BUILDING A DIGITAL BUSINESS: OPPORTUNITIES AND BARRIERS

2018

Contents

Acknowledgements

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exec survey

The survey

The world is now digital. From the explosive expansion in data-driven service delivery to digitally disruptive business models such as Uber and Netflix that have fundamentally changed the way we consume products, the digital evolution is unavoidable.

As digital continues to advance, it's crucial that UK businesses can be confident in their ability to keep up to date with the latest trends and technologies. Yet recent research carried out by Gartner found that many still face barriers to embracing digital. The study revealed that while 62% of executives have a management initiative or transformation programme in place to build a digital business, their expectations for technology have changed due to difficulties and costs, amongst other factors.[1]

However, the study also found that a growing number of CEOs are concentrating on transforming their companies, including "a deeper understanding and movement to digital business".[2]

Across the UK, digital provides businesses with more opportunities that ever before to adapt and improve, ranging from the way in which they serve their customers to working practices in their organisation. So how this is being achieved?

In our latest research, we partnered with digital leader Virgin Media Business to examine the ways in which UK businesses are embracing the modern world of digital business, and the areas that are driving – or inhibiting – their progress. In particular, our study focused on:

- the functions and features organisations believe are essential for a modern business;

- the extent to which developments such as mobile working, the cloud and artificial intelligence (AI) are impacting business improvements; and

- the barriers businesses face as they look to achieve their short- and long-term goals.

[1] https://www.computerweekly.com/news/252440244/Digital-is-a-long-term-objective-CEOs-warned
[2] http://www.information-age.com/ceo-priorities-digital-business-123471729

About our survey partner

This survey has been commissioned by Virgin Media Business, which works with over 70,000 business customers in the UK, helping them fulfil their digital potential.

Survey methodologies and respondents' profile

This survey was conducted by Exec Survey in partnership with Virgin Media Business. The project ran from Thursday 15 March 2018 to Monday 16 April 2018.

Survey respondents represented a broad cross-section of roles across UK businesses. This included: Business Development, Business Management, Chairman, Chief Executive, Commercial, Contracts, Customer Services, Digital, Engineering, Finance Management, Human Resources, Information, Information Technology Lead, IT Management, Managing Director, Marketing Communications, Operations, Organisational Planning, Procurement, Programme Management, Projects, Regulatory, Risk, Sales, Senior Manager, Strategy, Technical Services, and Transformation and Change.

One hundred and six individuals from 96 unique organisations participated in the survey. Each respondent will have received a complimentary copy of the findings report. There was no inducement to take part in the survey, and Virgin Media Business was not introduced as the survey partner.

The results displayed throughout this report are based on the responses of those who fully completed the questionnaire, and are displayed as a percentage of this group unless explicitly stated otherwise.

Key findings

1 _____

The vast majority of survey participants (73%) label themselves as 'Digital Desirers' – they are beginning to adopt a digital agenda, but know that they need to do more.

Just 19% would refer to themselves as 'Digital Leaders', who see digital as the foundation of their business, whilst 8% state they are 'Digital Deniers', who still rely heavily on the use of traditional infrastructure.

FIGURE 1: Which of the following best describes your business's approach to digitisation?

8% Digital Denier – we still use traditional IT infrastructure and key barriers stand in our way to changing this

19% Digital Leader – we see digital as the foundation of our business

73% Digital Desirer – we have begun to adopt a digital agenda, but we know we need to do more
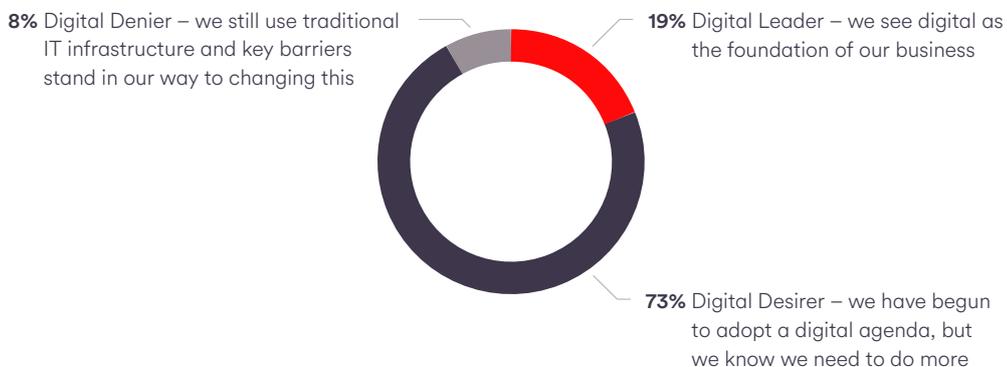
Interestingly, 78% state that they rely on insight and guidance from partners and suppliers to stay up to date with the latest trends in their industry, best-practice guidance and new technology. And despite a perceived focus in recent years on the importance of social-media channels, just 22% of participants told us that they use these channels for this purpose.

FIGURE 2: How does your business stay up to date with the latest trends and insights in your industry, best-practice guidance and new technology? Please tick all that apply.

