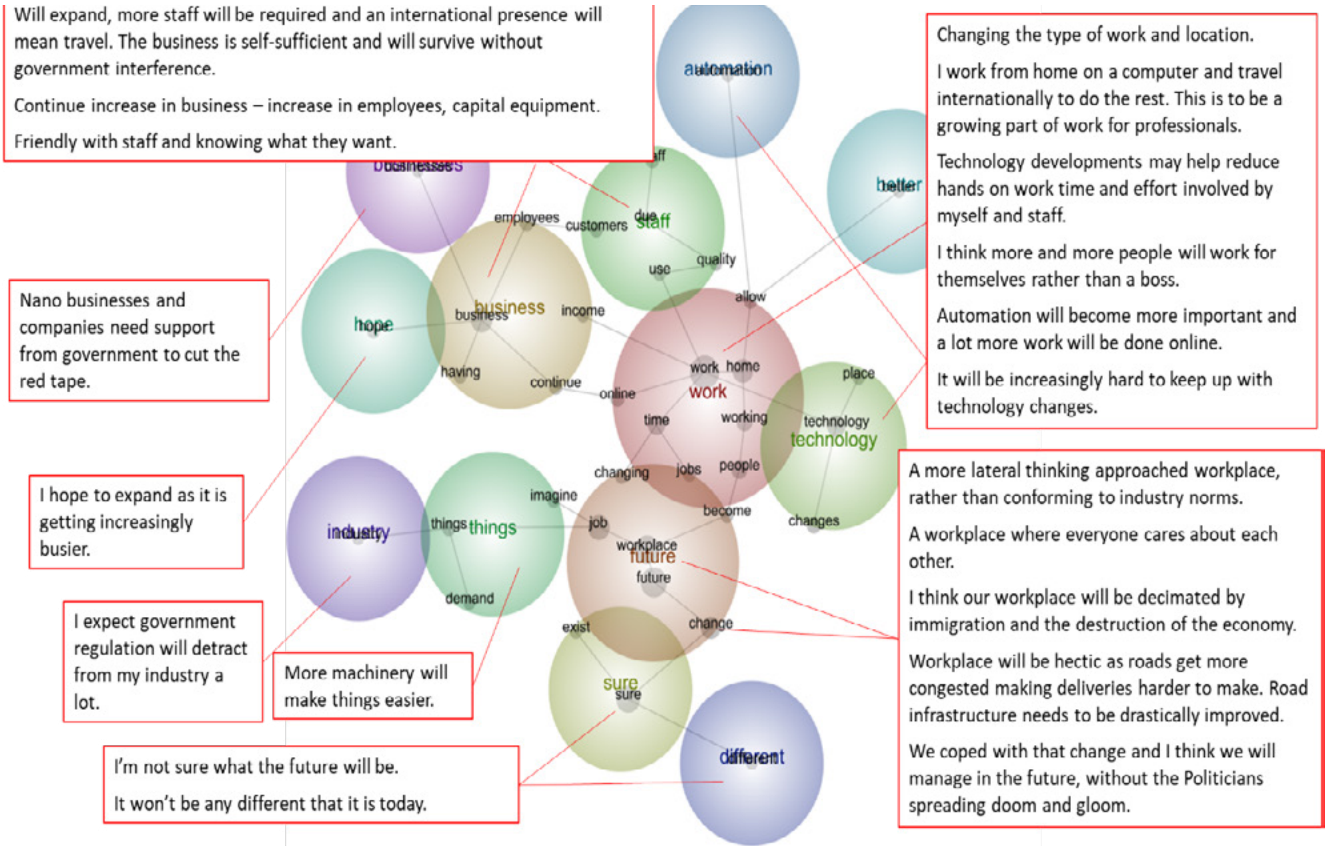


Figure 5 displays the concept map from the Leximancer analysis of the employer sample in relation to the question of what forces might potentially shape the future of the workplace. For Australian employers the key concepts were focused on '**work**', '**business**' and '**future**'. The theme '**work**' relates to the concepts of how work is likely to be performed with the view that work will increasingly be at home, with transactions online. Work was closely associated with '**technology**', which was viewed as a tool to enable the place or location of the workplace to be flexible (i.e. home based), but also creating changes in the workplace. The '**automation**' of work would allow for '**better**' flexibility and workplace options

