

Workplace Evolution

Empowering employees in
a flexible work environment

Written by:

The
Economist

INTELLIGENCE
UNIT



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Boston Consulting Group, New York;
Photo credit: Anthony Collins

About this research

Workplace Evolution: Empowering employees in a flexible work environment is an Economist Intelligence Unit report, sponsored by Brockton Capital, a London-based real estate investment firm. This report examines the changing nature of work and the way companies are responding, in terms of office design, office wellness and corporate human resources (HR) policies, to ensure that they attract and retain the right talent.

The report is based on desk research and interviews with design experts, company executives and academics, conducted by The Economist Intelligence Unit between June and September 2017. We would like to thank the following individuals (listed alphabetically) for sharing their insight and experience:

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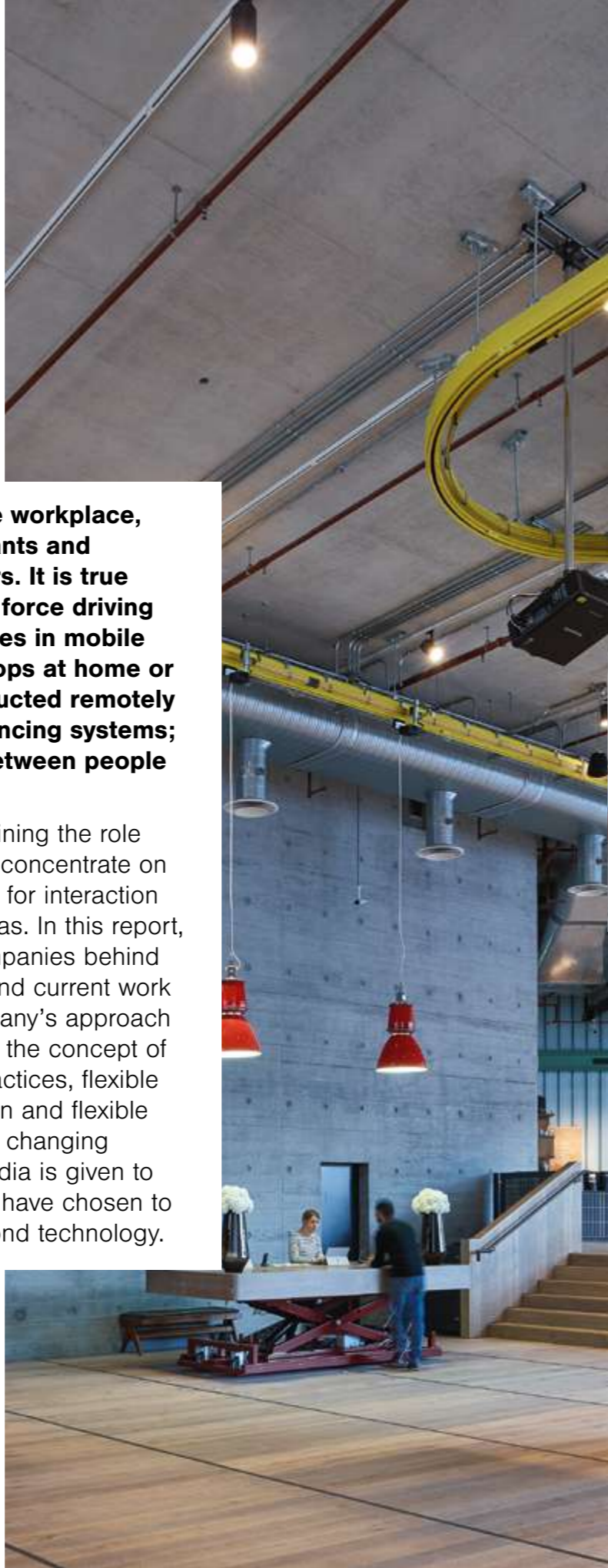
Michael Kapoor was the author of the report and Melanie Noronha was the editor.

Executive Summary

When thinking about the future of the workplace, many people envision robot assistants and virtual reality meetings in self-driving cars. It is true that technology has been the underlying force driving changes in the way people work. Advances in mobile technology allow people to work on laptops at home or from a local café; meetings can be conducted remotely over increasingly effective video-conferencing systems; huge quantities of data can be shared between people over great distances.

The changing nature of work is in turn redefining the role of the office. Previously a space in which to concentrate on tasks for the day, it is now primarily a space for interaction with colleagues and clients to exchange ideas. In this report, we speak to architects, academics and companies behind high-profile office developments to understand current work trends and how they are influencing a company's approach to employees and office design. We explore the concept of flexibility on three fronts: flexible working practices, flexible workspaces for cross-functional collaboration and flexible office design to respond quickly to a rapidly changing work environment. Much attention in the media is given to examples of technology companies, but we have chosen to shine a spotlight on a range of sectors beyond technology.

White Collar Factory,
London



KEY FINDINGS OF THE REPORT

1

Changing patterns of work are prompting companies to see workplace design as a way to attract talent. As companies

compete for talent, they are focusing on making their offices an “exciting place to work” to draw people in. Offices are being designed to include large, open spaces for collaborative working and leisure facilities such as gardens, game rooms and gyms. Many firms that have included these on their properties have experienced an uptick in office attendance. Companies are also attracting a new set of skills in response to technological advances and are developing a working environment to match - they are adapting their HR policies and even turning to co-working spaces to house employees.

2

There is a strong consensus on the need for a mix of spaces—open areas for collaboration as well as quiet spaces for concentrated work. Companies

are responding to the flaws of open plan offices, to counter the danger of distractions. They are creating office spaces with roof terraces and cafés for chance encounters as well as atriums with glass-enclosed pods for private work. “If everyone is encountering each other all the time, you get a sort of group think, which is the opposite of creative and different,” says Simon Allford, director at Allford Hall Monaghan Morris, an architecture firm. The onus is on the company to create settings to strike this balance.

3

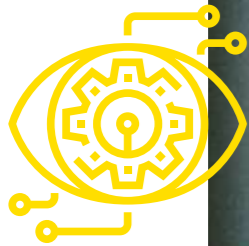
Foot traffic, not headcount, is emerging as the key metric for office space usage. Remote working and mobile working within the office are making

it hard to predict the number of people that will be present at the office at any given time and, thus, the amount of space required. As a result, office space usage is increasingly being measured by footfall in a given space. Companies are piloting sensors that monitor how much a space is used. The information helps identify areas of heavy traffic or those that are underused, so that the office layout can be altered accordingly.



Clockwise from top image:
1-Deloitte, The Edge
Amsterdam photo: Ronald
Tilleman
2-Publicis North American
Headquarters New York
(www.clivewilkinson.com)
3-Bloomberg, London
4-CBRE, London
5-Google, Zurich
([officesnapshots.com/
photos/8449](http://officesnapshots.com/photos/8449))





4

Data privacy and cybersecurity are now key considerations in office design.

As data on employee presence and movements around the office are collected, through the increasing use of smart technologies, there is an ongoing discussion on striking a balance between securing information to improve office efficiency and employee privacy. Employee concerns may be allayed to a certain extent if it is communicated that these metrics are not used in performance evaluation. Intimate data collected on employees are also susceptible to cyberattacks, thus cybersecurity is a growing concern.

5

Companies are paying attention to health and wellbeing standards for offices.