Insight and guidance from partners and suppliers	78%
Industry events and conferences	75%
Consulting industry experts/publications	69%
Internal research projects	48%
Independent news pieces	39%
Social media	22%
Government-funded articles	21%
Don't know	6%
Other – please specify	1%
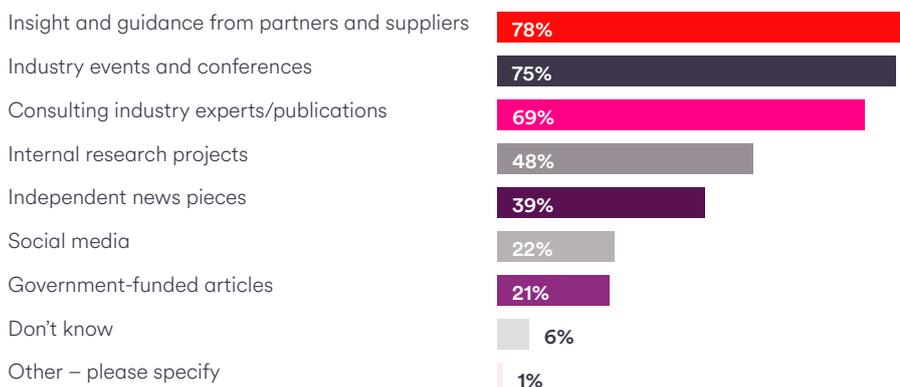
Looking at the external factors that participants believe will have the greatest impact on their business over the next 12 months, perhaps unsurprisingly over half (54%) cite government and political legislation (such as the General Data Protection Regulation) and the economic uncertainty due to Brexit (53%). Interestingly, just 25% report a concern about the rising number of millennials and Generation Z entering the workforce.

FIGURE 3: Which of the following external factors do you believe will have the greatest impact on your business over the next 12 months? Please tick all that apply.

| Factor	Percentage
Government and political legislation, such as the General Data Protection Regulation (GDPR)	54%
Economic uncertainty due to Brexit	53%
UK political landscape	43%
Global political landscape	30%
Sustainability and green agenda	27%
Millennials/Generation Z entering the workforce	25%
Reducing carbon footprint	17%
The potential for new trade deals	16%
Other – please specify	5%
Don't know	5%

2

The most common drivers for pursuing digitisation across the business are the need to modernise and future-proof (72%), and increase productivity and efficiency (72%).

Customer demand is also a significant area of focus, with 60% stating that this was a driver for digitisation. Interestingly, less than half (45%) cite reducing costs as a driver, and just 28% report that security concerns play a role.

FIGURE 4: What do you believe are the main drivers for pursuing digitisation across the business? Please tick all that apply

The need to modernise and future-proof	72%
Increasing productivity and efficiency	72%
Customer demand	60%
Reducing costs	45%
To keep up with competitors	38%
Attracting and retaining employees	31%
Security concerns	28%
Other – please specify	4%
Don't know	4%
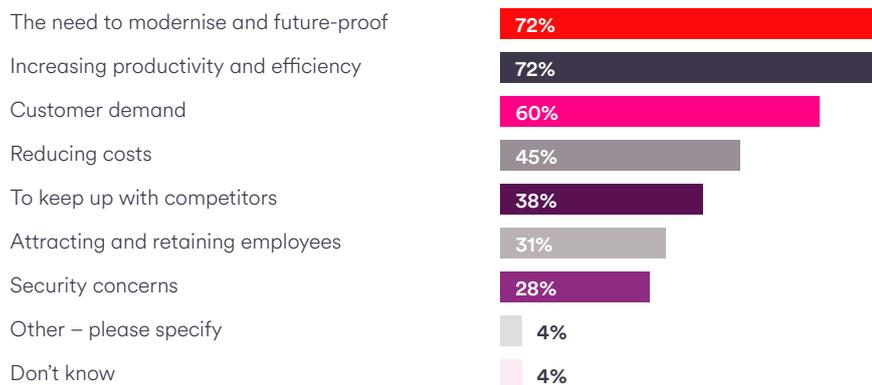
Perhaps predictably, high speed connectivity (92%), a secure and reliable connectivity (89%) and high-speed bandwidth connectivity (82%) all ranked as some of the top essential features for a modern business. Moreover, mobile and agile working capabilities also ranked highly (82%). Interestingly, roughly two-thirds also feel that the cloud (62%) and greater personalisation of service offering for customers (63%) are also critical.

FIGURE 5: Of the following list, what functions or features do you believe are essential to modern business? Please tick all that apply.

