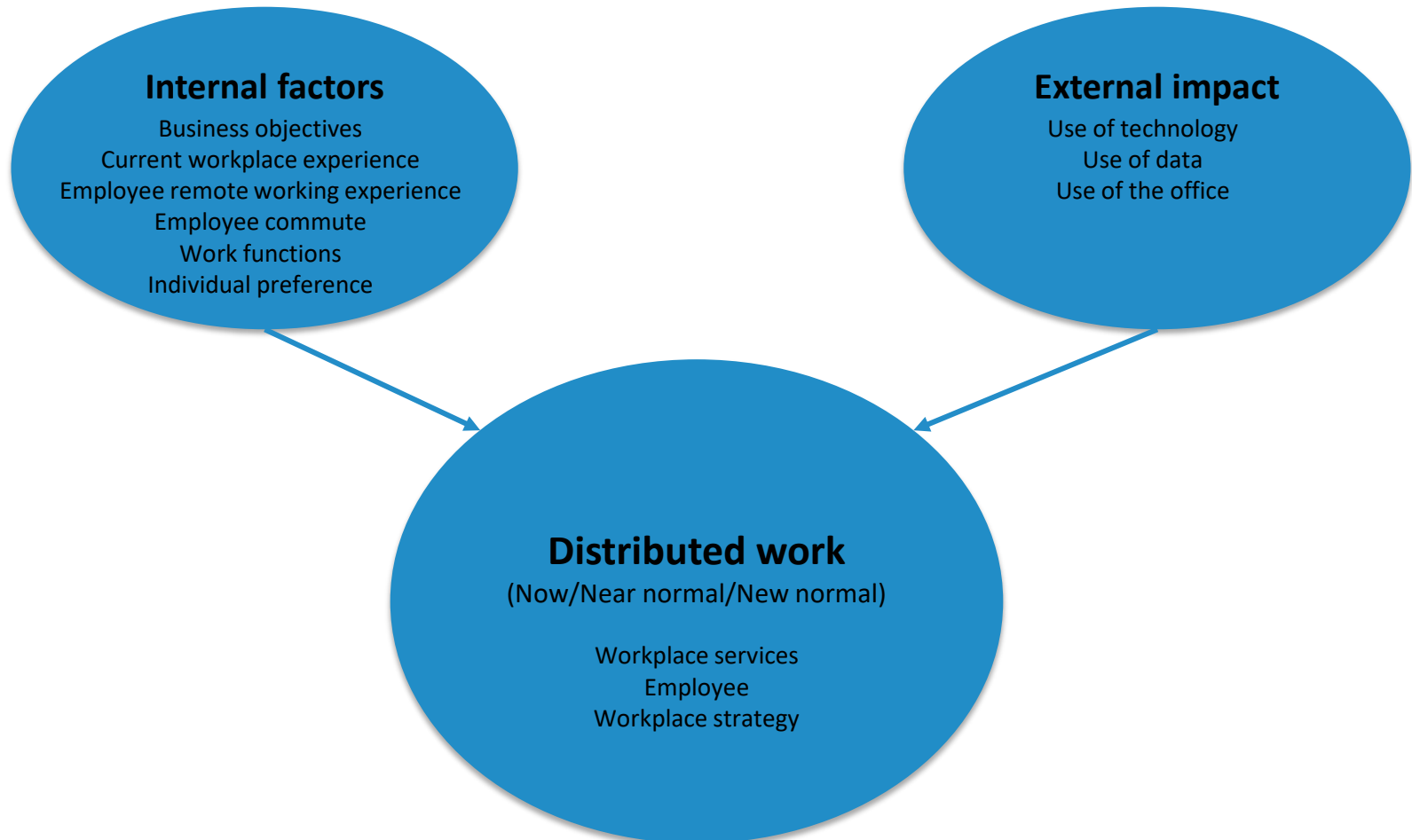




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	Now (From Covid until Office Return)	NEAR NORMAL (Office Return 6 months)	NEW NORMAL (Post 6-18 months after return)
Political	<ul style="list-style-type: none"> Lockdown Rules – New way of working and Living: Lockdown / Policing / Quarantine Regulation: PPE Wearing 	<ul style="list-style-type: none"> PPE Required In offices and public places Temperature taking Forced political decision, rather than the RIGHT thing to do 	<ul style="list-style-type: none"> New Laws address cleaning Medical Profession revamp Workplace HSE now applied at home
Economic	<ul style="list-style-type: none"> Fear of job loss/earning Risk Cost Value Efficiency – GRE Real Estate Portfolios questioned Employees Furloughed: Reduced Salary/No Work Employees: Reduced Salary – Less Motivation Travel Bans – Savings on Company Travel (Airlines affected) Perceived productivity is higher in some sectors Construction continues with skeleton staff (country specific) 	<ul style="list-style-type: none"> Job Security improvement Return to work and wages improve Travel Ban continues/Limited Benefits packages change to include work experience solutions/Technology improvements for home Global recession continues except for FMCG, Life sciences, Tech and logistics Construction will continue – developers may need financial restructuring 	<ul style="list-style-type: none"> New jobs for some Y-o-y Salary increases discussed Bonus discussions continue Some professions look into Leaner teams Serviced offices/Flex up down leases/Terms on leases – challenged Some professions/job types will cease to exist. Wages stagnate --> cost of living reduces Construction spacial distancing implementation
Social	<ul style="list-style-type: none"> Home Schooling/Children at home Challenges: requirement for flexible working hours Isolation – effects to wellness Ground Hog Day – Monotony Family/Friends – Virtual Socialising only Employees: Working from Home – Overworked / Tired / Productivity 	<ul style="list-style-type: none"> Office utilisation only 20-50% Children remain at home through summer / Return to school September? Social distancing