In response to a growing emphasis on health and wellbeing

in the workplace, companies are ensuring their offices meet benchmarks such as the WELL Building Standard. It assesses a building's impact on health and wellbeing, focusing on seven categories of building performance: air, water, nourishment, light, fitness, comfort and mind (cognitive and emotional health). Initial results show an improvement not just in health and wellbeing but overall employee performance as well.

6

Innovative office spaces are being used to engage clients.

Companies have created interactive spaces at their offices to host clients and better demonstrate their capabilities and reinforce their brand. These range from supermarket sets at consumer goods companies to "digital experience" studios at management consultancies.

7

Office design and corporate policies must be responsive to the speed of change.

The pace of adoption of the latest workplace technologies, including artificial intelligence (AI), will influence future organisation size, structures and operations. "If I'm asked what people's jobs will be in two years' time, I don't know, and neither do they," says Leena Nair, chief HR officer at Unilever. Office design must therefore be responsive and can include elements such as wall systems that can be reconfigured within a day, 3D-printed office sections and sharing spaces, enabling dynamic companies to change their office layout periodically as organisational structures evolve. Ongoing training programmes can help upgrade staff skills in desired areas of expertise.

Offices of the future



Exciting new technologies are shaping the nature of work in ways that have yet to be fully understood. Here we showcase a few technologies that may be key features of offices of the future.

AI ASSISTANTS

Platforms with AI can scan an organisation's networks and use machine learning to make business decisions (and understand their impact) using real-time data, including conversations. These can be used to manage tasks from fielding telephone calls to allocating resources on projects.

CUSTOMISABLE WORKSTATIONS

The next generation of customisable workstations could allow workspaces to automatically adjust settings such as light, air-conditioning, and seat configuration based on an employee's preferences. WiFi-enabled sensors placed around the office could communicate with wearables on employees to detect movement and adjust settings. These sensors can additionally be used to manage energy usage at the office. New designs for office furniture, which include electrical panels in armrests and USB ports in tables, allow employees to plug in their laptop or any other device and work from any location within the office.

VIRTUAL AND AUGMENTED REALITY MEETINGS

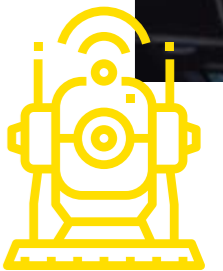
Using virtual reality headsets, employees and clients can remotely engage in a more immersive experience to conduct meetings, training sessions, and product and site demonstrations.

INTERNET OF THINGS

As devices become increasingly connected, the possibilities of syncing various aspects of a workday are infinite—a connected car may automatically know the destination for a meeting from a work calendar and a meeting room can automatically be set up with the right presentation for a meeting.

3D-PRINTED OFFICES

3D printing can potentially help to develop customised and creative office spaces. With a relatively short construction period, it can help companies alter workspaces in line with changes in company structure.



Clockwise from top left: 1–Airbnb, San Francisco, 2– The Hoxton, Holborn, London, 3– Khoo Teck Puat Hospital, Singapore

The Hoxton, Holborn, London

3D-printed office building, Dubai, UAE



Introduction

In May 2017 a cyberattack temporarily crippled institutions globally, from the UK's National Health Service to those in countries as diverse as Spain, Russia and Taiwan. Computers and data were locked and a ransom was demanded to unlock them. It was a powerful demonstration not only of how connected the world has become, but also of how working patterns have changed, with processes and information primarily on digital systems.

The mass attack was ended by a 22-year old working from the bedroom of his parents' house in Devon, England. The days when people needed to go into the office to do even complex international work have long gone. Using laptops and remote network access, people are able to complete at least part of their work from the comfort of their homes or anywhere outside the traditional office. Within the office, wireless networks have enabled the free movement of employees, facilitating collaborative working across teams in more informal settings.

In fact, the changes to working patterns go well beyond the ability to work remotely; technology and increasing globalisation have already changed the nature of many companies, and many jobs. As a result, the desired skill set has evolved. Ian Cox, managing partner at a law firm, Herbert Smith Freehills, explains: "What skills will a very good lawyer need in the future? We may need people with data skills, better client management skills or generally better IT skills, along with all the other legal skills." Many industries, from retail to music, have changed fundamentally—in the US, some 52% of Fortune 500 companies have disappeared since 2000 and the pace of change could well accelerate further.¹

In particular, advances in areas such as AI mean that the type of work people do will probably change further as more areas are automated, or become more reliant on technology. "If I'm asked what people's jobs will be in two years' time, I don't know, and neither do they," says Leena Nair, chief HR officer at Unilever.

What does this mean for the future of the office? In response to evolving work patterns, companies are making significant changes to their HR policies, office design and even company structure. Around the world, companies are incorporating remote working as part of their regular working practices, allowing employees to formally work away from the office two to three days a week. As companies compete for talent, they are turning to innovative office designs, branding themselves as a "fun place to work", to draw in the right mix of skills (examples such as Boston Consultancy Group and Ford Motor Company are showcased in the Spotlight section of this report). But, most importantly, an office is increasingly becoming a place for social interaction and an exchange of ideas.

In the chapters that follow, we explore how companies are assessing office space usage and creating workspaces to foster flexible working practices, facilitate collaborative working and drive creativity and productivity. Finally, we explore how companies can prepare for the unknown as AI and robotics drive further changes to the way people work.

"If I'm asked what people's jobs will be in two years' time, I don't know, and neither do they"
Leena Nair, chief HR officer, Unilever

¹ <https://www.constellationnr.com/content/research-summary-sneak-peeks-constellations-futurist-framework-and-2014-outlook-digital>



CHAPTER 1
**Office away
from the office**

Coffeebar Café, Vancouver

CHAPTER 1

Office away from the office

Advances in technology have fuelled people's desire for more flexible working arrangements and, in parallel, given companies the ability to meet those requirements. The number of people working from home has soared: in the UK, for example, the number has surged by a fifth over the past decade to 1.5m, roughly 5% of the total workforce.² Global Workplace Analytics, a research firm on agile working, says that half of all workers in the US now have jobs that are compatible with telecommuting, or working remotely, with most people saying they would like to do at least some work from home.³

Look in more detail at the statistics and it becomes clear that a hybrid way of working is developing, which combines some remote working with a solid presence in the office. Analysis by Global Workplace Analytics suggests that the majority of employees who would like to work remotely regard two to three days a week outside the office as offering the right balance between concentrated work at home and collaborative work in the office. Although few companies allow all of their employees to work from home, around a quarter of staff in the US, for example, now work remotely at least some of the time, and the numbers are growing fast: those doing at least part of their work from home has surged by 115% since 2005.

Companies are responding to this by formalising remote working practices. Herbert Smith Freehills, an international law firm, launched an agile working programme two years ago, which encouraged its staff to work from home at least one day a week. Mr Cox explains that they observed a clear improvement in productivity. On average, chargeable hours were higher when working remotely than at the office.

WE ARE ALL TECH BUSINESSES NOW

The impact of technology, however, goes well beyond allowing more people to work remotely. Data generated from almost every aspect of the business are driving core activities, from corporate strategy to developing new products and services. And therefore companies from banking to automotive and from law to accounting are increasingly tech-focused.⁴

This means that companies are looking to attract a different skill set, including a growing number of data analysts and IT specialists. As a result, the likes of Goldman Sachs and Ford are competing with tech giants like Google for the same talent. This has been part of the motivation behind investing in large, innovative workspaces such as Ford's Dearborn campus transformation, which emphasises the importance of technology and collaboration.