High-speed connectivity	92%
Secure, reliable connectivity	89%
High bandwidth connectivity	82%
Mobile and agile working capabilities	82%
Greater personalisation of service/offering for customers	63%
Cloud	62%
Software-as-a-Service (SaaS)	42%
Omni-channel service delivery	39%
Virtualisation	29%
Don't know	3%
Other – please specify	2%
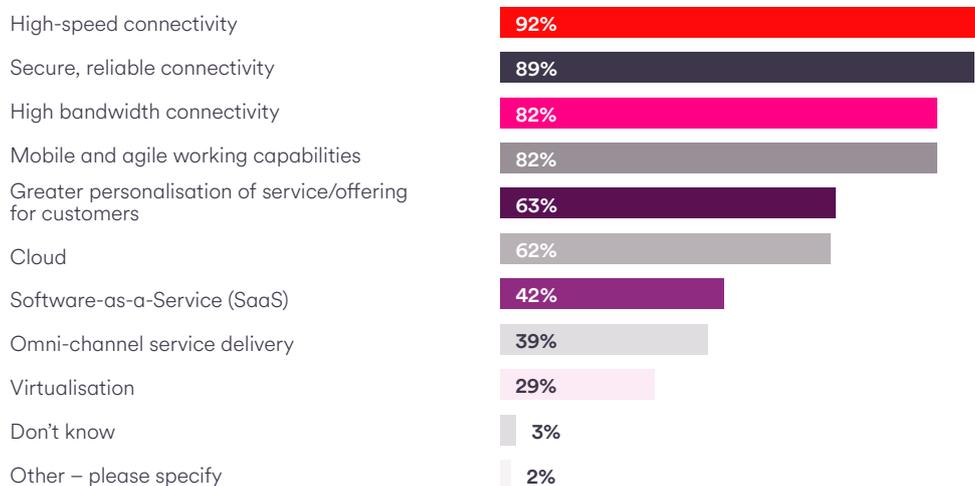
Over a third (35%) told us that their greatest strength is their ability to engage and transact with customers across multiple channels. Just over a fifth (21%) cite offering personalisation to customers as their greatest strength. By contrast, legacy technology is reported as the most common weakness across businesses, with 39% of participants stating that legacy infrastructure is unsuitable for implementing and achieving their transformation strategies. Following this, at some distance, is a lack of technical resource to support business change (17%).

FIGURE 6: Thinking about the business processes in your organisation, what do you believe is your single greatest strength?

The ability to engage and transact with customers across multiple channels	35%
Offering personalisation to customers	21%
Offering employees a flexible, agile workplace	14%
Seamless integration which improves productivity	12%
Other – please specify	9%
Don't know	9%
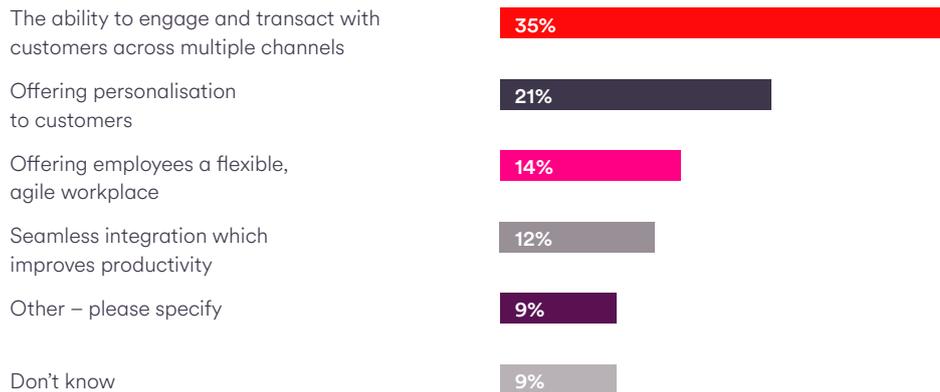
FIGURE 7: By contrast, what do you believe is your business's greatest weakness at present?

Legacy infrastructure unsuitable for transformation strategies	39%
Lack of technical resource to support business change	17%
Analysing data insights and trends	13%
Employee recruitment and retention difficulties	7%
Don't know	7%
Other – please specify	6%
Provision of omni-channel customer service	4%
Lack of personalisation for customers	4%
Cybersecurity concerns	4%
Lack of preparation for GDPR	1%
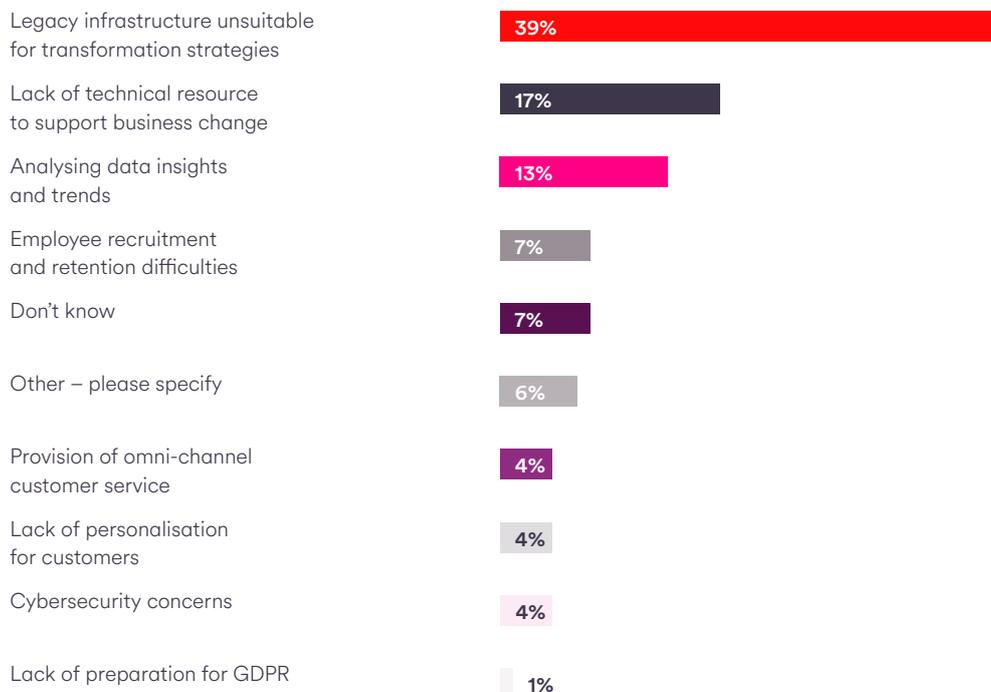
3

Businesses are seeing a number of different areas holding them back from achieving their overall business goals and strategies.

