THE FUTURE IS FLEXIBLE
THE IMPORTANCE OF FLEXIBILITY IN THE MODERN WORKPLACE

Werk
WERK COMMISSIONED a professional research firm to conduct a comprehensive study on the state of flexibility in the U.S. workforce. The research sampled 1,583 white collar professionals who were determined to be representative of the U.S. workforce at large and spanned across industries, geographies, and other key demographics.

According to our research, there is a significant gap between the supply and demand of workplace flexibility—96% of the workforce needs some form of flexibility, yet only 42% have access to the flexibility they need, and only 19% have access to a range of flexible options. We were able to quantify this gap for the first time through the use of our proprietary flexibility framework which allowed respondents to report interest in and access to a standardized set of flexibility options. In this paper, we explore how the flexibility gap is impacting the workforce’s health and wellness, performance and productivity, and ability to care for others. The study also examines the demand for distinct flexibility types.

While specific flexibility needs vary among employees, we found that the most in-demand flexibility type for all demographics is the option to work away from the office for some portion of each week. Our study also highlights differences in the supply of and demand for flexibility across genders, generations, and organizational levels.

The research quantifies the impact of flexibility on organizational metrics like retention, engagement, and employee net promoter scores (eNPS). Most notable was the finding that employees with access to flexibility have net promoter scores 48 points higher than those without access to flexibility.

Finally, we provide a practical path forward for companies who are ready to make the leap towards a more flexible future of work.
About the research

Werk commissioned a professional research firm to conduct a comprehensive study on the state of flexibility in corporate America. The research sampled 1,583 white collar professionals who were determined to be representative of the U.S. workforce at large.
THE WORLD OF WORK looks radically different than it did a decade ago. We’re living in a time of technological transformation, accelerating connectivity and demographic shifts. And while many of the innovations that we’ve seen over the last decade have improved workplace efficiency and fluidity, the fact that we’re more connected than ever through technology means that people are working longer hours with less time to take care of themselves and those they care for. This new normal impacts employee health, happiness, and productivity.

Companies are becoming increasingly aware that they must adopt a more human-centric view to succeed in today’s modern landscape, one in which their employees’ needs are front and center in all that they do. This values shift explains the recent rise in employee wellness programs, better parental leave policies, extended vacation days, and more.

And yet innovation in terms of how the workplace and jobs are structured has been slow. If companies are going to truly adapt, stay nimble, and poised themselves for growth in the Human Era, they must reconsider the fundamentals of how jobs are designed and how, where, and when work gets done. Work needs to be redesigned to accommodate the complexities of modern life—without sacrificing the stability, support, and opportunity for promotion that are the hallmarks of traditional full-time jobs. It’s time to reimagine the workday.

Welcome to the Human Era

THE MODERN WORLD REQUIRES A NEW EMPLOYER-EMPLOYEE COMPACT
A common understanding of flexibility is needed to interpret the implications of this research. We define flexibility as follows: A flexible job is a full-time W2 role with a structured set of time or location-based modifications that ensure high compatibility between the needs of an employee and the employer.

To be effective, time and location-based modifications must be standardized within a framework that can be broadly communicated across an organization. Our framework is comprised of 6 distinct flex types. When a company adopts and effectively communicates a standard framework for flexibility, ensuring that all employees have equitable access to those flexibility types, we say that company has a “structured flexibility program.” This framework is the foundation for this research—it allowed us to capture structured data on flexibility for the first time. Throughout this paper, we will refer to the flex types as defined on the next page.

Flexible jobs and gigs are fundamentally different. A flexible job is a full-time W2 role with a structured set of time or location-based modifications. Structured flexibility optimizes employee productivity and loyalty across genders, generations, and skill sets. The gig economy, on the other hand, is a labor market of short-term contracts and freelance work as opposed to permanent jobs. While gigging is flexible in nature, it is not the same as structured flexibility and is a failing proposition for some employee demographics: high fixed costs of living like child care, unpredictable revenue, and a limited opportunity to leverage earned social capital into a promotion make the gig economy an insufficient solution for many. Unlike gigging, structured flexibility provides the support and stability of traditional workplaces.
A flexible job is a full-time W2 role with a structured set of time or location-based modifications. We have standardized those modifications into a framework consisting of 6 flex types. The flex types below are meant to be used in combination—the average employee needs access to 2.5 types of flexibility.