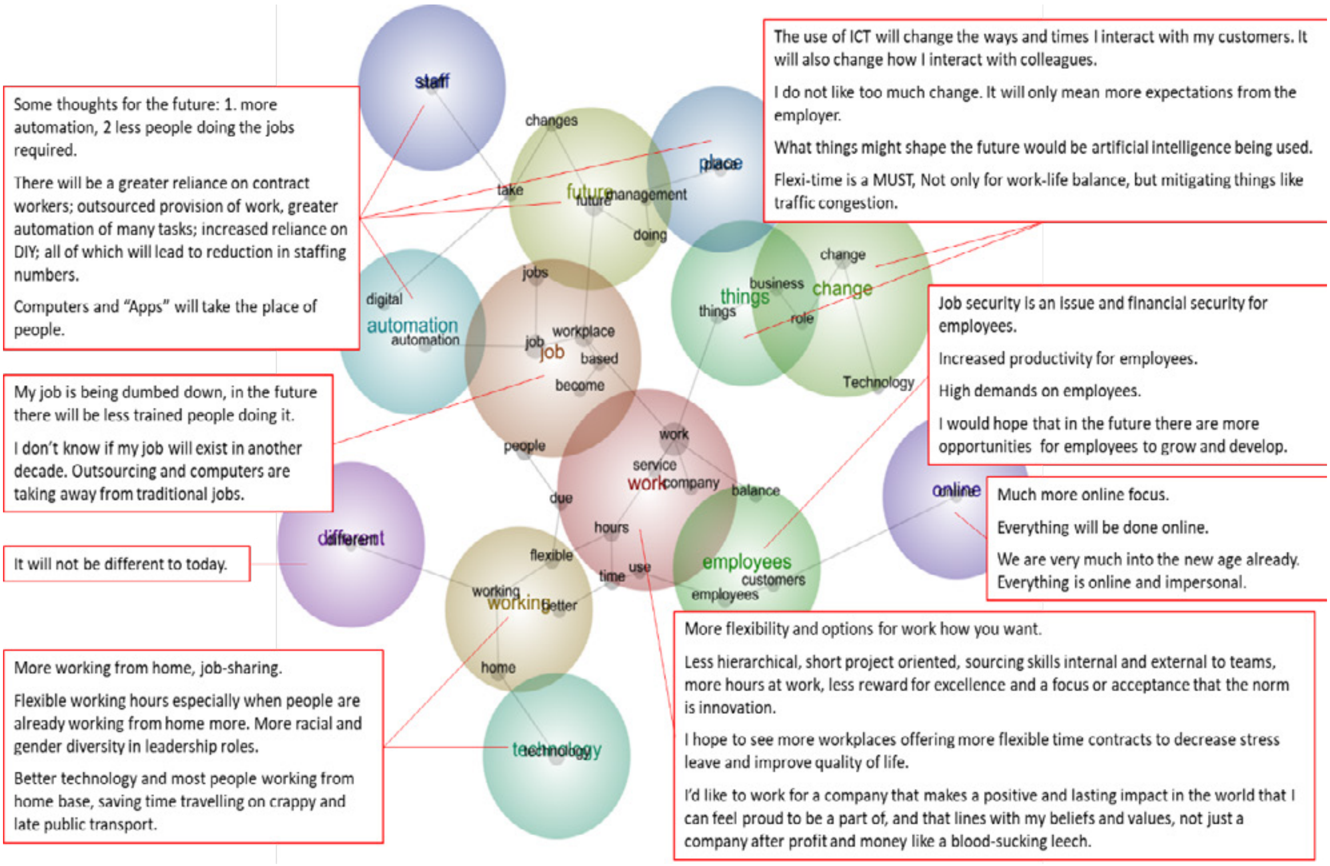
These results suggest that employers are generally positive about the future of the workplace. This is highlighted for instance in the '**business**' theme, which is associated with '**hope**' and the opportunities for growth, globalisation and the creation of more jobs. This result resonates with the desire for a more positive workplace environment based on collaboration between employers and employees previously noted in this report.

However, there were concerns raised over the need for government to do more for '**business**', in particular the nano-businesses, by reducing red tape regulation. This was also reflected in government impact on some types of '**industry**'. In addition, there were quite a few respondents who either did not feel they were '**sure**', or who were unsure, of what the future workplace might look like. Many also felt that it would not look much '**different**' to the workplace of today.

Figure 6 provides the second part of our insight into current perceptions on the future of the Australian workplace. Offering the employee perspective, it identifies 13 key themes and shows that the themes '**work**', '**job**', '**working**' and '**future**', were all connected, with the minor themes of '**technology**' related to '**working**' and the home as the location for work. These seem to reflect how many see the role technology might play in allowing more work from home in the future. The theme '**automation**' was also linked to '**job**', indicating the view that the automation of work tasks will influence the employee's job.

Figure 6: Leximancer concept map for future of the workplace

(Employee perspective)



Key concepts associated with the theme '**future**' and its associated themes '**staff**' and '**place**' were indicative of the impact technology and automation will have on the future of work, but also the view that the future workplace will see more casual and sub-contracted staff.