Almost three-quarters (70%) feel legacy technology can inhibit integration across their business, resulting in a drain on staff resources and time; a further 57% believe a lack of staff training means technology is not being used to its full potential. In addition, 41% told us that their solutions are not user-friendly, and can be cumbersome and difficult to use. Just 17% told us that technology is not holding their organisation back.

FIGURE 8: Do you believe that technology in your business is holding you back from achieving your desired strategies and, if so, how? Please tick all that apply.

Legacy technology can inhibit integration across the business, resulting in a drain on staff resources and time	**70%**
A lack of staff training regarding best-practice use of our technology platforms means they are not being used to their full potential	**57%**
Our solutions are not user-friendly, meaning they can be cumbersome and difficult to use	**41%**
A lack of mobility and connectivity means staff are only able to access internal systems within the office	**25%**
Our technology doesn't hold us back from achieving our strategies	**17%**

It is interesting to note that many businesses still focus on more traditional forms of technology solutions, with over half of our participants stating that network infrastructure and connectivity (53%) and mobile working technology (56%) have a high potential to offer their business improvement in the future. The cloud also ranked highly (48%). In comparison, just 6% state that Software-Defined Networking (SDN) has a high potential for improvement, suggesting many are playing catch-up with technological advances.

FIGURE 9: Thinking about your current digital infrastructure, to what extent do you believe the following have the potential to offer your business improvement?


Legend: ■ High impact ■ Mid-level impact ■ Low impact ■ No impact ■ Don't know

Network infrastructure and connectivity: 53% | 33% | 9% | 1% | 4%

Mobile working technology: 56% | 34% | 6% | 1% | 3%

WiFi: 33% | 33% | 24% | 7% | 3%

Cloud: 48% | 37% | 12% | 0% | 3%

Unified Communications: 33% | 40% | 18% | 3% | 6%

Artificial Intelligence (AI): 34% | 29% | 18% | 9% | 10%

VR/AR (Virtual or Augmented Reality): 14% | 29% | 29% | 14% | 14%

SDN (Software-Defined Network): 6% | 25% | 22% | 8% | 39%
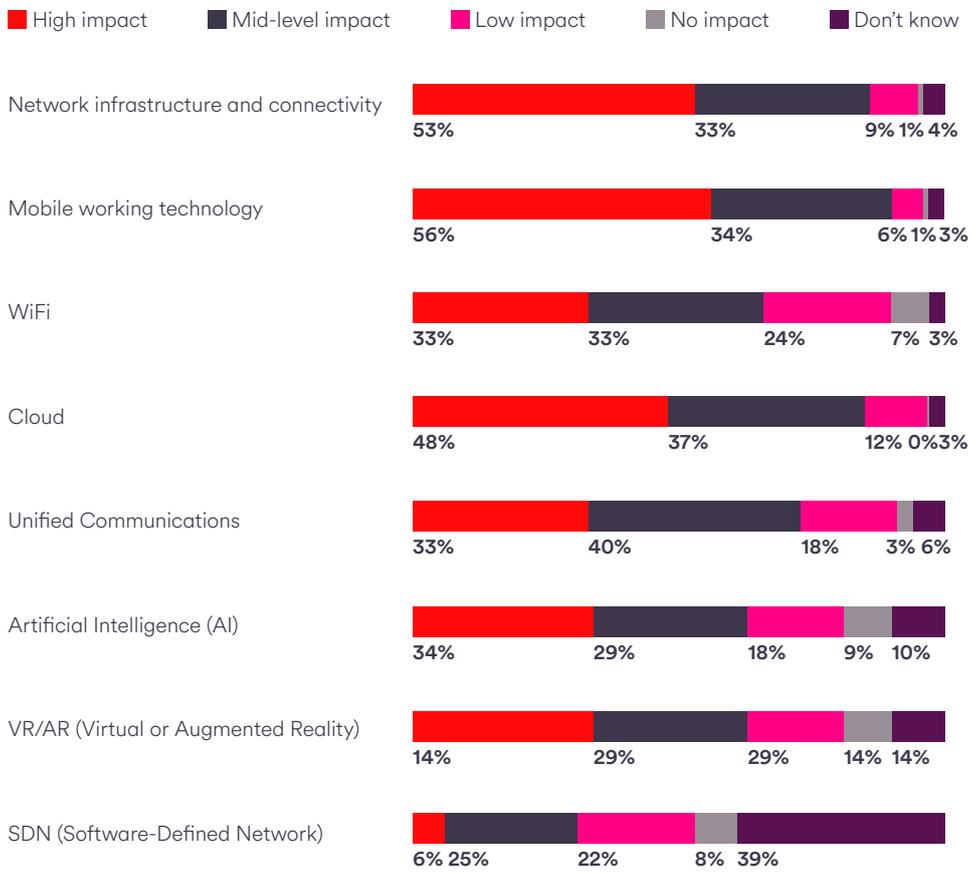
4

While it is encouraging to see that 68% of businesses surveyed have a formal strategy for embracing and/or improving digital solutions and infrastructure, this means that almost a third do not have a strategy in place.