It has also driven changes in HR policies. "As the competition is so fierce from organisations like Facebook, Google and others, we definitely have changed our working practices for these folks," explains Sally Boyle, international head of human capital management at Goldman Sachs. "[Data analysts] are allowed to dress casually every day. They are also allowed to work from home five days a week; it is not common for other employees to work from home every single day of the week."

Deloitte's solution has been to house digital staff not in the glossy headquarters building but in a down-to-earth space in Clerkenwell, a part of London preferred by informal tech-types. It

The likes of Goldman Sachs and Ford are competing with tech giants like Google for the same talent.



Betahaus co-working space, Barcelona

Remote working and an increasing reliance on freelancers and external specialists are changing office space needs.

has also recently signed a deal to rent a co-working space. It is an idea that is taking off more widely, and Deloitte is just one of several large companies trying to buy into the freewheeling nature of the idea. IBM, for example, houses some of its app developers in co-working spaces. Using freelancers is gaining

in popularity as well. Ms Nair at Unilever accepts both that the number of people on full-time contracts could fall further (as it has been doing steadily, with staff numbers down to 169,000 in 2016, from 206,000 in 2005) and that the total number of people working for the company could rise—

| Views from Brockton Capital**Fora: Reimagining the one-size-fits-all office**

With seven different work zones ranging from a traditional office to a sleek library, lounge and café, "pro-working" space provider [Fora](#) reimagines the workplace with individual preferences in mind.

"We put the customer in the centre, and build the real estate around them and their individual working needs," says Fora co-founder and CEO Enrico Sanna.

Having held senior management positions at one of the world's largest investment banks as well as a string of top hotels around

Fora is owned by a Brockton Capital fund.

the globe, Mr Sanna is uniquely positioned to interpret the relationship between individuals' working preferences and financial performance.

"Understanding how you break up the space is critical," he says. "You walk in here and you get this sense of energy, people are collaborating and giving presentations; but when you need to do some writing it's important there are environments to suit that as well."

With two hotel-style workspaces currently in London and five more in the works, Fora's premium service and design are attracting attention from start-

ups and established firms alike. Demonstrably more cost-effective for companies with under 100 employees, Fora's "owned office" system encourages businesses to stay for as long as they want, says Mr Sanna, who wants occupants to modify their office however they see fit, while continuing to benefit from the environment outside the office door. Fora's "don't think about the desk" philosophy is shifting perceptions of the office from the four walls we inhabit between 9am and 5pm to the different environments necessary to make the working day as productive as possible.

HOW MUCH OFFICE SPACE DO WE REALLY NEED?

Remote working practices and the use of external resources have made it increasingly difficult to predict staff presence at the office and thus actual office space required. Global Workplace Analytics states that 50-60% of staff at Fortune 1,000 companies are not at their desk at any one time. This

may slash the need for space, as companies no longer need to house all of their staff, but just those who are actually in the office at any one time.

According to Andy Warner Lacey of architects HOK, international broadcaster BBC World's London office has 6,000 staff on its roster but has only 3,500 workstations. Andrew Barnes, director at Jones Lang LaSalle, also attests to this: "Over the last few years, office space per employee has dropped from 120 sq feet to 85 sq feet, and in some cases as low as 65 sq feet." At Deloitte, Mr Esplen says that office space per worker has effectively been halved in recent years, and is influencing how companies approach office leases as well. Some 20% of the firm's office space is now on a short-term lease (below five years).

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Space is no longer measured by headcount, but rather by foot traffic in a given space.

Designers are concentrating on making office space more flexible in the light of changing staffing requirements—for example, many office car parks can now be turned into extra office space if necessary, as the space required for

parking reduces with fewer people in the office.

In fact, in some companies, space is no longer measured by headcount, but rather by foot traffic in a given space. Unilever offices are piloting sensors, some built into lighting fixtures, that allow them to monitor the utilisation of spaces. Ms Nair explains that the information gathered allows them to identify areas of heavy traffic and those that are being underused. These sensors synced with a mobile app can also allow employees to see which desks at the office are available for use that day. Beyond traffic, sensors can help monitor the quality of the environment, including noise, temperature, humidity and carbon dioxide levels, for instance. Correlating these with space usage levels can provide management with valuable information to adjust the office layout and environment. "This focus on space as an enabler of activity and using data to support our decisions allows us to be increasingly effective in how we manage our space while improving the overall employee experience," says Ms Nair.

DATA CONCERNS: PRIVACY AND CYBERSECURITY

Max Holliday, director of real estate at WPP, cautions against the temptation to collect too much data on employee movements through sensors and security systems: "We're asking ourselves what data we really need and then we figure out how to capture it, as opposed to placing sensors everywhere—on desks and lighting—and collecting vast amounts of data that we're not going to use." This is relevant in the broader discussion around surveillance of employees and their privacy. This hotly debated issue will only intensify if wearables or personal devices are used to monitor physical activity of employees in the future.

Anonymising data is one solution, says Mr Holliday. "We just need to know that an individual has come into the office and how they are using the building. We can build that knowledge based on ones and zeros rather than actual individual names." A second, and perhaps more important, approach is that employees must not be evaluated based on these metrics (eg how much time they spend at their desks). "It's not a scientific way to gauge if employees are performing effectively," explains Mr Holliday. Ensuring that this is communicated effectively to employees is vital.

With increasing data usage and adoption of smart technologies in offices, cybersecurity is a key consideration in office design. Data collected on employees through office security systems may be vulnerable to attacks. Recent incidences of cyberattacks on corporations around the world mean that those planning new offices with sophisticated technologies need to remain cautious.



Creative agencies such as WPP also rely on utilisation surveys to assess office space requirements on a project basis. This entails a combination of data analysis (from access passes and sensors) and actual observation of team behaviour.

DO WE EVEN NEED AN OFFICE?

Look at the headline figures, and the extent of change at the company level is questionable: they might suggest that most companies are sticking to the traditional 9-5 work culture, despite staff demands for more flexibility. In the US, although 80-90% of people say they would like to telework at least some of the time, only 7% of

companies officially give most of their employees the option of working outside of the office.⁶