- **PartTime** employees work on a reduced hours schedule. PartTime does not mean an individual is no longer in an advancement track role—employees utilizing PartTime have the experience and skills to meet their objectives on a reduced hours schedule.

- **MicroAgility** employees have the autonomy to step away from their work to accommodate the unexpected in micro increments of 1-3 hours. Employees are responsible for communicating their plans and meeting their daily objectives.

- **Remote** employees do not work at a company office—they can work from anywhere. While many Remote arrangements are fully location independent, some may have location considerations, such as the need to attend occasional in-person meetings or service a region.

- **TravelLite** employees have minimal to no travel, with a maximum of 10% travel annually (2-4 days per month or its annual equivalent). TravelLite employees can reduce travel requirements by utilizing virtual meetings.

- **DeskPlus** employees are based out of a company office, but can work at a location of their choosing for some portion of their time. Utilizing location variety can enhance productivity, reduce the burden of a long commute, increase creativity, and/or meet other needs.

- **PartTime** employees work on a reduced hours schedule. PartTime does not mean an individual is no longer in an advancement track role—employees utilizing PartTime have the experience and skills to meet their objectives on a reduced hours schedule.
The Flexibility Gap

According to our research, there is a significant gap between the supply and demand of workplace flexibility. 96% of employees in the U.S. workforce need some form of flexibility at work, yet only 42% have access to the type of flexibility they need, and only 19% have access to a range of flexible options. This gap is even more pronounced for women, where only 34% have access to the flexibility they need.
To better understand the flexibility needs of the workforce, we used our flexibility framework to look at how supply and demand varied for each distinct flexibility type. The data revealed some interesting trends about which types of flexibility are most sought after, and which groups needed them the most.

### Overall Demand by Flexibility Type

<table>
<thead>
<tr>
<th>Flexibility Type</th>
<th>Demand</th>
<th>Supply</th>
<th>Gap</th>
</tr>
</thead>
<tbody>
<tr>
<td>DeskPlus</td>
<td>84%</td>
<td>84%</td>
<td>0%</td>
</tr>
<tr>
<td>Microagility</td>
<td>82%</td>
<td>82%</td>
<td>0%</td>
</tr>
<tr>
<td>Remote</td>
<td>78%</td>
<td>78%</td>
<td>0%</td>
</tr>
<tr>
<td>Timeshift</td>
<td>74%</td>
<td>75%</td>
<td>1%</td>
</tr>
<tr>
<td>Travellite</td>
<td>56%</td>
<td>62%</td>
<td>6%</td>
</tr>
<tr>
<td>Parttime</td>
<td>49%</td>
<td>54%</td>
<td>5%</td>
</tr>
<tr>
<td>Job Sharing</td>
<td>41%</td>
<td>48%</td>
<td>7%</td>
</tr>
</tbody>
</table>

### Supply and Demand Gap by Flexibility Type

- **DeskPlus**: Demand 84%, Supply 84%, Gap 0%
- **Microagility**: Demand 82%, Supply 82%, Gap 0%
- **Remote**: Demand 78%, Supply 78%, Gap 0%
- **Timeshift**: Demand 74%, Supply 75%, Gap 1%
- **Travellite**: Demand 56%, Supply 62%, Gap 6%
- **Parttime**: Demand 49%, Supply 54%, Gap 5%
- **Job Sharing**: Demand 41%, Supply 48%, Gap 7%

For information on our flexibility taxonomy, see page 15.

Although not part of Werk’s flexibility framework, we’ve shown job sharing here as a breakout of PartTime.
GIVEN THE 54% GAP between supply and demand for flexibility overall, it’s not surprising that we found significant gaps between the supply and demand of each flexibility type, indicating that companies are significantly under-delivering to their employees across every flexibility type.

**KEY INSIGHTS**

- **DeskPlus** is the most in-demand flexibility type, indicating that today’s workforce values location-based flexibility, including access to location variety throughout the workweek, above any other flex type.

- **Microagility** is the second flexibility type with the greatest demand, suggesting that traditional workdays are too inflexible to accommodate ad-hoc appointments or unexpected life events, or that bias or fear prevents employees from stepping away from work when necessary.