The evolution of digital technology in recent years means it is vital that businesses are able to fully embrace digital in order to remain competitive. With this in mind, it is encouraging to see that 19% want to put a strategy in place for the future.

FIGURE 10: Does your business have a formal strategy for embracing and/or improving digital solutions and infrastructure?

9% Don't know

4% No plans to implement

**19%** No, but we are looking to implement one

68% Yes
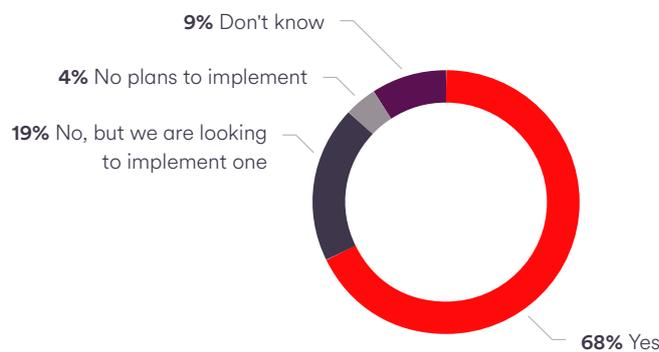
When we look at businesses' short-term goals, two-thirds (67%) are prioritising increasing employee engagement and retention and creating operational efficiencies. Meantime, when it comes to long-term goals, unsurprisingly 74% said there is a focus on increasing year-on-year revenues and profit. However, over half (59%) also want to develop a digital-focused culture that enhances innovation, and more than a quarter (26%) are considering mergers and acquisitions over the next five to 10 years.

FIGURE 11: Similarly, what do you believe are your business's long-term (five-to-10-year) goals? Please tick all that apply.

Year-on-year increasing in revenue/profit	**74%**
Growth of customer base	**62%**
Develop a digital-focused culture that enhances innovation	**59%**
Become more competitive in the marketplace	**57%**
Build a stronger, more skilled workforce	**49%**
Year-on-year reduction in expenses	**27%**
Mergers and acquisitions	**26%**
Don't know	**3%**
Other – please specify	**2%**
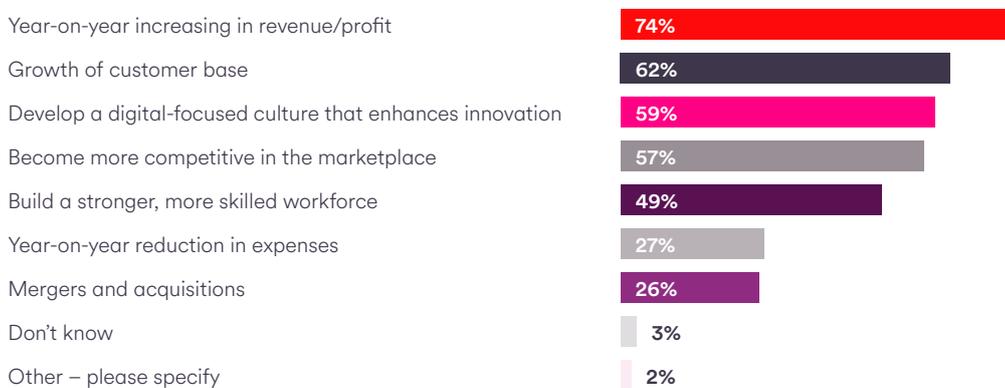
However, participants also report a number of barriers to achieving these goals. 56% cite having insufficient staff/resource to be able to implement new changes, and a further 56% told us that the cost of updating legacy technology is an issue. Moreover, half of participants (50%) state that there is a cultural resistance to change in their business.

FIGURE 12: Do you feel there are any barriers or challenges that stand in the way of achieving these goals? Please tick all that apply.

| Barrier	Percentage
Insufficient staff resource required to implement new changes	56%
Costs involved in updating legacy technology	55%
Cultural resistance to change	50%
Lack of knowledge or skills required to meet goals	47%
Potential disruption caused to services	33%
Organisation currently has more important priorities	32%
Training requirements for staff	21%
Difficulty finding the right technology partner	11%
Don't know	5%
Other – please specify	1%
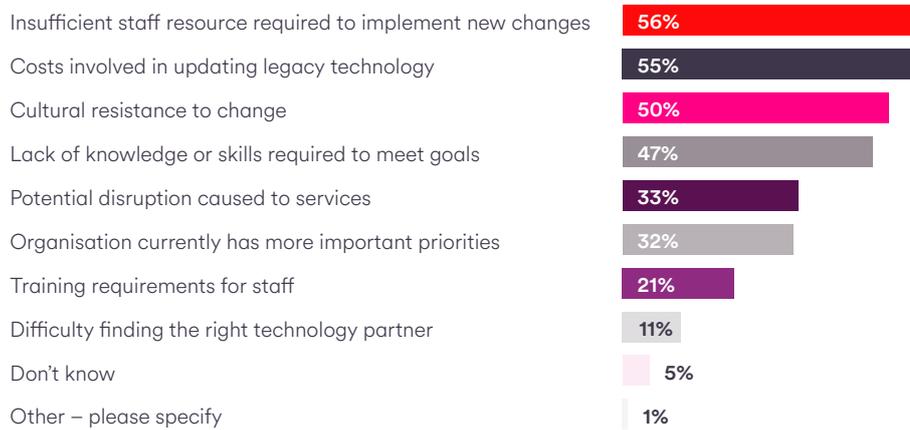
5

Finally, by far the most important factor for survey participants when choosing a supplier or partner is market expertise (72%).