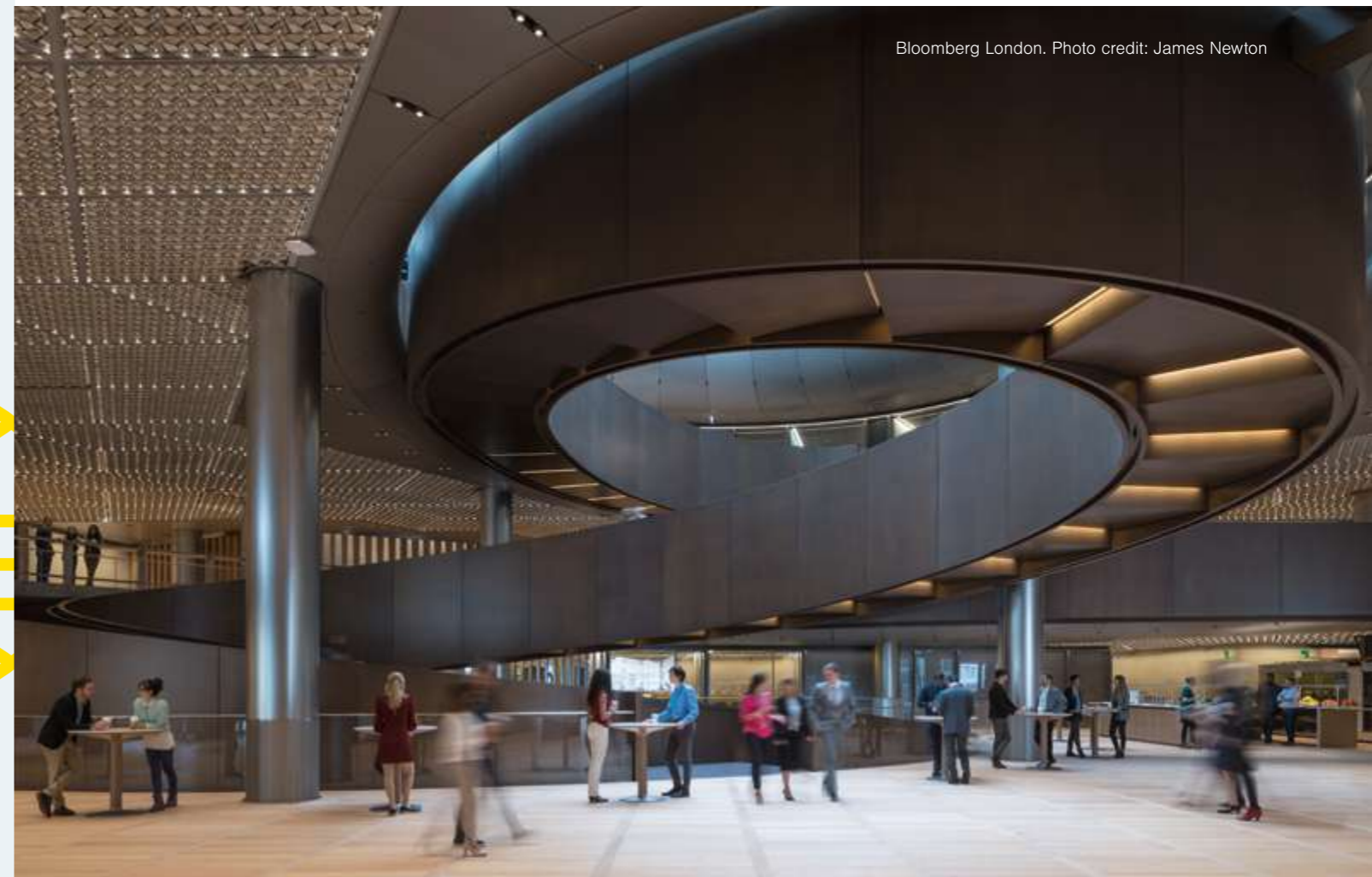
This might suggest a conflict, with companies struggling to prevent staff from working more flexibly. There is some truth to this: companies including technology firms Yahoo and Reddit, and a consumer electronics company, Best Buy, have clamped down on home or flexible working in recent years. People are "more collaborative and innovative when they're together," said Yahoo's former chief executive, Marissa Mayer, explaining her controversial decision to ban home working in 2013. She gave the example of

Yahoo's weather-app team and the Flickr team, who worked together to show appropriate weather photos in the app (Yahoo has since been acquired by Verizon). Mr Barnes acknowledges this sentiment in the market as well: "There is a bit of pushback against working from home. Employers want to have their employees spending time networking, bumping into each other, being creative." Certainly, such collaborative working has become central as companies ask themselves what the function of the office is, now that relatively few people need to be physically present. We explore a new definition for office space in the next chapter.

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⁶ <http://globalworkplaceanalytics.com/telecommuting-statistics>

Bloomberg London. Photo credit: James Newton





CHAPTER 2
**The role
of the office**

Boston Consulting Group, New York;
Photo credit: Anthony Collins



CHAPTER 2 The role of the office

The role of the office is being redefined. With employees working remotely in increasing numbers, what is the need for a physical office? Peter Murray, chairman of New London Architecture, explains, “the point of the office is almost exactly the opposite of what it was in the early days of the manual typewriter, when you just brought everyone together to work on their own thing with relatively few meetings. Today, people come into offices to meet socially as part of a team, to get together and share ideas.” This includes not just employees, but clients as well. In addition, it provides employees with a vital distinction between work and play. Anna Sawbridge, industry head at Google (speaking on her own behalf) says: “Could I do what I do from home? I’m sure to a certain extent, but my home is not set up as a workspace, it’s set up as a home. The two are very different and I like maintaining that difference, it keeps me refreshed.”

In this chapter, we explore what corporations and experts believe to be the core functions of the office—to foster collaboration and creativity; manage people and their development; and facilitate innovative interactions with clients. In addition, we explore the role of the office in supporting employee health and wellbeing.

CREATIVE COLLISIONS

Clive Wilkinson, the architect behind Google’s famous headquarters, Googleplex, believes that the core function of the office is to foster creativity, through collaboration and exchange of ideas. The approach, he says, was pioneered by creative companies such as advertising agencies, not by the tech giants. “They really do live and die on ideas. If their campaigns tank they can lose an account that’s worth a huge amount of income.”

The office, however, should be conducive to such interaction, in terms of corporate policies and design. It requires companies to adopt “activity-based working”, which Mr Wilkinson defines as “highly supported mobile working, offering employees a suite of options about how and where they work within the office. You study the activities within an office and then you prescribe work settings to support those activities.”

In terms of office design, it has led to the creation of shared spaces to facilitate collaboration. It’s about creating exciting, interesting environments, where people want to come in to the work space and want to engage with their colleagues, says Mr Holliday of creative agency WPP. “And importantly, it’s about creating choice.” Although companies do continue to use fixed desks, there are opportunities for staff to shift position according to the type of work they are doing, as companies emphasise the need for different teams within the firm to collaborate as needed. WPP’s office buildings today retain about 40% of space on each floor that can be used by employees from any floor.

There are architectural considerations to foster creativity. David Rosen, senior partner at Pilcher Hershman, points to three key ingredients: volume, light and character. These are inherent in old industrial buildings that are being regenerated as office space. For creative businesses, “this means inspiration,” he says. But Mr Rosen uses “creative businesses” as a catchall for those ranging from law to technology: “You look at law firms, at consultancies, they are now embracing those spaces; they would never have dreamt of being in a building that a creative firm occupied. The new order is Amazon, Google, Facebook, Apple—they are the new institutional businesses. But they are all emanating from a creative spirit.”

“It’s about creating exciting, interesting environments, where people want to come in to the work space and want to engage with their colleagues,”
Max Holliday, director of real estate, EMEA of creative agency WPP.

| Views from Brockton Capital

The Post Building, London: Raising the roof on creativity

Situated on a prominent island block bordered by New Oxford Street, High Holborn and Museum Street, [The Post Building](#) – a 263,000-sq-ft former Royal Mail sorting office – is being recreated as the West End’s newest headquarter office building.

Originally designed to house huge conveyer belts transporting post and packages, some ceiling heights reach six metres, giving the building an immense sense of volume and depth.

In the building’s new role as an office space, these soaring

ceilings serve an important purpose. Known as the Cathedral Effect, higher ceilings have been shown to have a positive impact on people’s cognitive functions, improving their creative and decision-making capabilities, and ultimately their productivity and wellbeing.