Table 2: Perceptions on the Future of Work (FoW) – Australian Employers & Employees

Themes	Employer Importance[1]	Employer Concepts Summary	Employee Importance[1]	Employee Concepts Summary
Job			**2** (83%)	What it will be like for *jobs* and people.
Working			**3** (47%)	The impact on *work*, particularly from home or via flexible hours.
Change			**5=** (23%)	For most, nothing will really *change*, at least for the better.
Employees			**5=** (23%)	Impact on *employees*, mostly negative due to lack of full time employment, but some positives about flexibility.
Technology			**7** (14%)	The increasing role of *technology,* both positive and negative impact.
Online			**11** (4%)	The increasing use of *online* communications and computing to do work tasks.
Businesses	**9** (2%)	The impact on businesses of future government policy to help or harm.		
Automation	**8=** (3%)	More *automation* of work and skills.	**8** (12%)	To deliver services and change how work is performed.
Place	**8=** (3%)	A *place* with better rewards, creativity and value for customers and employees.	**9** (7%)	The impact of technology and automation that will *place* pressure on employees and jobs, also the need to put in *place* strategies to meet this challenge.
Better	**8=** (3%)	FoW will be better with new technologies, more profit and growth		
Hope	**7** (4%)	The *hope* that the FoW will provide more opportunities.		
Things	**6** (10%)	The ability to use and make *things* in different ways, faster, more effectively etc.	**6** (16%)	The impact of *things* changing how work is performed and their impact on business.
Staff	**5** (18%)	The role and behaviour of *staff*, ideally more collaborative.	**10** (5%)	The move to less *staff* or more causal *staff* as technology is introduced.
Sure/ Different	**4** (34%)	Many not *sure* and feel it will not really change.	**12** (3%)	Nothing will really be any *different* to now.
Business	**3** (35%)	Impact business and employees, and what might continue as normal.		
Future	**2** (74%)	What it will be like for jobs and ideas about this.	**4** (42%)	Ideas for about the FoW, some positive and some negative.
Work	**1** (100%)	Impact on *work*, home, technology, time, working, people, online, changes	**1** (100%)	Impact on *work,* hours, time, and the company.

[1] *Indicates the relative importance and then the associated per cent of each theme within the Leximancer analysis.*

Another key theme '**change**' encompassed the anticipated changes that technology might have on things within the business and the role of employees. Some of these views were observations about the impact of technology; others were positive – with expectations of more flexibility and work-life balance – while others were negative.

Overall, there was a consensus that technology and automation would continue to drive the future of the workplace. However, as noted, this was viewed as both a positive and a negative. Some employees saw technology as a threat to their existing jobs, while others felt that it would enhance their productivity, enable them to work more from home, and offer much greater flexibility in the workplace. Table 2 reveals the degree of agreement – as well as the important nuances within these areas, and that only one of the groups identified some themes.

The 11 key themes identified by employers and 13 identified by employees are presented in terms of their importance (or what Zaitseva 2012 terms their connectivity scores). This reveals that the first two employers' concerns related to perceptions of how the future would affect the nature of work, with a focus on greater ability to work from home, and to use technology to allow better use of time. This aligns well with employee perceptions – but here the language of '**job**' pervaded.

Summary of Employer Survey

The key concerns for both groups focus on questions as to how the nature of working would change, and the impact it would have on people, including employers, with more use of online connectivity and changes to working methods. All bar one of the top employer concerns (the impact on business and employees of the business), were also reflected in employee concerns, there appears to be a disconnect with the lack of identification of issues by employers that were noted by employees.

While most perceptions focused on positive and negative issues about how the future workplace might look, the overall pattern that does emerge is that both employers and employees have a common understanding that technology will be the key driver for future change. For some, this seems to be seen as an opportunity in which they will be liberated from existing time and place rigidities. For others, the future looks bleak, with fewer jobs, less opportunities for work, pay and conditions.

CASE STUDIES OF THE FUTURE WORKPLACE

To gain a more in-depth understanding of the process of the possible future of the workplace, a series of case studies were undertaken with firms across Australia. Firms were selected to represent five different categories: i) young entrepreneurial firms; ii) stable micro-small firms; iii) stable medium to large firms; iv) growth focused micro and small firms; v) stable medium to large firms.

The following cases provide varying insights into the future of the Australian SME workplace.