This was followed by value for money (66%) and reliability (64%). Interestingly, almost half (48%) are also looking for professional and advisory services to supplement their own in-house skills and expertise.

FIGURE 13: Which of the following areas are most important to your business when choosing a supplier or partner? Please tick all that apply.

Market expertise	72%
Value for money	66%
Reliability	64%
Professional and advisory services	48%
Reputation	39%
Good customer care	39%
Staff training and support	30%
Don't know	5%
Other – please specify	4%
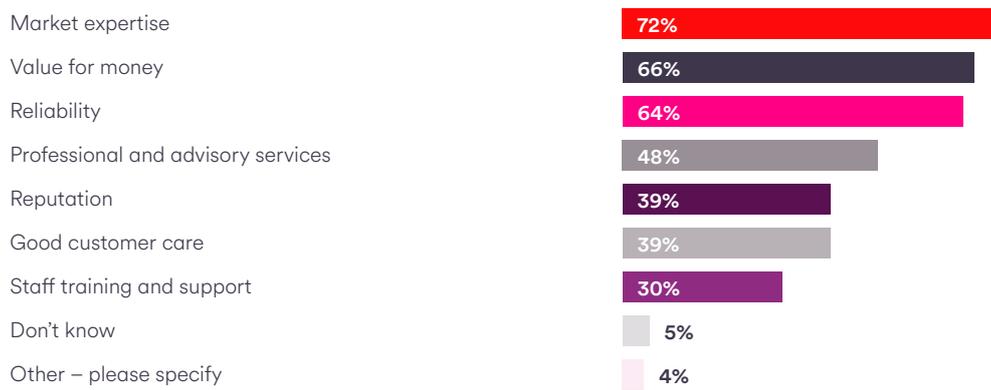
Conclusion

Understanding the digital standpoint of today's business leaders

Today's business leaders are clearly aware of the urgent need to embrace digital. After all, most survey participants (73%) label themselves as "Digital Desirers"; they've started to adopt a digital agenda but know they need to do more.

While they're keen to modernise and future-proof their organisations, the vast majority feel that legacy technology and infrastructure is holding them back. Only 19% of respondents would refer to themselves as "Digital Leaders", which shows that there's still work to do.

What's really interesting is that traditional "foundation" technology is still critical to the continued growth and success of most organisations. Just over half stated that network infrastructure and mobile working have the highest potential when it comes to delivering improvement in the future. And when it comes to connectivity, a massive 92% felt that high speed was essential, closely followed by security, reliability and high bandwidth.

We might have expected Software Defined Networking (SDN) to rank high on the impact list, but this wasn't the case, with only 6% saying it was important. Maybe this means that organisations are still concerned with getting the basics right. Or it could be that they're not quite sure what benefits SDN will bring. This is something that we at Virgin Media Business are keen to address, by helping our customers understand SDN and bringing it to life.

Tradition versus transformation

The message that legacy technology is a massive problem for businesses came through loud and clear.

It emerged as the most common weakness, with 39% of participants saying that their legacy infrastructure will prevent them implementing and achieving their transformational strategies. The amount of investment needed is also an issue, with 56% telling us that the cost of updating their legacy technology is a big concern.

Almost three-quarters of respondents feel that it's holding up integration and is a drain on staff, resources and time. This is closely linked to another very common issue: not having enough people (or the right people) to support change. 56% said they had insufficient staff or resources to be able to implement new developments. With that in mind, it's not surprising that almost half of the organisations we spoke to are looking for professional and advisory services to supplement their own in-house skills and expertise, for help unravelling the tangle of legacy infrastructure.

Informed through partnership

Despite a perceived focus in recent years on the importance of social media, just 22% of participants use these channels to keep updated on the latest market trends, technology developments and best practice. The vast majority (78%) rely on partners and suppliers. At Virgin Media Business we take this particular responsibility seriously and try to provide thought leadership, guidance and insight wherever we can. Perhaps it's no surprise that market expertise was by far the most important factor (72%) when it came to choosing a supplier or partner.

Looking towards tomorrow

As we enter an era of immense change, businesses have plenty of external issues to think about.

The biggest factors were legislation such as GDPR (54%) and uncertainty due to Brexit (53%). Sustainability and the green agenda are also becoming increasingly important to a large number of organisations (27%). And there's still some concern about millennials and Generation Z entering the workforce (25%).

So it's no wonder that the most common drivers for pursuing digitisation are to modernise and future-proof, while increasing productivity and efficiency (both 72%). With everything around us moving at an alarming rate, businesses must advance if they're to stay ahead – or even just keep up!

Customer demand is also a significant area of focus (at 60%) but how can businesses achieve this, when it's clear that they're pushed for resource and constrained by the technology they currently have?

Partnering is proving to be a good option, as is laying down the foundations for more modern technology to replace legacy systems. The majority are starting with connectivity that has to be predictable and fast (92%), secure and reliable (89%), with high-bandwidth (82%).

So how can Virgin Media Business help you?