For the building’s architect, Simon Allford, it was this existing volume that inspired his design. “It’s something you’ll never be able to build again, so the original building itself was an inspiration.”

“What you’re really trying to do is provide little incidents along the journey where you might encounter someone. In The Post Building that’s the private

terraces, the central staircase, the generous lift lobbies, the roof garden with a series of ‘garden rooms’, and what I call a ‘Mary Poppins’ view over the rooftops of London – all of which provide places to step away from your desk, to pause and reflect.”

Located amid five of the capital’s central neighbourhoods – Bloomsbury, Fitzrovia, Holborn, Soho and Covent Garden – The Post Building is at the heart of a rich and creative London mix. “I’d like to return to the building in 10, 20, 30 years’ time and discover that it’s continually being reinvented by those who use it,” says Mr Allford.

There are architectural considerations to foster creativity. David Rosen, senior partner at Pilcher Hershman, points to three key ingredients: volume, light and character.

The Post Building is a joint venture between Brockton Capital and Oxford Properties.



White Collar Factory, London

Goldman Sachs in London, which will be moving into a new office space in 2019, says it is prioritising large spaces and light. But although companies are regenerating old industrial buildings to check the “volume” box, White Collar Factory in London is the first new build to accommodate a floor-to-ceiling height of 3.5 metres. “They’ve actually consciously lost [floors] to create cubic capacity!” explains Mr Rosen, reiterating this interest in large, open spaces.

22 THE DANGER OF DISTRACTIONS

However, although such thinking is now widely accepted in the design world, it has its critics. Dave Crenshaw, a consultant and author of *The myth of multitasking*, says that more than a quarter (28%) of staff time is lost to “distractions...and the disruption multiplies when you have open-plan offices designed to encourage interaction.” Mr Wilkinson does not actually dispute the point, rather saying that ideas have continued to evolve so that designs now emphasise the need for a mix of spaces, including areas for concentrated work as well as more open areas for mingling.

This is evident in the office space designed for Macquarie, an investment bank in Australia —another landmark project that many have borrowed from. It is split into two blocks linked by a bridge to create a massive atrium, with plazas, gardens, a

dining room and a café, among other landscaping and leisure features. More importantly, there is a recognition that people require quiet workspaces as well as communal areas. Inside the atrium there are 26 glass-enclosed meeting pods, and the functional parts of the building are divided into flexible workspaces (or “neighbourhoods”), each accommodating about 100 of the 3,000-plus employees. Nobody has an assigned desk, although they do have their own lockers. Rather, employees can choose each day where and how they want to work, from collaborative benches and open lounges to small private stations for quiet work.

The onus is on companies to create settings to strike the necessary balance. Simon Allford, director at Allford Hall Monaghan Morris, an architecture firm that has designed offices for Google and New Scotland Yard in London, explains: “Of course there are moments of serendipity. But in most cases, because we’re in a creative, knowledge-based office, you need to simulate the kind of environment where people get together, debate an issue, spark a few ideas and then go off and work on their own. If everyone is encountering each other all the time, you get a sort of group think, which is the opposite of creative and different.”

At the heart of the strategy to create a mix of spaces, though, is improving productivity. Many

attest to the positive impact activity-based working has had on productivity and attendance. Ross Love, New York managing partner of Boston Consulting Group, explains that their new office in New York is designed squarely to increase staff collaboration (especially chance encounters). This has been one way to increase efficiency, as it cuts the need for time-consuming formal meetings. He gives his staff the flexibility to work outside of the office, but says that attendance has increased since the move to a new building with extensive leisure facilities (see case study).

PEOPLE MANAGEMENT AND DEVELOPMENT

The office has long been a place to monitor employee progress. But even today this remains a vital function of the office. Ms Boyle explains: “People need to be managed, recognised

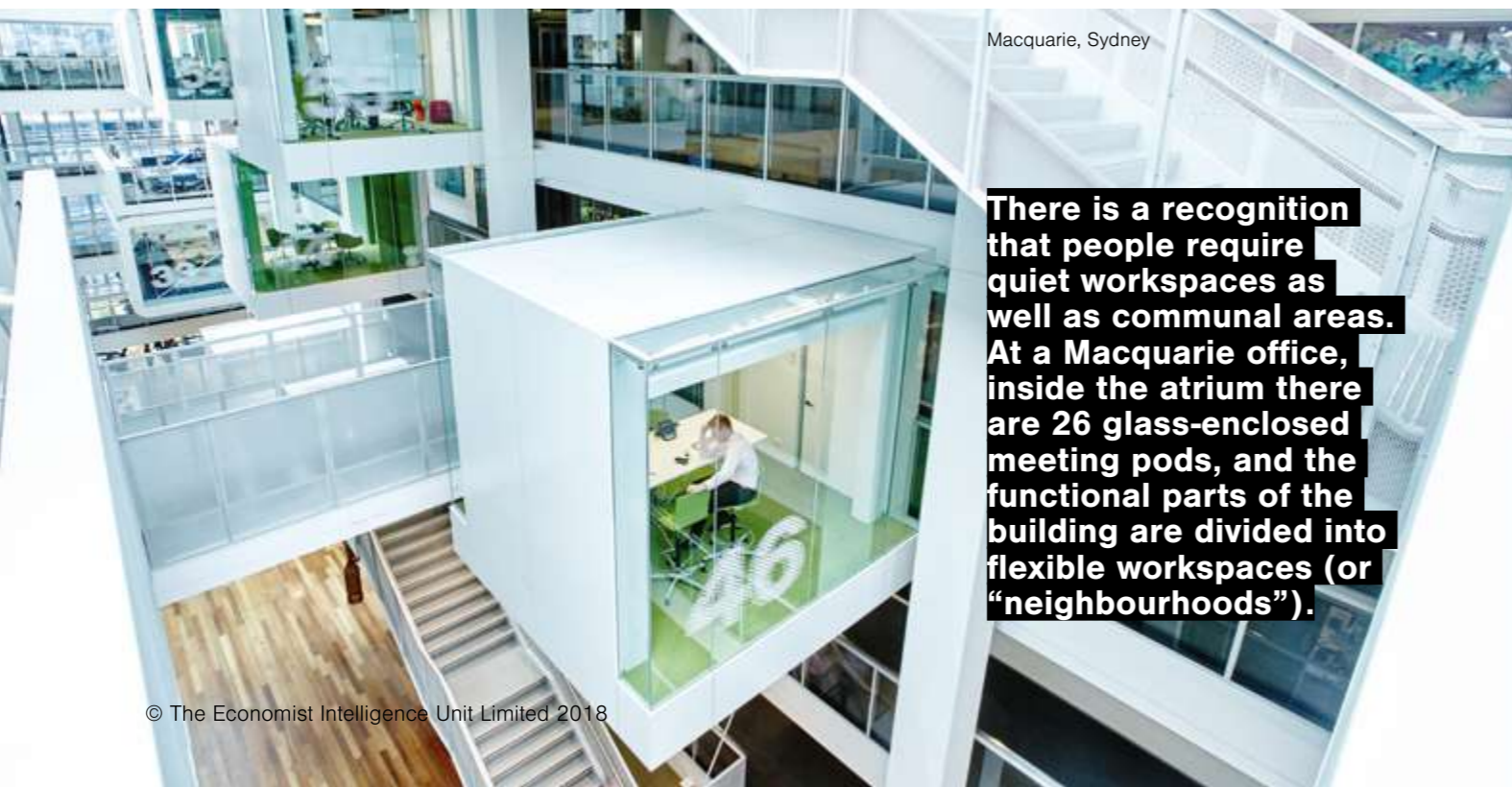
and developed. I think the office provides a place where people can come together, and managers and employees can talk face-to-face about their development. It is much harder for this kind of management to take place remotely.”