Case Study 1: OOTD

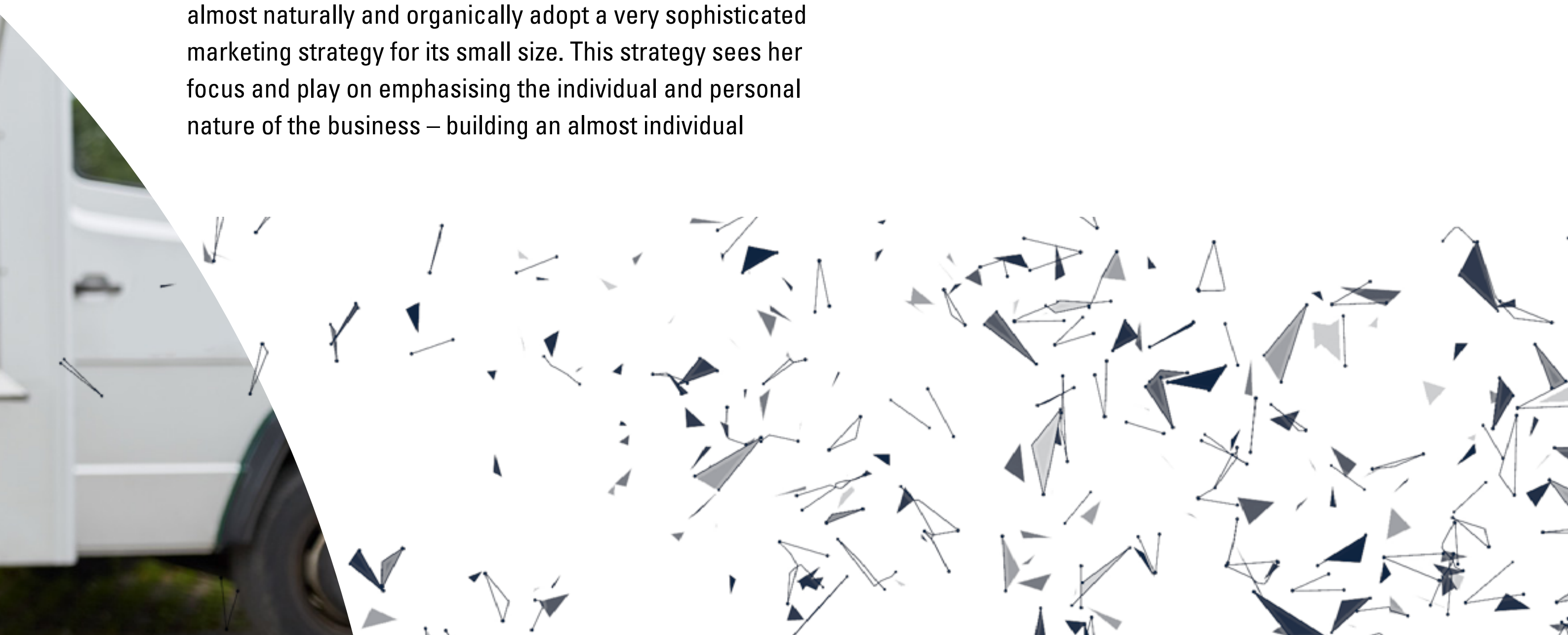
The case study of OOTD (**https://www.facebook.com/boutique.ootd/**), a combination 'bricks and mortar' and 'clicks' business model in the retail clothing sector suggests that the agility and flexibility of the SME – combined with the savvy use of social media technologies, point to the potential of 'The Orange World' really eventuating. A key factor enabling OOTD to operate a combined or hybrid business model is the owner' active exploration and use of social media (see Table 3 below for detail).

Table 3: Some of the Social Media Options at OOTD

Social Media Platform	Primary Target Market	Site address
Facebook	Australia	**https://www.facebook.com/boutique.ootd/**
heylio	China	**http://www.heyliao.com/2013/02/casual-tuesday-in-prahran.html**
WeChat	China	**http://ink361.com/app/users/ig-1805137894/ootd_style8388/photoshttps://instaliga.com/leeseolyo?page=1507354277960932461_585457281&loadCount=1**
Weibo QQ	China	**http://kapatu.com/shinswag/1429976589http://www.surfinginmap.club/toplace/139712219917908**
Instagram	Australia/ China	**http://ink361.com/app/users/ig-4170622428/ootdsports/photos**

Because OOTD sells not only to Australia but also into China (which offers a nice twist to the common perception that Australian and NZ businesses are undercut or disadvantaged by competition from China), Mimi has experimented with a range of different media platforms.