remains but more lax General wellness improvements until winter in Northern Hemisphere 	<ul style="list-style-type: none"> Office becomes a space for social collaboration Utilisation in office remains lower than pre-covid People priorities self over work, part time work, more time with family/leisure --> 4 day week prevails. Graduate impact: new way of socialising WFH is socially acceptable WFH policies incl. funding for employee’s home office
Technological	<ul style="list-style-type: none"> Mobile Workforce: Increase in Laptop(s) + Mobile Devices Connectivity/Bandwidth - Restrictions. Provision of data cards (depending on bandwidth/location) VOIP Increase Video conference increase 	<ul style="list-style-type: none"> Video conferencing remains PCs become replaced – workforce DRP (disaster recovery plans) Drive to train and teach virtual collaboration Non-video call collaboration gains traction Smart buildings: implementing smart sensors, contactless building entry 	<ul style="list-style-type: none"> Video conference remains norm Travel peaks and than drops off to a lower than pre covid average Agile hub offices increase Automation becomes the new norm (robotics) Policy for teleworkers incl. Reimbursement of home internet
Environmental	<ul style="list-style-type: none"> Social Environment: Workplace Experience – do people have Study Less Commuting / Travel– Less Pollution Increased Air Quality 	<ul style="list-style-type: none"> Workplace will have spctial distancing Pollution improves/Air quality – Less commuting but use of car will increase in some areas Canteens – Limited services Cleaning – Visible in workplace and more frequent 	<ul style="list-style-type: none"> Travel peaks and than drops off to a lower than pre covid average Pollution improves/Air quality – Less commuting
Legal	<ul style="list-style-type: none"> Labour law – Employee contracts are followed (country specific) Regulatory 	<ul style="list-style-type: none"> Labour law – % Employee contracts are amended to more home working to use office as touchdown 	<ul style="list-style-type: none"> RE Case Law change – Force Majeure clauses redefined – Long Stop Dates questioned Move to more flexible contracts in GRE