Part of providing development opportunities is a robust training programme. Many experts associate the younger generation’s affinity for job-hopping with a running down of training budgets and narrow career opportunities within companies, which leave young people believing they must change jobs to progress. But some firms such as Unilever and Ford are using regular training programmes to upskill employees and plug skills gaps against a backdrop of rapidly changing industries (see case studies). Ms Nair of Unilever explains how the company has adapted

“You need to simulate the kind of environment where people get together, debate an issue, spark a few ideas and then go off and work.”

Simon Allford, director,
Allford Hall Monaghan Morris

training programmes for the next generation: “I’m a big fan of bite-sized learning. The attention span of our generation has fallen and people find it harder to focus. Long training programmes, for instance over five days, have their role to play, but there’s not that many you can do in a year. Bite-sized learning, such as a video created by a peer on what they’ve learned, that is the way you learn.” Julie Lodge-Jarrett, chief talent office at Ford, attributes their low company turnover (“below 5%”) in part to a strong company culture, achieved through training and global career opportunities.



Macquarie, Sydney

There is a recognition that people require quiet workspaces as well as communal areas. At a Macquarie office, inside the atrium there are 26 glass-enclosed meeting pods, and the functional parts of the building are divided into flexible workspaces (or “neighbourhoods”).

| Views from Brockton Capital

Mailbox: Space for work and so much more

At almost a million square feet, the [Mailbox](#) in Birmingham is Britain’s largest multipurpose building outside London. With 25 restaurants and cafés, two hotels a 300-seater Everyman cinema available for corporate screenings, and 24-hour parking, the former Royal Mail sorting office offers businesses a vibrant and immersive working environment.

In 2015, retail giant Harvey Nichols announced that the Mailbox would be home to its

The Mailbox is owned by a Brockton Capital fund.

new flagship store. Two years later, the branch has become the blueprint for Harvey Nichols’ stores across the country.

However, the Mailbox has also been remarkably successful in attracting office-based companies from a broad range of industries.

“In the war to attract and retain talent it’s not just important to think about how exciting and interactive the core space is, or how cost-efficient it may be, but to consider how amenity-rich the environment outside the office door is,” explains Alex Wright, associate partner at one the Mailbox’s major

stakeholders, Brockton Capital.

One global firm that has recently benefited from the Mailbox’s pulling power is tech giant Advanced. “We are finding that the Mailbox is absolutely brilliant for recruitment. It just draws people to us, and we are incredibly proud of that,” says Advanced’s Chief Strategy Officer Greg Ford.

Alongside the BBC, Advanced joins the list of companies at the Mailbox that are seeing the advantages of working from a premier working environment that doubles as a shopping and lifestyle destination.

Companies are adapting their mobility programmes too. Ms Boyle of Goldman Sachs explains a shift in their policy: “We used to have rules where employees had to be in the firm for at least 18 months before they could apply to move to a different role within the firm.” Employees at Goldman Sachs no longer have to be with the firm for a particular period of time before they apply for a move. “We hear people are very keen to move around and get different experiences quickly within the firm.”

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OFFICES: A PLACE FOR CLIENTS

Beyond a place for employees of a firm, offices are a place to host clients as well. As a result, the office itself is seen as a part of the branding and sales efforts, showcasing company culture

through furniture, artwork and other elements of office design.

Companies are taking this a step further, crafting unique spaces at the office to demonstrate their capabilities. At Unilever, some meeting rooms are set up as mock supermarkets to take clients on the customer journey. At McKinsey & Company, Emma Hammond, director

Googleplex, California

“It’s no longer just people sitting around a table and having a meeting. It could be a hackathon, a problem-solving session, a digital experience studio, build-operate-transfer—so there are different kinds of experiences that clients want and that requires different spaces”

Emma Hammond,
McKinsey & Company



of real estate, explains: “It’s no longer just people sitting around a table and having a meeting. It could be a hackathon, a problem-solving session, a digital experience studio, build-operate-transfer—so there are different kinds of experiences that clients want and that requires different spaces.”

WORKPLACE HEALTH AND WELLBEING

Speak to companies building or renovating their offices and there is widespread recognition of the need for workspaces that improve staff wellbeing through the use of natural light and colour, among other things. As a result, many of the big new developments are being built around these principles, although perhaps surprisingly there is no binding requirement to meet them.

Ford’s ambitious new headquarters emphasise the use of landscaping, and Unilever, which is redeveloping its offices around the world, stresses employee wellbeing and sustainability. The big tech companies such as Google and Amazon all famously emphasise the use of open green spaces and landscaping in their campus-style offices.

One area that is of increasing interest is biophilic design, essentially catering for humans’ innate desire to be surrounded by nature—a problem for many of today’s city dwellers. Oliver Heath, a leading biophilic designer, explains that this is not just a matter of ensuring that workers have plenty of natural light and can see greenery from their desks, although this is important. It also about biomimicry, where for example, interior design reflects natural colours and textures, and imitating natural light patterns through office lighting that is bright at the start of the day and dims when dusk approaches—essential for maintaining a healthy body clock.

“Numerous studies have shown that biophilic design can improve performance and feelings of wellbeing,” he says. His claims are big, and backed up by research.⁷ One study records increases in productivity by 8% and wellbeing by 13%. The same study records a fall in absenteeism and presenteeism (when you are physically present but not working). Educational and health results improve too. Again, such thinking is widely accepted in the corporate and design worlds these days. He cites

Apple, Google and Amazon as among those investing heavily into biophilic design in their green and open work spaces.

This is not new, and such thinking was obvious even in the 12-year old Googleplex. However, although formal standards for environmental design—such as Leadership in Energy and Environmental Design (LEED) and Building Research Establishment Environmental Assessment Method—are well-established, formal structures to assess the impact on wellbeing have only recently been developed. The WELL Building Standard was only introduced in October 2014, and now covers around 450 buildings. It assesses a building’s impact on health and wellbeing, focusing on seven categories of building performance: air, water,



Facebook, Tel Aviv
Photo credit: Itay Sikolski/Office Snapshot

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nourishment, light, fitness, comfort and mind. “We spend more than 90% of our time indoors,” says its CEO Rick Fedrizzi, “which means that buildings and everything in them can have a profound effect on human health and wellness.” He cites lighting and indoor air quality as having “a particularly significant effect on human health and wellness.”

The first building to be WELL Certified through the pilot programme was the headquarters of

real-estate advisors CBRE in Los Angeles. One year on, a survey found that 92% of respondents said that the new space had improved their health and wellbeing; 83% felt more productive; and 94% said that the new space had improved their business performance. Mr Fedrizzi says that the idea is catching on fast worldwide, and several of the projects we look at in this report, including Deloitte’s headquarters, are aiming for a high level of WELL Certification.

Views from Brockton Capital

The Porter Building: Designed for health and wealth

Standing opposite Slough’s new Elizabeth Line (Crossrail) station, [The Porter Building](#) is Britain’s first office building to receive a gold-standard WELL Core & Shell Certification through the International WELL Building Institute, recognising the space’s unique commitment to human health and wellness.