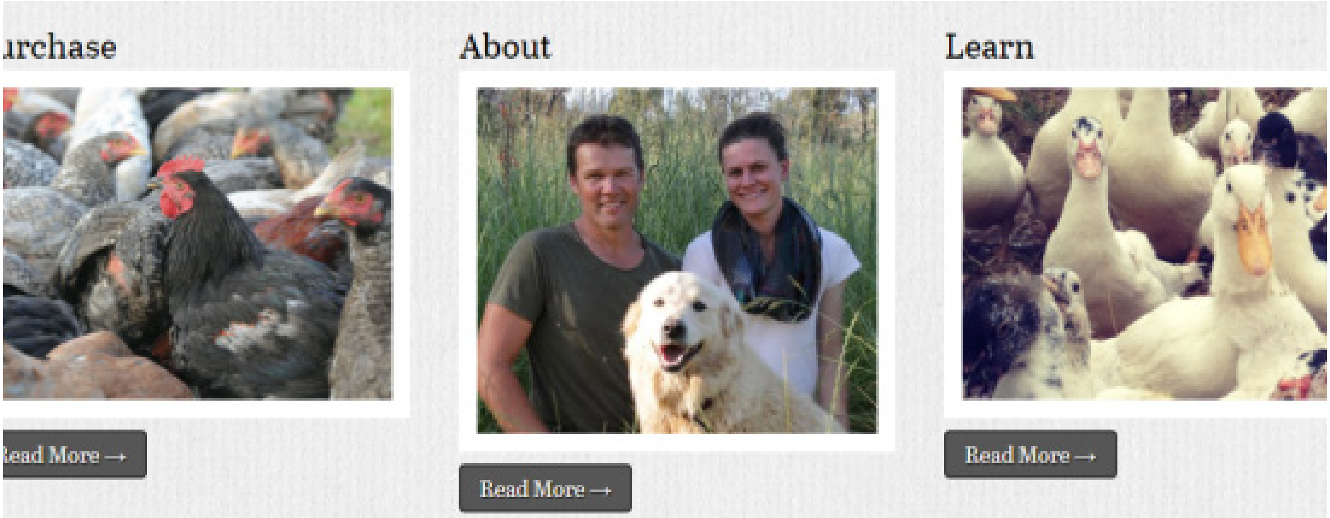
The result is that OOTD (as Mimi, the owner explains), is "basically built on social media." This has seen Mimi almost naturally and organically adopt a very sophisticated marketing strategy for its small size. This strategy sees her focus and play on emphasising the individual and personal nature of the business – building an almost individual online connection with literally 100s to tens of 1,000s of followers via her online activities. It appears that, with so much competition for their money, many consumers are now turning to small businesses because they offer connection with a real person – a key feature suggested as driving the move to the 'Orange World'.



Case Study 2: South Hampton Homestead

Moving from suburban Melbourne to the other side of the country, the notion of the future of work being enabled by technology to connect suppliers and consumers is further illustrated by a case study from Western Australia. Here, as illustrated in Figure 7 below, we find more evidence for the rise of 'The Orange World' Southampton Homestead illustrates an SME example of the motivation for building a business around a larger purpose - and how using social media can empower entrepreneurs to reach customers in a targeted and low-cost manner.

Figure 7: Excerpts from https://southamptonhomestead.com/



The use of Facebook in particular reveals the power of telling the story and connecting consumers to the 'why' of the business enterprise is an opportunity that small business could not afford or even dream about five years ago.

The importance of leveraging the social technology landscape will be a core competency and critical success factor for the small business owner going forward.

Case Study 3: Opaque Media

Another case study points to some of the issues faced by SMEs with the transition to a technologically enabled world. Opaque Media (**http://www.opaque.media/**) provides insight into the interaction of a high growth small business with the regulatory environment geared for traditional goods and services within a non-digital world. The fact that Opaque Media Group often operate at the forefront of the digital world, both in terms of the product they produce and - the way that they work, means that compliance with current workplace regulation can be difficult, time consuming and sometimes incredibly frustrating. The other side is that they are also dealing in an area where there is no regulation and it is their own deep sense of ethical considerations that may well be leading the way.

Technology lies at the heart of the success of Opaque Media Group's products and their way of work. It also provides one of the greatest barriers when we look at the infrastructure it is predicated on. For instance, while collaboration with NASA will often see the Melbourne based team working through the night and into the morning to be able to work together with their American based partners, low internet speed at the Australian end can be a significant frustration. As Director and Design Lead of the Opaque Media Group, Liam McGuire noted, while they often work in what is considered 'state of the art' here:

> "We are literally on the campuses of universities of technology here, we work through copper ...and if we can get four separate copper connections piped into our office, we gain 20 megabits per second, download speeds in addition to compromising our ability to collaborate internationally, this is barely enough for modern internet-enabled or cloud-based applications to run (let alone operate efficiently).

The American network "operates at a significantly faster speed than Australia" while "new developments like FTTN NBN will further enforce this gulf between other nation's infrastructure capabilities and our own" and this has important ramifications for Opaque as a company. The incredible visual quality and detail of their products are what makes them so successful.

One aspect of this is from the consumer end where the company sees Australia's internet infrastructure's compromising their work comes in the form of cloud-based tools such as version control, transfer/backup or productivity software tools. They are unable to use many of these tools either at all or to their fullest potential (especially compared to their international counterparts) due to the extremely poor latency and bandwidth that even "business-tier" internet in Australia often provides. This means they must accept compromises in efficiency, capability, or quality of their work as a direct result of our geography and political context.