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Impacts description



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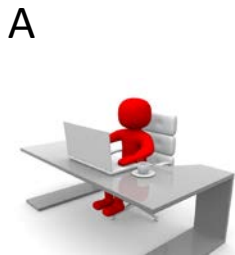
Impacts	Now	NEAR NORMAL	NEW NORMAL
Workplace services (IFM)	N/A	<ul style="list-style-type: none"> Covid 19 additional Resources continue to impact WS Change control on existing FM contracts --> increased costs CAPEX investment to adapt offices for return to work Teams operating in two environments --> home and office. Employee's home set up deployment Wellness: Investing in additional cycle/running facilities (locks and showers) Rapid deployment of smart workplace tech i.e occupancy sensors Assertive workplace comms and mandatory policies. Active management and enforcement. Strategic encouragement to return workforce to the office – Branding/Fun/Benefits Catering Facilities onsite remain closed/limited 	<ul style="list-style-type: none"> Operating costs begin to stabilise Collaboration space gets larger, but for less people (less dense) Office utilisation lower than pre Covid Office becomes “drop in” centre and monthly onsite meetings increase creating peak days in utilisation Typical Monday Meetings collaboration shift to throughout week On site amenity space becomes more popular as social space --> demand more variety and innovation WS becomes data hungry to start DRP/Strategy Planning: Collection and analysis of realtime workplace performance data is mandatory --> birth of the Workplace Performance Manager
Employee impact	N/A	<ul style="list-style-type: none"> Active commuting prevails --> walking, cycling and running Driving will increase to maintain social distancing outside major metropolitan cities i.e. London, Paris, Berlin etc. Digital collaboration and working continues Work Force Reduction (WFR) kicks in 	<ul style="list-style-type: none"> Active commuting prevails --> walking, cycling and running Driving will increase to maintain social distancing outside major metropolitan cities i.e. London, Paris, Berlin etc. Use of apps to determine non-peak times i.e. city mapper etc. Staggered commutes into workplaces Decentralisation: City Living is questioned for Suburbia. House renters move into larger homes, with a study space, outside expensive location
Workplace strategy	N/A	<ul style="list-style-type: none"> Portfolios under close review – LTP vamped up Immediate reaction unlikely due to “traditional Lease constraints”/Terms Those with existing options in flex providers, will utilise memberships in suburban areas (closer to where people live, outside city centres) – Hub offices may increase (?) Flex Leasing is highly considered in LTP Smart Building Investment becomes a key topic Technology is the new hot topic in buildings – OpEx increases to convert to smart buildings 	<ul style="list-style-type: none"> Workplace strategy (layout, worksettings) does a 180, more space, no/limited workstations. Location strategy changes from 'how do people get to the office' to 'how do people stay away from the centralised office' Companies preparing Disaster Recovery Plans Considerations for new leasing models: Flex up/down, less traditional leasing/hub offices/reduction in office space With workplace environment changing to collaboration the “future of office development” will come into question Technology and Smart Buildings becomes new Occupier criteria
Sector Specific Considerations		<ul style="list-style-type: none"> FMCG, Life sciences, Tech and logistics, public sector --> continue growth plans but with constraints on social distancing <ul style="list-style-type: none"> CRE teams in reactive mode Other sectors focus on changing business strategy to survive and grow in the new normal --> CRE teams not a priority until outcome is clear. IT departments future role as stand along function challenged 	<ul style="list-style-type: none"> The workplace is no longer seen as the differentiator between companies. CRE sphere of influence/responsibility is now Total. Home, work and everything in between. Investment in coaching teams to work effectively whilst working remotely or with a split population. New roles within organisations, that sit outside IT, CRE and HR. Scrum master approach.



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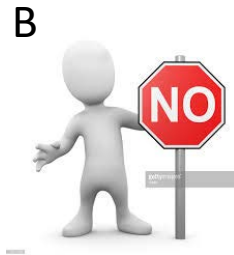
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Employee Impact – Employee Profiles



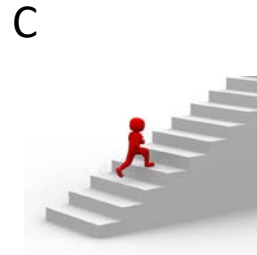
Those that don't have to

- Including those who:
- Have accepted a home working contract – Job profile
 - Are in middle adulthood life stage and invested in home office solution
 - Enjoy the new work/life balance



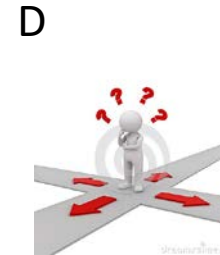
Those that don't want to

- Including those who:
- Are anxious about the near normal
 - Enjoyed homelife
 - Do not have a job profile for home work



Those that want to

- Including those who:
- Like being seen
 - Enjoy/Need Collaboration
 - Thrive around others
 - Enjoy time at the office over home
 - Are in young adulthood life stage without proper home office solution
 - Need the initial office stimulation post lockdown