Virgin Media Business can help you combat many of the challenges and issues highlighted by this research. We're always thinking about ways to keep our customers one step ahead and "outsmart tomorrow". Right now, we're working alongside businesses just like yours, seeing them transform, drive collaboration and become true digital leaders. But in this complex world we have to keep things simple and straightforward, which is why we've honed our portfolio into just three SMART Solutions: Connectivity, Workspace and Advisory.

SMART Connectivity is our suite of ultrafast, ubiquitous and scalable connections, empowering your business to take the steps it needs to transform. They're always on, and they're able to grow with your business – wherever and whenever you need them to.

SMART Workspace gives you real-time, secure access to information on the go, on any device. Your teams have everything they need to collaborate, work flexibly, and make informed decisions.

Finally, *SMART Advisory* helps you become a true digital leader by taking advantage of our expertise. Consultative, advisory and professional services designed to support you today, tomorrow and into the future.

In summary

Our survey has shown that there's never been a more critical time to build a digital business, and that companies are actively seeking trusted partners who can help them do just that. After all, with a barrier of legacy technology draining resource – and a barrage of new external challenges to contend with – it makes no sense to go it alone.

SMART Solutions from Virgin Media Business can help every business become truly digital. We provide support and best-practice guidance, and offer cutting-edge connectivity and workplace solutions, so organisations can transcend their legacy technology and become stronger digital businesses.

We'd love to talk to you about how we can help you outsmart tomorrow and share some real-life examples of where we're already helping other UK businesses to digitally transform. So please do drop us an email at enterprise@virginmedia.co.uk if you'd like a conversation.

Ian Hoddle, Director, Large Enterprise Sales

virginmediabusiness.co.uk/enterprise-business

Appendix one: Survey questions

QUESTION: Which of the following best describes your business's approach to digitisation?

Answer	Percentage
Digital Leader - we see digital as the foundation of our business	19%
Digital Desirer - we have begun to adopt a digital agenda, but we know we need to do more	73%
Digital Denier - we still use traditional IT infrastructure and key barriers stand in our way to changing this	8%

GRID QUESTION: Thinking about your current digital infrastructure, to what extent do you believe the following have the potential to offer your business improvement?

Network infrastructure and connectivity

Answer	Percentage
High impact	53%
Mid-level impact	33%
Low impact	9%
No impact	1%
Don't know	4%

Mobile working technology

Answer	Percentage
High impact	56%
Mid-level impact	34%
Low impact	6%
No impact	1%
Don't know	3%

WiFi

Answer	Percentage
High impact	33%
Mid-level impact	33%
Low impact	24%
No impact	7%
Don't know	3%

Cloud

Answer	Percentage
High impact	48%
Mid-level impact	37%
Low impact	12%
No impact	0%
Don't know	3%

Unified communications

Answer	Percentage
High impact	33%
Mid-level impact	40%
Low impact	18%
No impact	3%
Don't know	6%

AI (Artificial Intelligence)

Answer	Percentage
High impact	34%
Mid-level impact	29%
Low impact	18%
No impact	9%
Don't know	10%

VR/AR (Virtual or Augmented Reality)

Answer	Percentage
High impact	14%
Mid-level impact	29%
Low impact	29%
No impact	14%
Don't know	14%

SDN (Software Defined Network)

Answer	Percentage
High impact	6%
Mid-level impact	25%
Low impact	22%
No impact	8%
Don't know	39%

QUESTION: Of the following list, what functions or features do you believe are essential to modern business? Please tick all that apply.

Answer	Percentage
High speed connectivity	92%
High bandwidth connectivity	82%
Secure, reliable connectivity	89%
Omni-channel service delivery	39%
Mobile and agile working capabilities	82%
Virtualisation	29%
Cloud	62%
Greater personalisation of service/offering for customers	63%
Software-as-a-Service (SaaS)	42%
Other – please specify	2%
Don't know	3%

QUESTION: Do you believe that technology in your business is holding you back from achieving your desired strategies and, if so, how? Please tick all that apply.

Answer	Percentage
Legacy technology can inhibit integration across the business, resulting in a drain on staff resources and time	70%
A lack of staff training regarding best-practice use of our technology platforms means they are not being used to their full potential	57%
Our solutions are not user-friendly, meaning they can be cumbersome and difficult to use	41%
A lack of mobility and connectivity means staff are only able to access internal systems within the office	25%
Our technology doesn't hold us back from achieving our strategies	17%
Other – please specify	6%
Don't know	5%

QUESTION: Thinking about the business processes in your organisation, what do you believe is your single greatest strength?

Answer	Percentage
The ability to engage and transact with customers across multiple channels	35%
Offering personalisation to customers	41%
Seamless integration which improves productivity	12%
Offering employees a flexible, agile workplace	14%
Other – please specify	9%
Don't know	9%

QUESTION: In contrast, what do you believe is your business's greatest weakness at present?

Answer	Percentage
Legacy infrastructure unsuitable for transformation strategies	39%
Cyber security concerns	2%
Lack of preparation for GDPR	1%
Analysing data insights and trends	13%
Provision of omni-channel customer service	4%
Lack of personalisation for customers	4%
Lack of technical resource to support business change	17%
Employee recruitment and retention difficulties	7%
Other – please specify	6%
Don't know	7%

QUESTION: Does your business have a formal strategy for embracing and/or improving digital solutions and infrastructure?