Another aspect of the potential barriers SMEs may face in the future is evidenced in the difficulty Opaque already face in terms of the ability to access new technology. Here Liam cited the example of AR headsets – where they were the among the first in Australia to receive the HoloLens and were the first to get the Vive VR headset direct from Microsoft, they had been widely available in the US for some time (to the point of US Universities having excess stock piled up in storage rooms!).

The view of technology as enabling SMEs to not only compete but to also be more efficient can be illustrated in the example of Australian Renovation Group ARG (**http://www.arg.com.au/**). With the increased time and resources that need to be allocated to regulatory relationships, ARG cites technology as their "saving grace" in allowing them to continue growing, achievement more and get the work done. Director Stuart Redwood notes the emergence and application of both 3-D design technology and client management software packages as helping the business immensely:

> "Normally the business development comes from me and spreads out. But this one has come from the backend and spread forward…The fact that our clients can chat to the office at any time they like, and our supervisor has an iPad that is constantly updated. [For] construction, that's been a great leap forward" … "The office is quieter and nothing's ever lost now. We always used to have the scenario of contract notes 'Stuart said this, I said that, you said this, I didn't say that'. Well, now it's all documented."

The role of technology has become integral to streamlining and enhancing business both in terms of record-keeping and design and, unlike the concerns noted by employees in the survey results of the last section, has not seen any staff redundancies but rather, has led to job enrichment.

Case Study 4: Demand.Film

The final qualitative example of glimpses and suggestions for the future of work is provided by Demand.Film (https://au.demand.film/), a Perth-based start-up that applies a crowdsourcing model to the distribution and screening of independent films. Through the use of enabling technology such as digital and mobile technologies, Demand.Film exemplifies the move to the ongoing re-imagining and transitioning of the workplace. Entrepreneur and co-founder David Doepel describes the business as *"the Airbnb of cinemas":* Demand.Film owns no buildings and anyone with a film interest can host a screening *"It's sort of loose affiliate; anyone can join in and host a screening".*

Demand.Film provides a selection of independent films and these are listed on the Demand.Film website. Any person or organisation can sponsor a film, create an event around it and promote it through their own social media networks and the online community. Demand.Film then reserves the cinema, manages ticketing and ensures delivery of the film. If enough people buy a ticket, the event happens. The break-even threshold has been determined and the film screens if enough tickets are sold to cover the costs.

The employment model behind Demand.Film reflects a growing trend for many small businesses of a small number of core staff, supported by a network of freelance contributors. The online and global nature of the business lends itself to engaging freelance and contract-based team members with specific skillsets. The core team is based in Denmark, Western Australia, with the graphic designers in Perth, the server platform is in Singapore and Doepel's key business partners are based in Los Angeles.

> "There is a lot more outsourcing of labour and staff because it's all online. Despite the access to a global talent pool, even with this virtual, networked freelancer model, the business has largely been built and run out of Australia…and it's globally competitive."

The advent of enabling technology such as automated processes, digital platforms and highly leveraged social networks have been critical to the success of the business. This access to diversified talent cannot be underestimated. Demand.Film can source people from various backgrounds and skills beyond their own close network to expand in new cities and geographies. This allows the organisation to get local knowledge in certain markets and sourcing becomes almost unbiased as it is based on skill and value contribution a contractor or freelancer can make.

However, as with our Opaque Media example, the speed and reliability of technology are barriers with Doepel noting the poor state of this infrastructure in Australia as being the key challenge:

> "the abysmal state of the NBN and the infrastructure in Australia…is the biggest impediment to success of our business here. In the UK, all of the films we deliver to cinemas are downloaded. In Australia, they go by DHL [courier] on a hard drive."

Doepel also provided insight into the changing labour market and employment practices of businesses that align well with those proposed in 'The Orange World' envisaged by PwC (2014). Indeed, he indicates a preference for the networked freelancer model, as distinct from traditional employer /employee model:

> "We had a small business but a larger company in the [United] States in the 90s when we had almost 50 employees there and coming out of that experience, I never actually want that again. I don't like having the obligation of all those people. It's hard to be nimble or adapt to changing circumstances if you've got a big payroll and a sort of lumbering expense around rent, and the rest of it. It's not how we want to be in business."

Although we may regularly hear of a high proportion of any given workforce driven by the desire for freedom and flexibility, equally present is a similar desire for freedom, agility and flexibility on the part of the business or employer. There is a prevailing desire to continue to opt for a small number of core staff, with other roles continually provided by a supportive freelance community:

> "Right now, we have one employee, we have partners, we have contractors- and others. I imagine that we would at, say … $50 million revenue we might have between 5 and10 [full-time] people, actually on the payroll."