- **Parttime and Jobsharing** (a version of PartTime where an individual splits his or her working hours with a colleague) were the least-demanded flexibility types, suggesting most employees need or want to commit to a full-time role. Interestingly, men, millennial men in particular, had the highest interest in PartTime work. This is likely due to the fact that changing family structures are contributing to men taking on an equal or larger load of caregiving and housework responsibilities. We’ll explore this trend in greater depth below when we look at flexibility and its impact on caregiving more broadly.

- **Men** were more likely than women to believe that flexibility is offered consistently to all employees across their organization. This may be due to a gender bias effect in which women are more reluctant to ask for flexibility than men because of stigmas associated with workplace flexibility. Or, that men’s requests for flexibility are more likely to be granted.

- The higher the respondent’s organizational level, the more likely they were to have access to flexibility, with Senior Management reporting significantly greater access to flexibility compared to entry-level employees. This is particularly important because it indicates that executives may be disconnected from the needs of their employees and may incorrectly assume that all employees, no matter their seniority, have equal access to flexibility.

**WE SAW INTERESTING TRENDS ACROSS DEMOGRAPHICS IN TERMS OF HOW EMPLOYEES PERCEIVED THEIR OVERALL ACCESS TO FLEXIBILITY**
Room to Lead

Which types of flexibility will give your company a competitive advantage?

Based on the gap between supply and demand for each flexibility type, the figure to the right indicates which flexibility types will give your company room to lead, which types can be leveraged as points of differentiation, and which types can be deprioritized. It’s important to note that this analysis is based on U.S. aggregate workforce data, and priorities might look different in your unique company setting depending on your employees’ needs and the types of flexibility you offer today.
Our data tells a clear and quantifiable story about the gap between the supply and demand of workplace flexibility, but we also wanted to understand the impact of that gap on the U.S. workforce at large.

The research identified 3 areas that are negatively impacted when employees lack access to flexibility:
Caregiving

Our data suggests that lack of flexibility places a significant burden on working parents.

*The structure of my workday makes it somewhat/very challenging for me to...*

- **33%** of parents agree
- **33%** of mothers agree
- **33%** of fathers agree

- **31%** of parents agree
- **27%** of mothers agree
- **35%** of fathers agree

- **34%** of parents agree
- **35%** of mothers agree
- **33%** of fathers agree

- **29%** of parents agree
- **28%** of mothers agree
- **31%** of fathers agree

- **30%** of parents agree
- **26%** of mothers agree
- **33%** of fathers agree

**Family structures** look much different than they did a century ago when men served as breadwinners and women tended exclusively to the home and childcare. Today, more women are choosing to stay in the workforce after having a child, and the ranks of stay-at-home or single fathers has grown significantly in recent decades.1 These more evolved gender norms are particularly salient amongst millennials who are in the midst of a baby boom, requiring companies to think about how they can support both genders equally in their transition into parenthood. As the data illustrates in previous sections, millennial men are particularly keen on exploring flexibility as a way to take on a more equal load of caregiving responsibilities.

Interestingly, the data also suggests that mothers face fewer structural challenges than fathers. One possible hypothesis for this result is that because women are still more likely than men to be primary caregivers, they must find ways to overcome or circumvent barriers to meet their caregiving responsibilities. However, this often comes at a career cost: a phenomenon sociologists have named the motherhood penalty.2 But it’s not just about parenting—recent research shows that millennials are also taking on an even larger role as caregivers more broadly, with the average millennial caregiver spending an average of 21.2 hours a week assisting a loved one whether that be a parent, grandparent, or sibling.3
The structure of work was decided long before women made up a significant part of the workforce, when the typical American family consisted of one primary breadwinner. The inflexibility and one-size-fits-all nature of traditional full-time work continues to disproportionately disadvantage ambitious women by forcing them to leave the workforce, or “opt down” into non-leadership roles, in a choice between care and career. As a result, many organizations have been unable to achieve their gender diversity goals, especially in positions of leadership. Flexibility is a talent solution that addresses these diversity challenges. Of the 30% of credentialed women who leave the workforce, 70% say they would have stayed if they had access to flexibility. Achieving gender parity is a business imperative. Companies with meaningful numbers of women in leadership improve by every metric and gender diverse organizations are 15% more likely to outperform their peers.