Those that remain undecided

- Including those who:
- Are unsure what is "deemed" to be the right thing to accept for their career
 - Enjoyed Homelife
 - 50/50 Job Profilers



Those that have to

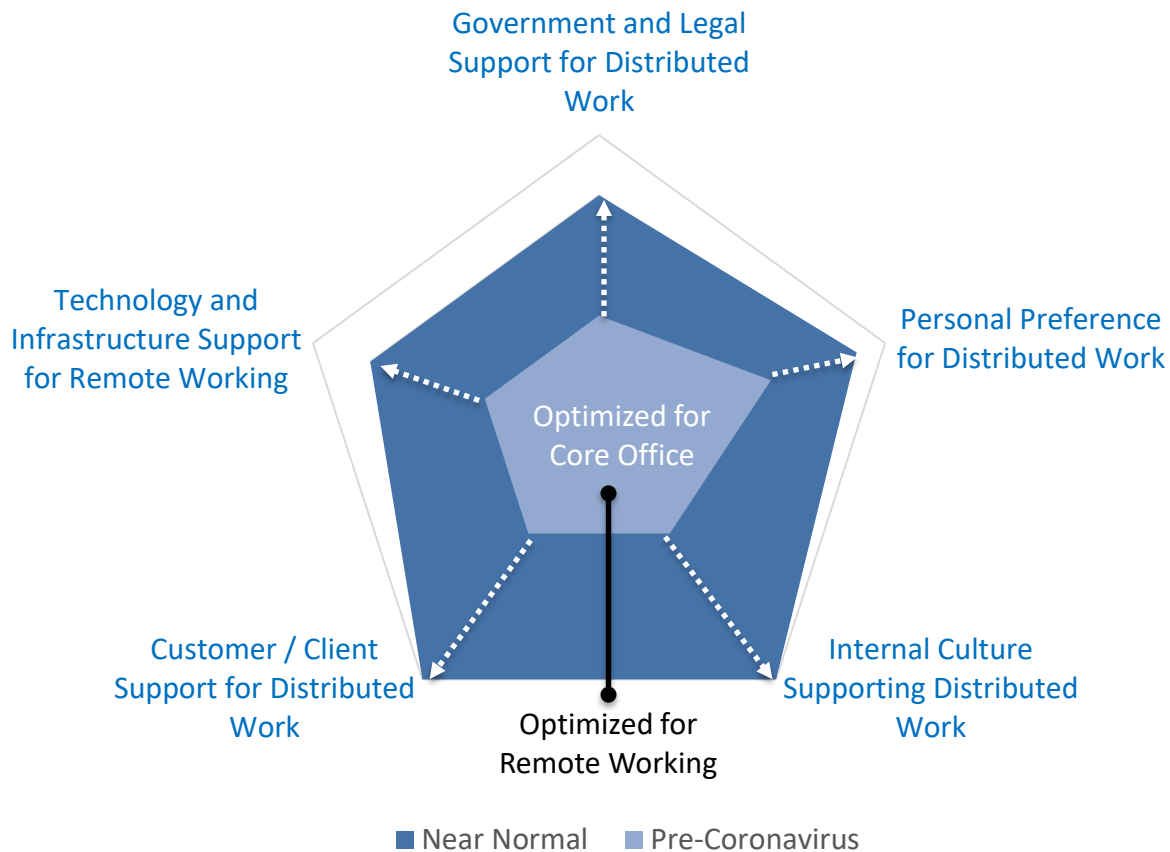
- Including those who:
- Have a job profile that service the office: Cleaners, Security, Facilities



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As we transition to 'Near Normal' we will see continued support for remote working