“As the number of people leaving jobs because of mental stress overtakes the number leaving due

to physical illness, employers are beginning to acknowledge the office’s role in keeping staff happy and healthy,” says Tony Edgley, Partner at Brockton Capital.

A study conducted by Harvard University earlier this year found that improved air quality increases cognitive function by 61%, with subjects’ strategic faculties rising by as much as 182%. Traditional office blocks recycle 80% of their air. Edgley explains that improved air quality is a cornerstone of the building’s biophilic design, an approach to architecture that aims to connect man-made environments more closely to nature.

Alongside hyper-modern air and water filtration systems, The Porter Building also makes greater use of natural light. A glass atrium running through the core of the building ensures that occupiers are never more than nine metres from a window.

“It’s a greater initial cost, but if you’ve got less people getting ill because they’re not breathing in recycled air or working in artificial light, the financial benefit of that massively outweighs the cost,” says Edgley, adding that people are also happier to work for a company that values their health.

The Porter Building is owned by a Brockton Capital fund.

⁷ <https://www.terrabinbrightgreen.com/reports/the-economics-of-biophilia/>

SPOTLIGHT

An in-depth look at non-conventional examples showcasing the workplace values of the future—flexibility, collaboration, sustainability and wellbeing

A FUN PLACE TO WORK

How the Boston Consultancy Group (BCG) has persuaded its workers back into the office

Just 15 years ago, BCG moved into new headquarters in midtown Manhattan. The building's design was highly traditional, revolving around private offices that seemed a decent match for management consultants' mix of head-down work and meeting clients in one of the swankier bits of New York. "It was not a fun place to work at all," says Ross Love, New York managing partner, when asked why the firm not only switched offices recently, but also completely changed its thinking on office space.

In late 2016 BCG moved away from its central location to Hudson Yards, a giant new development on New York's West Side. "It takes people an extra ten minutes to get to work on average," says Mr Ross. Nonetheless, staff surveys suggest that people spend

more time in the new office than the old one.

Essentially, as people no longer need to come into the office, the firm must sell the office to them so that they want to work there, says Mr Ross. "The biggest change is that technology allows people to work from anywhere," he says. "Our consultants tend to be very mobile and, in contrast to 15 years ago, they no longer need to come into the office to connect and print. Conversely, that has made the

role of the office even more important than it was because the actual interaction between people is a really important anchor to the process."

At its new location, 10 Hudson Yards, part of a redevelopment of an industrial area, BCG was given a blank, open canvas for its office. It allowed them to respond to their staff's chief demand: to be able to create their own space.

Overall, the design revolves around the creation of a variety

of spaces to meet the staff's demands for private time and team projects, as well as an open area that encouraged chance encounters to develop informal contacts.

Each of the six floors is divided into three "neighbourhoods", with a cluster of workstations, both sitting and standing. Consultants who use the office more occasionally do not have assigned desks, although they can book offices or spaces and input their personal settings to the computer systems. Everything is done wirelessly (there are not even any phones) to encourage mobility—and also, as Mr Love admits, "to save US\$1m over a wired-up office."

There are 150 staff in support functions such as finance (out of a total of 500 BCG employees). These still remain tied to their desks and are given their own dedicated workstations situated in central hubs. Like the mix of space, the different treatment for different types of staff marks a recognition that simply designing offices as co-working spaces for mobile workers is too crude. Support hubs are located close to the staircases that staff are encouraged to use to keep fit.

Staff are attracted into the office through the communal atmosphere and the site's numerous leisure facilities such



Boston Consulting Group, New York. Photo credit: Anthony Collins



Boston Consulting Group, New York. Photo credit: Anthony Collins

as cafés. From the figures, the new approach to the office seems to be working and staff seem to prefer it over the old arrangement. "They're attending the office between one and three extra days a week," says Mr Love. "We really are drawing people in."

PREPARING FOR CHANGE

Ford rethinks its global headquarters as technology changes its business

The next decade, says Ford's Ms Lodge-Jarrett, will see more change in the auto industry than the previous 100 years. She talks of Ford's commitment to become the world's most trusted "mobility" company rather than a simple car maker as attention switches to electric and autonomous (self-driving) vehicles. Add on the growing importance of data analysis—Ford uses the information

generated by its increasingly connected vehicles to better understand customer habits and preferences—and the company is competing with Silicon Valley for data specialists, not to mention tech companies like Google that are developing their own autonomous vehicles.

Developing autonomous and connected vehicles, and leveraging data generated by these more effectively, were part of Ford's "smart mobility" strategy, which it launched in 2015. That is one reason why, in April 2016, Ford announced a conversion of its sprawling network of offices around its home base of Dearborn, Michigan, into two primary, campus-style developments designed to foster more creative and collaborative working. (Another is simply that redevelopment of headquarters buildings, sometimes dating back to the 1950s, is perhaps

long overdue.) One will be a product centre, including a new design centre. The other will be built around Ford's existing headquarters building, a 1950s structure commonly known as the Glass House.

The Dearborn Campus Transformation master plan was completed by a local Detroit firm, SmithGroupJJR, one of the leading proponents of collaborative workspaces; Ford visited several existing examples of the idea in action, including Michigan and Stanford universities and tech companies such as Google, before finalising the design concept.

The resulting master plan is reminiscent of the Silicon Valley firms with which Ford competes for talent. There will be walking paths and trails; electric bikes and even (it is planned) self-driving cars to get around the campus; a heavy emphasis on sustainability (with plans to cut water consumption by half from today's offices); and a determination to obtain LEED certification through efforts such as sustainable material selection. "There's also an emphasis on collaborative working," says Ms Lodge-Jarrett, pointing out that the design encourages team collaboration.

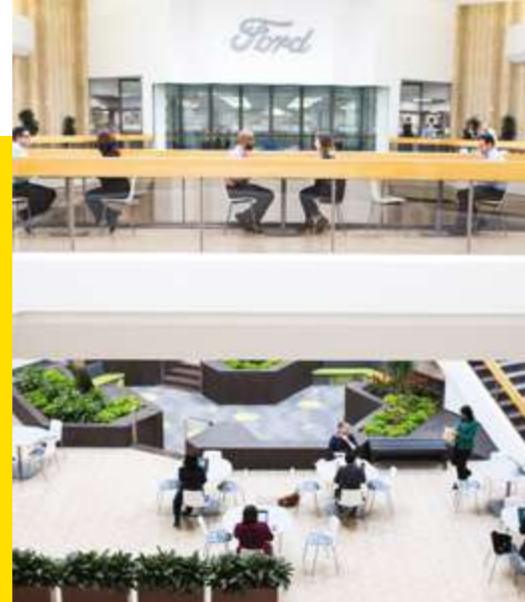
Ms Lodge-Jarrett accepts that the company needs to attract new types of people as its business changes, and that the new campus is important for

achieving that. However, she does sound a note of caution. Ford's core business remains designing, manufacturing and marketing vehicles. It is important to strike a balance between acquiring new talent and not losing their core skills and company culture. Part of achieving this is to go back to HR fundamentals, such as offering continuous training and global career opportunities, but it should also be reflected in the office design. Ford is changing, but not to the extent that it can ignore its basic skills base.