*In each case study, names and identifying details have been changed to protect the privacy of featured individuals.
Health + Wellness

Our research shows that lack of flexibility has a significant impact on employees’ ability to engage in preventive health measures.

Corporate health and wellness programs have proliferated over the last decade as companies have sought to control healthcare costs. Originally believed to be the key to employee health, these programs spawned an $8 billion wellness industry, and yet few companies have seen notable improvements in health outcomes or reduced healthcare costs.* The problem with existing programs is that they aim to address poor health and wellness by adding incentives for being well rather than removing the barriers to being well. If an employee doesn’t have the flexibility to attend a recurring appointment that conflicts with standard working hours, no incentive is going to enable that employee to effectively manage their condition.

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MEET WILL, a marketing manager who has a disability. For his particular disability, he must receive frequent specialized medical treatments to maintain his physical health. His specialist closes every day at 5 p.m., so scheduling these sessions after work is not an option. However, the appointments are quick enough that he can leave the office and return to his desk within 1 hour. Without access to MicroAgility, Will’s physical and mental well-being, as well as his productivity, suffer.

As companies implement flexibility policies to address matters of disability, it's important to remember one-size-fits-all flexibility policies will be insufficient. For example, someone who uses a wheelchair and relies on public transit may need access to TimeShift to avoid travel during peak times, and someone with a chronic illness may need access to DeskPlus during a flare up. If employers design programs that meet employee needs, the results will speak for themselves.

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According to The Wall Street Journal, "social distancing" measures during the 1918 flu pandemic made the difference between high and low mortality rates in U.S. cities. David Gray, a former acting assistant secretary at the U.S. Department of Labor, says that during outbreaks "it is likely that many workers will be sick enough that they will need to stay away from work, if only to keep their coworkers from being impacted, but they will be well enough to complete substantive work. Or many will be healthy themselves, but they will be needed at home to help care for a family member or a child." Remote and DeskPlus are two flexibility factors that can facilitate life-saving social distancing, and MicroAgility can help give employees time to schedule flu vaccines and monitor their overall health—not just during flu season, but all year round.
Productivity

Our research shows that lack of flexibility also negatively impacts the performance and productivity for a third of the workforce. The structure of my workday makes it somewhat/very challenging for me to...

Employees’ ability to care for themselves and others is a fundamental need that companies have a responsibility to facilitate in the Human Era, but what about the impact of flexibility on productivity and performance? Our findings underscore why flexibility is not just about meeting basic needs, but also about empowering employees to work in the ways and at the times that are most productive for them. Access to flexibility can create a thriving and resilient workforce that performs at a high level, sustainably over time. This is why flexibility must be considered a universal talent solution, not just one that addresses the discrete needs of employees who will fail without it. It’s interesting to note that women reported fewer structural challenges to productivity and performance. One possible reason could be that there are fewer women in leadership positions and therefore the data does not accurately reflect the unique challenges facing women in more ambitious roles.

- **Perform optimally in my role**
  - 29% of people agree
  - 31% of men agree
  - 31% of women agree
  - 27% of millennials agree
  - 28% of Gen X’ers who agree
- **Perform in a sustainable way over time**
  - 29% of people agree
  - 31% of men agree
  - 28% of women agree
  - 34% of millennials agree
  - 26% of Gen X’ers who agree
- **Feel inspired or energized by my physical workspace**
  - 37% of people agree
  - 36% of men agree
  - 37% of women agree
  - 40% of millennials agree
  - 34% of Gen X’ers who agree
- **Bring my whole self to work**
  - 29% of people agree
  - 30% of men agree
  - 27% of women agree
  - 32% of millennials agree
  - 26% of Gen X’ers who agree
- **Foster skills to develop in my career**
  - 32% of people agree
  - 34% of men agree
  - 30% of women agree
  - 33% of millennials agree
  - 31% of Gen X’ers who agree
Productivity in Action...

Meet Ryan, Director of Engineering for a tech company headquartered in the Bay Area. Ryan has been with her company for 7 years and loves her job. Ryan started out as an individual contributor who was quickly promoted through the managerial ranks. Ryan now has 6 direct reports, and while she has continued to be successful, she’s struggling to balance her “manager time” and her more technical “maker time.” Ryan finds that when she’s in the office she is constantly being interrupted by her team with requests or issues, which can significantly disrupt her flow on “maker” days. She’s also heard from a few of her direct reports that the office setting can be distracting and not conducive to coding. As a solution, Ryan recommends a DeskPlus policy for those team members (including herself) who need a reprieve from the office environment to optimize their making time.