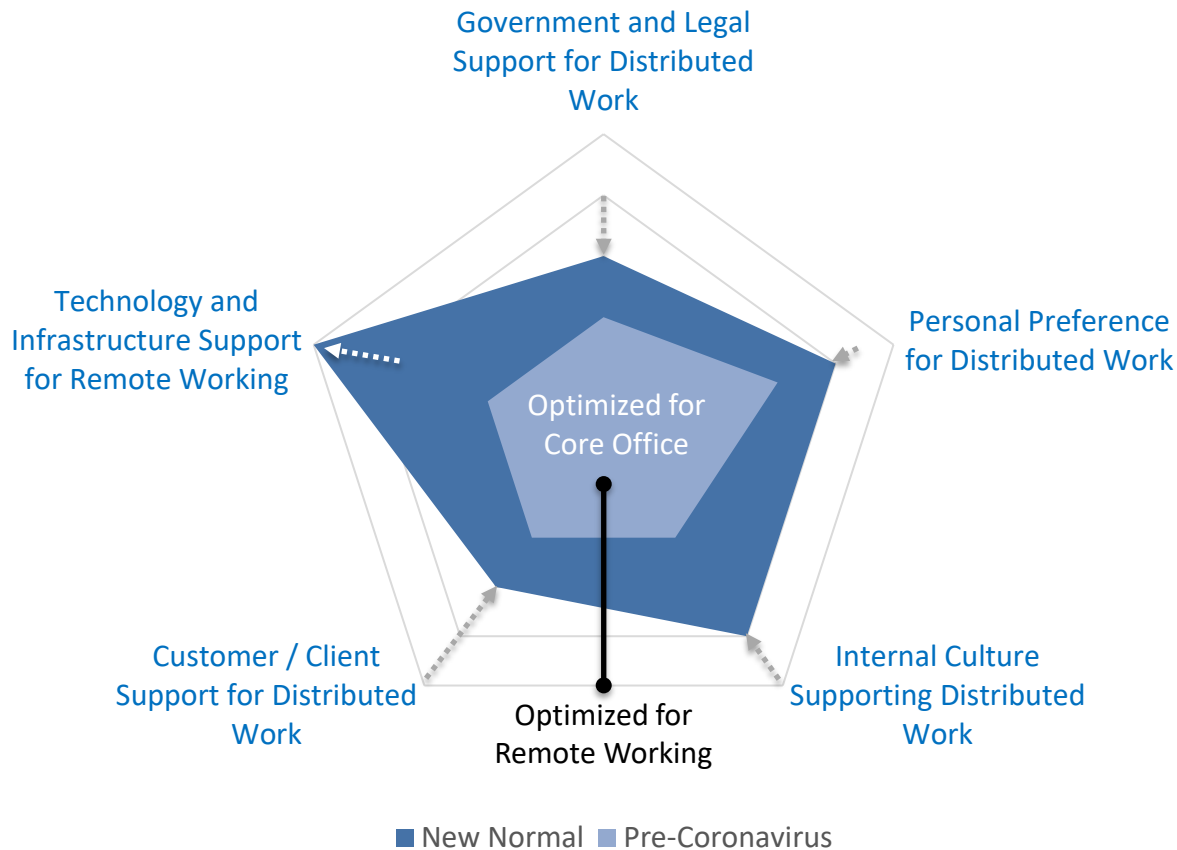
Arrows show transition from pre-coronavirus to 'near normal'



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As we transition to a 'New Normal' post-Coronavirus we are likely to see a more balanced distribution between core space and remote working



Arrows show transition from 'near normal' to 'new normal'