Nevertheless, it is not a "race to the bottom", as Doepel noted, pointing to one criticism of freelancing being associated with cheap labour simply to get a job done. Although this employment model of the future differs from more traditional direct employment models in design and delivery, the underlying drivers for consistency, performance and connectivity remain. Doepel refers to this as "value classing" and shares an experience of working with a freelancer who bid on some work but came in, to his mind way too low given her skill and expertise:

> "I said that her bid wasn't high enough but we'd hire them and we were going to pay them twice that amount, because we wanted the person for the long term…I think there's an ethics that drives that."

This highlights that the freelancer model still needs to provide some sort of ongoing employment incentive to attract the best talent and skills. Working out ways to have long term relationships with freelance participants will depend on what specific skills are important to the business and at what phase in its development.

> "It is one thing to get a one-off logo designed by a graphic designer in the Philippines who bid for and won the work; it is another to have an ongoing relationship with the coders whose work delivers the very foundations of your digital business or the graphics agency that is responsible, long-term for the look and positioning of the company."

If the freelanced, and less predictable nature of work for employees and contractors becomes a feature of the modern workplace in Australia like it is for Demand. Film, it arguably changes the very notion of a 'workplace' altogether. Some workplaces will evolve and in select circumstances, shift the concepts of a workplace we know today.

In the case of Demand.Film, the term 'workplace' seems outmoded and superseded by a series of 'virtual workplaces' that exist in multiple countries. There is of course a key relationship-based component to Demand. Film – being physically present at film festivals, meeting filmmakers and building relationships, *"It's a very human activity built on trust, which is done by people to people."*

This offers some hope to the concerns noted in the literature (see for example Watson et al., 2003) as well as employees in our survey. It appears that even the most networked, virtual and online businesses must know when human interaction plays its part. Doepel notes that in his business, they are well aware that "a*s principals we need to physically be at film festivals, we need to meet filmmakers, there's no substitute for human interaction, relationships and friendships with cinemas."*

Summary of Case Studies

Overall, this qualitative section has presented five examples from the 15 case studies where all were optimistic about the future of work but also all expressed concerns.

The key takeaway points about how they envisaged their future are:

- Recognition of the increasing importance of social media and of the need for a human touch to underscore any use of technology. This is not only part of how SMEs are conducting business but often also about the way government and big business are interacting with them. This 'human touch' is often part of the competitive advantage an SME has over larger business rivals. However, it is also increasingly absent from the business-to-business interactions SME owners have with larger and government agencies and here it often operates as a negative.
- Added to this was a strong message of push back from SMEs - that Government regulation and compliance will need to become more intelligent, better designed, targeted and delivered by regulators as a supportive and informative asset rather than being simply enforced.
- Small business owners also need information – about new technology and the changes occurring but also how to work at the local level through to the international community. They need help in sharing ideas and utilising the information and communications technologies that are the future of work for all. This is an important role for government to fill but one where they also need to work on building credibility and trust.

CONCLUSION AND RECOMMENDATIONS

Attempting to predict the future is both challenging and fraught with risk. The main factors likely to shape the future of the workplace are globalisation, technology, the changing demographic profile of the workforce, societal attitudes, environmental change and government policy (Ware and Grantham 2003; Gratton 2010). We have examined a number of future scenarios and seen that some are optimistic, offering a view that globalisation, technology and diversity provide an opportunity to embrace change and build an excellent labour market with matching enterprises (Hannon, 2011). Others see these same forces as creating the potential for a more dystopian vision and a world of work characterised by high unemployment, low wages and impermanent, less predictable jobs (Watson *et al.* 2003).

In general, there is agreement that work will become more flexible and mobile and that technologies will play a key role in enabling the future workplace to be redefined in terms of location and time (Humphry 2014; Moore 2016). This will see work increasingly defined less in terms of position, title or place, and more in terms of outcomes or achievements. The workforce of the future will be more diverse and technologies have the potential to make it easier for currently marginalised employees (e.g. older workers, the disabled) to participate. However, the wider implications of a mass move away from institutionalized work settings hold as many challenges as it does opportunity. Issues such as protections – for employer and employer, intellectual property rights and data security being just some of the issues raised during the research project.

Some futuristic forecasts, such as that by PwC (2014), suggest that the future workplace may be found in one of three "worlds" comprising large global corporations driven by market share and profit, socially responsible organisations and SMEs. The research undertaken for this study indicates that these "worlds" of work already exist and the majority of workplaces are at least aware of if not actually transitioning into one of these three paradigms.

The pervasiveness and importance of SMEs within the Australian and NZ business ecosystems make it tempting to predict the rise of the "Orange World" as the dominant one for the future of work. However, our evidence for this is limited and what we have found suggests that we currently really know too little about the SME workplace to offer such an insight. Instead, what we can offer is that whatever does eventuate, it seems likely that at the individual level at least, we all have much to learn from greater examination of SMEs. One feature that has come through very clearly is that employees of the future will need to show a willingness and capacity to adapt to change, learn new skills and potentially adopt a "portfolio" career, which might include periods of self-employment.