According to a recent study by Stanford Graduate School of Business professor Nicholas Bloom,1 the ability to work outside the office has a significant impact on employee productivity. To determine the effects of location variety, Bloom and his co-researchers, James Liang, John Roberts, and Zhichun Jenny Ying, studied Ctrip, China’s largest travel agency. Half of the volunteers for this study had access to location variety 4 out of 5 days a week for a total of 9 months, while the other half worked solely in the office. The results were staggering: the group that worked outside of the office had a “massive” performance improvement of 13%, and resignations among this group dropped by 50%. Why? First, those with access to location variety are more likely to work their full shifts as opposed to office workers who might actually clock fewer hours due to long lunches with co-workers or sitting in traffic. Second, Bloom concludes that these employees are able to concentrate better since offices can be noisy or distracting.

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Location Variety and Productivity
Minding the Gap

barriers to wellness and preventative health can drive costs down not just through reducing absenteeism, but by reducing healthcare costs overall. The average company spends upwards of $10,000 per employee on healthcare, and those costs are increasing due to drivers like high-priced pharmaceuticals. Flexibility allows employees to prioritize preventive healthcare, which can reduce acute health issues, decrease absenteeism, and help manage escalating healthcare costs.

PRODUCTIVITY
Employees with access to flexibility are more productive and can work in ways that truly enable sustainable high performance. Given that 29% of people said that the structure of their workday makes it difficult for them to perform optimally, flexibility can be a key lever in optimizing their performance. When it comes to balancing “manager time” vs. “maker time,” flexibility can enable employees to re-invest in maker time, resulting in increased productivity and innovation.

TURNOVER
Our research found that employees without access to flexibility are 2x more likely to leave their job for a more flexible alternative. Turnover has a tremendous financial impact on organizations in terms of short-term productivity losses and longer-term costs associated with hiring, onboarding, and optimizing new hires. It is much less expensive for a company to retain an employee than hire a new one.

ENGAGEMENT AND SATISFACTION
Our study showed that employees without access to flexibility are 2x more likely to be dissatisfied at work. On the other hand, employees who do have access to flexibility have employee net promoter scores (eNPS) 48 points higher than those without access to flexibility. This is a staggering number as eNPS correlates not only with the engagement and retention of talent, but also with the likelihood that employees will advocate for their company’s products and services, which drives top-line dollars.

HEALTH AND WELLNESS
And then there’s the impact on health and wellness—39% of millennials and 36% of employees overall say the structure of their workday prevents them from making time for healthy living. Companies that remove barriers to wellness and preventative health can drive costs down not just through reducing absenteeism, but by reducing healthcare costs overall. The average company spends upwards of $10,000 per employee on healthcare, and those costs are increasing due to drivers like high-priced pharmaceuticals. Flexibility allows employees to prioritize preventive healthcare, which can reduce acute health issues, decrease absenteeism, and help manage escalating healthcare costs.

QUANTIFYING THE IMPACT OF THE FLEXIBILITY GAP ON BUSINESS OUTCOMES
Our research clearly shows that access to flexibility has a positive impact on how employees care for themselves, care for others, and maximize performance and productivity. But what about other organizational outcomes? How does providing access to flexibility impact a company’s top and bottom line?

GENDER DIVERSITY
A lack of flexibility is one of the top reasons women leave the workforce, and flexibility is a woman’s #1 search criteria in looking for a new role. Our research found that the flexibility gap was most pronounced for women: 95% of women need access to flexibility, but only 34% of them have access to the flexibility they need—at 61%, this is the largest flexibility gap among any employee demographic. Previous research also has shown that of the 30% of women who drop out of the workforce after have a child, 70% would have stayed if they had access to flexibility. Companies with a more gender diverse workforce tend to make better decisions that are more representative of/inclusive to the customer populations they serve. Research shows that companies with more women are more likely to introduce radical innovations into the market.