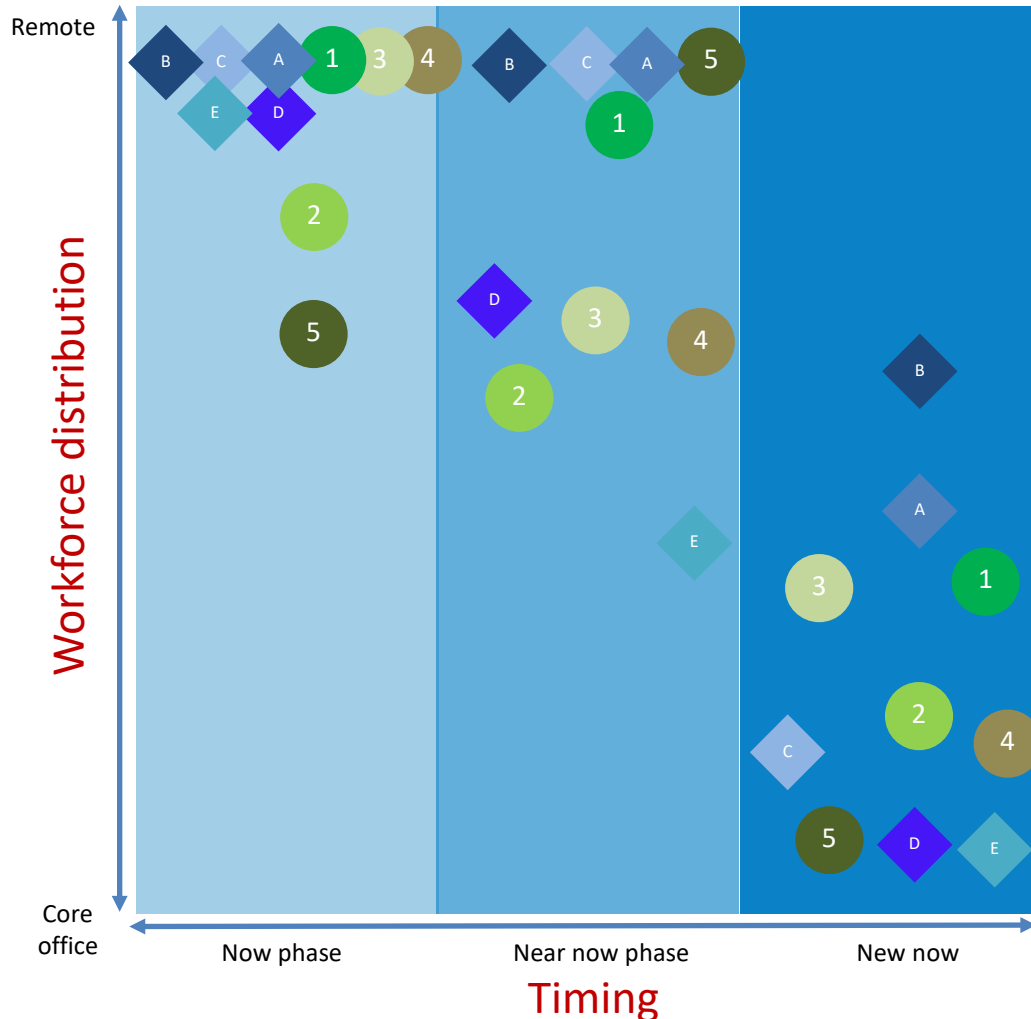


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Impact to employee vs. work functions



Employee profiles

- Those that don't have to return ◆ A
- Those that don't want to return ◆ B
- Those that want to return ◆ C
- Undecided ◆ D
- Those that have to return ◆ E

Work functions

- Business operations (incl. finance, HR, IT, CRE) ● 1
- Specialist (incl. risk, compliance, legal) ● 2
- Management & executives ● 3
- Sales and delivery ● 4
- Visitors ● 5