Recommendation 1:
REGULATION

While Government will continue to play an important role in shaping the future of the workplace as it has done throughout our history, regulation in the workplace will need to adapt and shift more towards a facilitative model.

Attention will also need to be given to the needs of the SME sector, which is likely to be increasingly comprised of "nano" or micro-enterprises as such firms will not be best served by legislation and regulation designed for large organisations.

Recommendation 2:
ESTABLISHING TRUST AND LEADERSHIP

Many of the suspicion and doubts about the ability of government to provide leadership seem to come from the lack of an SME presence or voice in the committees, organisations and institutions where decisions are being made.

Having a formal SME presence as well as dissemination channels which includes the wide and diverse cohort necessary to ensure SMEs can be/are involved would start the process of building trust and establishing an authentic leadership role for government

An examination of the Australian Workplace Relations Survey (AWRS) database indicates that well-educated managers and small business owners who, in the case of the SMEs, offer a largely positive workplace environment generally lead NZ and Australia's workplaces. However, discussions with small business owners, and our large-scale survey of employers and employees, highlight the intensely personal nature that small business has for many SME owner-managers. This should not be surprising, but it highlights what is often an important difference between workplace relations within small and large firms.

As far as the future of the workplace, the majority of small business owners viewed the future of work for themselves as one of excitement and change, however this excitement was tempered by some doubts. These doubts focused very heavily on government, and a perceived inability to provide leadership, in particular the application of technology in a manner likely to enhance the growth of the small business sector.

These concerns were further borne out in our survey findings where employers or employees did not generally view workplace regulation (WR) in a negative light, but micro-businesses, and particularly nano-businesses, were less likely to see the benefits of these things. Such firms comprise around 88 per cent of all businesses in both NZ and Australia, and the survey data highlights their difference from larger firms.

Recommendation 3:
RECOGNITION

Again, this perceived lack of benefit from the workplace relations system is a difference that reinforces the message that government policy and regulators need to be aligned to respond to the needs of nano and micro workplaces, rather than adopting a 'one jacket fits all' approach.

This requires formal recognition that Small business is not 'little big business'

The data also highlights the importance of recognising that diversity will involve the management of a future workplace where many employees are seeking better work-life balance, or are self-employed sub-contractors. These individuals will have different goals, motivations and needs. Most importantly, the survey also points to the impact of technology on the future of the workplace. This will potentially transform the nature of work and the time and place dimensions of what a workplace is.

Although it is difficult to forecast with any certainty, the consistent pattern that does emerge is that both employers and employees have a common understanding that technology will be a key driver for future change. For some, this presents an opportunity in which they will be liberated from existing time and place rigidities. For others, the future seems bleaker, with fears of fewer jobs, and less opportunities for higher pay and conditions.

Further, the ability of employers and employees to collaborate with each other over the nature, scope and timing of work, as well as reaching mutually beneficial "win-win" outcomes, is a very real opportunity if managed correctly. Both NZ and Australia will need to draw on the skills and talents of all its population, and apply innovative thought and action, in order to generate the necessary productivity required to maintain international competitiveness for economic growth.

Recommendation 4:
FAIRNESS AND EQUITY

Building on the three recommendations above is the need for current issues such as timely payment of invoices and fair contract terms to be applied to SMEs by both larger business and by government (with the latter speaking very much to the spirit of Recommendation 2 in particular), to ensure mutual benefit for all is more than words.

In summary, this "bright future" option is very much within the grasp of the SME workplaces in NZ and Australia workplaces if a mutually beneficial, collaborative approach to work can be developed.

Workplace regulation is generally a response to a failure by employers and employees to work together for the mutual benefit. How willing they are to collaborate in this way to achieve the positive outcomes that are possible will depend on the attitudes that employers and employees have now in relation to these issues.

The extent to which small businesses and those who work in them can secure a mutually beneficial, bright working future will in substantial part be determined by the approach of government. Intelligent, effective, facilitative regulation of work will support rather than seek to hinder the evolution of work in both nations and maximize the opportunity for both NZ and Australian SMEs to secure win/win outcomes and improved workplace relations.

The characteristics of any future workplace will also depend on the nature of the work that needs to be undertaken there. Some industries will adapt to, and embrace technology and use it to enhance their growth and opportunities. Others will face potential serious disruptions that may see the loss of jobs.

Yet the apparent key factors shaping this future are the growth of digital technologies, automation and artificial intelligence, and the convergence of technology and flexible or networked organisational structures that will use such technologies to change the nature of the workplace from a time and place perspective.

The future of the SME workplace in both NZ and Australia will be shaped by a combination of forces. Each will have its own impact and will offer both opportunities and threats to employees, employers and to the wider society that the world of work is situated in.

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