Answer	Percentage
Yes	68%
No, but we are looking to implement one	19%
No plans to implement	4%
Don't know	9%

QUESTION: Approximately, how far through this strategy is your business?

Answer	Percentage
Up to 25%	28%
26 to 50%	30%
51 to 75%	25%
More than 75%	10%
We have completed our strategy	1%
Don't know	6%

QUESTION: Looking ahead, what would you cite as your short-term (one to two years) goals? Please tick all that apply.

Answer	Percentage
Reducing costs	57%
Implementing or increasing flexible working practices	37%
Increasing digital service delivery	60%
Attracting new talent and skills to the business	47%
Improving productivity	67%
Increasing employee engagement and retention	42%
Creating operational efficiencies	67%
Provision of modern digital services across the business	44%
Improving customer satisfaction	54%
Improving levels of personalisation available to customers	35%
Updating/upgrading legacy technology	55%
Other – please specify	2%
Don't know	3%

QUESTION: Similarly, what do you believe are your business' long-term (five to 10 years) goals? Please tick all that apply.

Answer	Percentage
Become more competitive in the marketplace	57%
Build a stronger, more skilled workforce	49%
Year-on-year increase in revenue/profit	74%
Year-on-year reduction in expenses	27%
Growth of the customer base	62%
Develop a digital-focused culture that enhances innovation	59%
Mergers and acquisitions	26%
Other – please specify	2%
Don't know	3%

QUESTION: Do you feel there are any barriers or challenges that stand in the way of achieving these goals? Please tick all that apply.

Answer	Percentage
Costs involved in updating legacy technology	55%
Potential disruption caused to services	33%
Lack of knowledge or skills required to meet goals	47%
Insufficient staff resource required to implement new changes	56%
Training requirements for staff	21%
Cultural resistance to change	50%
Organisation currently has more important priorities	32%
Difficulty finding the right technology partner	11%
Other – please specify	1%
Don't know	5%

QUESTION: What do you believe are the main drivers for pursuing digitisation across the business? Please tick all that apply.

Answer	Percentage
The need to modernise and future-proof	72%
Security concerns	28%
To keep up with competitors	38%
Customer demand	60%
Attracting and retaining employees	31%
Increasing productivity and efficiency	72%
Reducing costs	45%
Other – please specify	4%
Don't know	4%

QUESTION: Which of the following areas are most important to your business when choosing a supplier or partner? Please tick all that apply.

Answer	Percentage
Professional and advisory services	48%
Staff training and support	30%
Reputation	39%
Market expertise	72%
Reliability	64%
Value for money	66%
Good customer care	39%
Other – please specify	4%
Don't know	5%

QUESTION: How does your business stay up-to-date with the latest trends and insights in your industry, best-practice guidance and new technology? Please tick all that apply.

Answer	Percentage
Government funded articles	21%
Internal research projects	48%
Consulting industry experts/publications	69%
Industry events and conferences	75%
Independent news pieces	39%
Insight and guidance from partners and suppliers	78%
Social media	22%
Other – please specify	1%
Don't know	6%

QUESTION: Which of the following external factors do you believe will have the greatest impact on your business over the next twelve months? Please tick all that apply.

Answer	Percentage
Government and political legislation, such as the General Data Protection Regulation (GDPR)	54%
Economic uncertainty due to Brexit	53%
UK political landscape	43%
Global political landscape	30%
The potential for new trade deals	16%
Millennials/Generation Z entering the workforce	25%
Sustainability and green agenda	27%
Reducing carbon footprint	17%
Other – please specify	5%
Don't know	6%

Appendix two: Participating organisations

Adecco	IG
Airbus	Imperial Tobacco
Aldermore Bank	Integral
Amazon	Interserve
AXA	Intu Properties
Balfour Beatty	Ishida Europe
BAM Nuttall	Islamic Bank of Britain
Bank of Ireland	Jurys Inns
Barhale	Kier
Bechtel	Konecranes
Bergstrom	L.E.K. Consulting
C Butt	Lagan Cement
Cash Converters	Legal & General Investment Management
Cath Kidston	Lemac
Charles Tyrwhitt	Lend Lease Construction
Chiltern Cold Storage Group	Marsden Building Society
Close Brothers	Marshalls
Coats	Molson Coors Brewing
Compass	MSX
Costain	Murphy
Dyson	MWH Treatment
Ebiquity	N Brown
Ecology Building Society	Norgren
Edinburgh Airport	Nuttall
Eurovia	Porvair
Fat Face	Prater
FES Ltd	Redde
Freeths	Renishaw
Galliford Try	Rico
Go-Ahead Group	Ricoh
GPS PE Pipe Systems	Royal Mail
Hargreaves Lansdown	RPMI
Hastings Insurance Services	Saffron Building Society
Hilton Hotels	Search Consultancy
Holland & Barrett	Serco
Hutchison Ports	Shawbrook Bank

Shop Direct Home Shopping

Skanska

Smith & Williamson

Southern Railway

SSVC

Stroma Group

Taylor Wimpey

The Channel Tunnel Group

The Edrington Group

The Natural Power Consultants

Thomas Johnstone

Thorntons Law

Training 2000

Transport Scotland

Turkish Bank

Turner & Townsend

Ulster Carpets

VGC Group

VP

Wage Day Advance

Walker Filtration

Weightmans

Wienerberger

Yorkshire Building Society

BUSINESS