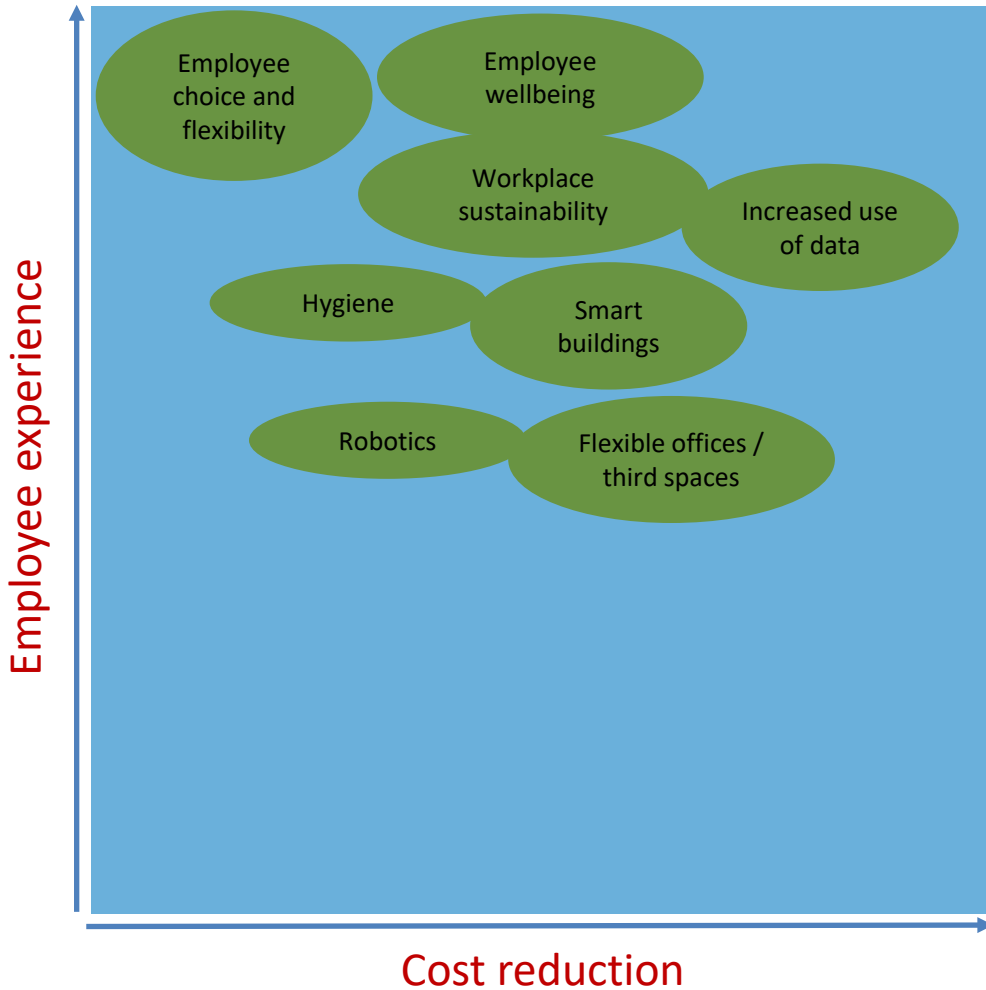


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Opportunities for CRE





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Big data will support workplace performance managers

Macro trends and forecasts

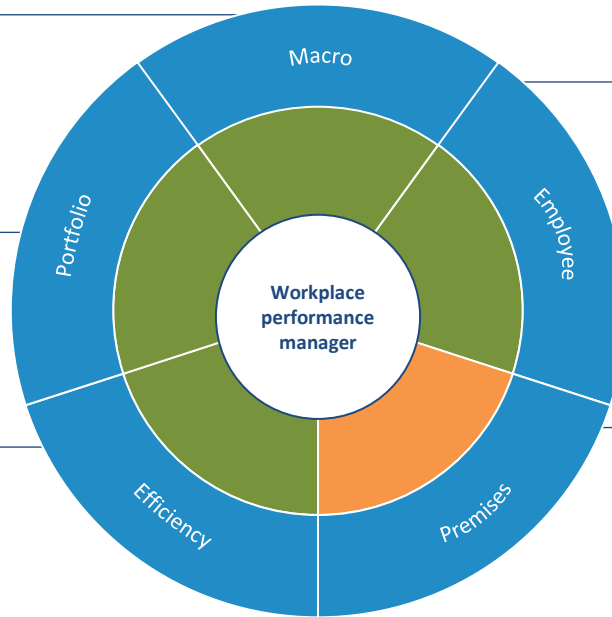
- Industry growth and contractions
- External environmental conditions
- Economic changes
- Technology developments

Portfolio

- Global workplace locations, assets and class
- Total occupancy costs
- NIA (m2)
- Critical lease dates – expiries, renewals, breaks
- CAPEX investments – past, present, future

Efficiency

- Room booking data – who, when and why
- Digital tools usage
 - Network analysis – who engages with who
 - Adoption and training completed
- IT helpdesk support tickets - profiled
- Financial performance of departments



Available now

Investment required

Employee

- Experience data
- Health and wellbeing data
- Commute modes
- Job functions
- Home location
- Sick days
- Education and training
- Satisfaction survey information (Pulse checks)
- Workplace social media analytics

Premises

- Real time site and work setting utilisation
- Catering purchases
- Indoor environmental performance – temp, CO2, PPM, VOC etc.
- Hard service performance indicators
- Digitised space and stack plans
- FF&E data
- Energy use
- Facilities service costs