AN INCLUSIVE WORKPLACE
Flexibility can facilitate further diversity by creating workplaces that support all people...
inclusive of race, color, religion, sex, sexual orientation, gender identity, national origin, disability status, socioeconomic status, and work style more broadly. We found that employees with access to flexibility are 20% more likely to believe they work in an environment that fosters diverse points of view. Taking the time to recognize employee needs can increase an employee’s sense of belonging in an organization, which is essential in any diversity initiative.

**EMPLOYER BRAND**

Once a company has implemented structured flexibility, it can be leveraged as a differentiator to attract the best talent. Of the companies who are doing flexibility well today, few are proactively marketing their flexible programs as part of their employer brand. Many make the mistake of waiting for employees to join before communicating what’s available to them. Given that flexibility is a top search criteria for all employees, companies that can effectively leverage flexibility as part of their talent attraction strategy will be at a unique advantage.

**REAL ESTATE PLANNING AND OPTIMIZATION**

Understanding employees’ needs and appetite for flexibility can also support companies with workforce and real estate planning and optimization. As real estate costs soar, it’s beneficial for companies to understand what percentage of their workforce wants and needs location-based flexibility modifications so they can create the efficiently designed workplaces of the future.

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**ADVOCACY ▼**

$+48_{\text{eNPS}}$

Employees with access to flexibility had employee net promoter scores (eNPS) 48 points higher than those without access to flexibility. eNPS isn’t just a strong predictor of attraction, engagement, and retention, but is also directly correlated with a higher likelihood that employees will also be net promoters of their company’s products or services, which is linked to top-line dollars.

**RETENTION ▼**

Employees without access to flexibility were 2x as likely to report being dissatisfied at work, and 1 in 2 employees said they would leave their job to find a more flexible alternative.

**ENGAGEMENT AND INCLUSION ▼**

**EMPLOYEES WITH FLEXIBILITY WERE...**

- **16%** more likely to feel their ideas are valued
- **20%** more likely to believe they work in an environment that fosters diverse points of view
- **26%** more likely to believe their company is doing what it takes to improve gender diversity
- **20%** more likely to feel their employer cares about them and treats them well
STEP 1
Utilize a Flexibility Framework
To close the gap between the supply and demand for flexibility, companies and employees must speak the same language. A common framework or language for flexibility is needed for companies to articulate what is offered, and for employees to advocate for what they need. Without a common language, employees and employers tend to rely on the overly personal flexibility discussions of the past, which can lead to inconsistent implementation and low uptake.

STEP 2
Assess Needs
Too many companies fail at flexibility because they do not tailor their flexibility policies to the needs of individual employees, and instead create blanket policies that work for some, but not all. Instead, companies should conduct a thorough needs assessment to understand what employees’ lives and workdays look like, what their lives require of them outside of work, and which location and time-based customizations would address those needs (aligned to your flexibility framework). If you need help, Werk has tools that can support you with this assessment.

STEP 3
Create Customizations
Once you’ve determined which types of flexibility your employees require to better care for themselves and others and to perform optimally, you can begin to design programs and policies that create the customizations your workforce needs most. You may choose to start with the highest impact policies and roll out others gradually, or you may choose to offer all of the flexibility types upfront.

STEP 4
Communicate Broadly
Our research demonstrates that perceptions of access to flexibility vary across gender lines and job levels. Take the guesswork out of flexibility by communicating your commitment to a flexible work environment broadly, and by making information about the programs and policies available widely accessible. After you’ve communicated your policies internally, let the world know: your flexibility is a differentiator in your employer brand and talent acquisition strategies.

STEP 5
Measure Impact
Set yourself up to measure the impact of flexibility through key metrics. Our research indicates that flexibility has a significant impact on employee advocacy (eNPS), engagement, and retention. To quantify results, measure a baseline on these metrics before introducing flexibility. As you roll out your flexibility policies, pulse your employees regularly to capture new data.
Imagine a world where our workplaces have caught up to the demands of modern society, where every employee has the ability to customize their workday to meet their individual needs through structured flexibility programs. Imagine a labor market driven by a hybrid of our existing models: the support and stability of traditional workplaces, and the innovation and flexibility of the gig economy. In this new future, companies will unlock the talents, loyalties, and happiness of their greatest resource: their people. In return, people will be empowered to live and work in the way that works best for them. This future is upon us: companies and employees who adopt a standardized language of flexibility today will blaze the trail for the companies of tomorrow.


13. See footnotes 4 and 5.