A FLEXIBLE FUTURE

At Unilever, flexible work practices are reducing the need for permanent employees, allowing office space to be used for collaborating in innovative ways

In 2017 consumer goods giant Unilever opened its new national headquarters building in Indonesia and its new regional headquarters in the United States, both at costs of around US\$100m. Consolidating numerous offices into main hubs, the emphasis was on flexible, activity-based working; sustainability; and employee wellness. They are, therefore, classic examples of current design thinking. Except for the fact that Ms Nair points out they got there early—as these are some of the last offices to be



Ford Motor Company, Michigan

redeveloped under a five- or six-year plan to rethink its offices globally. "We've pretty much gone away from [traditional] office spaces everywhere," she says. "It's open spaces, collaborative team spaces that offer agility, flexibility, lots of virtual meeting spaces, learning spaces, quiet spaces. We've just opened it up."

A decade ago, Unilever launched a drive to improve the sustainability of its products and image, and all of its offices are required to meet high environmental and wellbeing standards under programmes such as LEED and WELL Building Standard, respectively. There are also numerous leisure and religious facilities on site.

But above all, Ms Nair emphasises the need to adapt to the rapidly changing nature of work. Technological advances will automate many office functions, taking menial tasks off staff shoulders. She sees the need to constantly update skills, for example, training marketing staff in social

media, which now accounts for 20% of marketing spend.

The changing nature of work extends beyond this, however. "Permanent employment will come down," says Ms Nair, partly because many routine jobs will be automated: the company now employs 169,000 people worldwide, down by more than a quarter (28%) since 2003⁸, and Ms Nair accepts that the number will probably continue to decrease. However, this does not mean the company will employ fewer people overall. "The nature of permanent employment is changing," says Ms Nair. "It's what we call the 'gig economy'—talented people working freelance come in and do a gig and then leave. Work is less permanent, more flexible.

By 2020 almost 20% of US workers will be contingent, that's not permanent." Unilever is experimenting with using freelancers in some departments, in a move it clearly expects to expand.

Although Unilever has created a variety of spaces for collaboration among employees, it has extended this concept to clients and consumers as well. They encourage visits from clients and consumers, not just for meetings but also to see and try products. "We literally create the shops within the office so that one of the rooms is dedicated to creating a little supermarket," says Ms Nair. "You can see how our products

UNILEVER OFFICES WORLDWIDE:

1,400 PROPERTIES,
OF WHICH
114 ARE LARGE
OFFICES

look on the shelf and we can see how consumers shop. It helps to bring the conversations of consumers and customers into the workplace."

Judging by Unilever, the vast office spaces that most big companies still possess are becoming less important for housing their staff, but increasingly important for their wider work. It is a very different role for office space. ■

⁸ Unilever

Unilever virtual supermarket, UK



CHAPTER 3
**Preparing for
the unknown**

L'Hemisferic, Spain

CHAPTER 3

Preparing for the unknown

It is hard to envision what will drive the next wave of change in workplace dynamics, but many companies are keeping close tabs on developments in AI.

At a fundamental level, it is expected to release staff time from menial and repetitive tasks. For example, in the field of law, document searches could be completely automated and in accounting, transactions could be audited in real time—a big shift from the current human, sample-based, approach.

Among early workplace applications of AI that can be adopted across sectors are AI office assistants. Amelia, an AI system developed by IPsoft, has the ability to scan an organisation's networks and use machine learning to make business decisions (and understand their impact) using real-time data, even from conversations. IPsoft's chief commercial officer, Jonathan Crane, explains that Amelia will be able to handle routine customer enquiries, only passing the call to an actual person if it is unusually complex. "If most queries boil down to the same six points then why can't you answer them automatically?", he asks. He claims that Amelia can understand people's mood and engage them in fluid conversations. Similarly, French media giant, Publicis, is developing an AI-powered personal assistant for its staff called Marcel. One task they are testing is "creative crowdsourcing", matching staff across teams and geographies to a project.

Although the pace of commercialisation and adoption remains to be seen, AI office assistants certainly have the potential to change the way that companies and employees operate. The spectre of mass redundancies looms—as fewer people may be required to complete the same

amount of work. The party line, however, is that such technology will free up employees for higher value work.

With AI still at a nascent stage, predicting its impact on the number of employees and the office space a company will need is a tough ask. But in attempting to do so, experts return to the fundamentals. "We assume the new technology would reduce the demands for in-person [interaction], but I think that we are still fundamentally social animals", says Jeff Risom, managing director at Gehl, a global urban design practice. "I agree that companies may not want to build as much office space for all of their employees because people will be working in different places but I don't think that we're ever going to minimise the need or desire for in-person, physical contact. If anything, I think technology will only emphasise the importance of it."

STRATEGIES FOR OFFICE FLEXIBILITY

With so many variables, it is hard to predict how the nature of work will evolve over the next five to ten years. What everyone can agree on, however, is the need for flexibility. "Office spaces are like a living organism," says Mr Holliday of WPP. "It should change as the company changes over time. What may be right on day one probably won't be right in a year's time." Companies must build in the flexibility necessary to keep up with the rapid pace of change likely to stem from further technological advances. This has implications for a company's approach to HR management and office design.

In terms of HR, some envision a new form of collaboration as companies take on fewer full

Companies must build in the flexibility necessary to keep up with the rapid pace of change likely to stem from further technological advances.

time employees and increase their reliance on freelancers and external specialists for tasks on an ad hoc basis. Mr Allford explains: "I could imagine people being employed for project-based activities in collaborative ways, rather than the current model where you work in one organisation and meet other organisations mainly in formal spaces. I can imagine those kinds of things breaking down." This affords companies more flexibility in terms of drawing on the right skill set for the right projects.

Companies can also facilitate flexibility—for changing team structures and new uses for an office space—in the way the workspace is organised and built. A solution, developed by Allford Hall Monaghan Morris dubbed "Project Jack", is a system of wall panels that can

be reconfigured within a day as company structures and team sizes evolve. Although it costs twice as much as a regular wall, "you only need to move the wall once and it's paid for itself! For people with 10-15 year leases, you might want to move a wall many times over, in which case it is paid for many times over." For an organisation, he says "the benefit is that your space is constantly responding to you. You're not being slowed down by construction and cost. You're able to reconfigure quickly." At the Massachusetts Institute of Technology, in offices for faculty, they are experimenting with demountable glass walls to temporarily create small meeting rooms.

Demarcating specific areas in an office building as shared spaces, with workstations meant to be used on a temporary basis, can provide a space to

house smaller project teams from various departments. Creative agency WPP uses its shared spaces to bring together such teams, as Mr Holliday explains: "If we want to put a project team together that involves taking people from various floors, then we've got those shared areas that can flex up and down, and can accommodate those requirements. But they are not designed to be permanent work stations for any individuals and departments in the building." A vision for the future, to facilitate office mobility, includes customisable workstations, as Peter Murray of New London Architecture describes: "You sit at your desk and it picks up your personal preferences from your iPhone or personal digital assistant and the light in the ceilings varies to suit your particular taste."

Conclusion

There are some powerful forces driving key changes in the nature of work, largely enabled by technology, from remote working to the need for digital skills. This has forced companies to rethink their approach to employees as well as office design. The new role for the office—to facilitate collaboration and foster creativity—has meant that companies are developing office spaces with large, open floors and areas for casual conversations for an exchange of ideas. Widely accepted is the need for a mixture of spaces from the open and informal to small meeting rooms and quiet work spaces. To spark creativity and improve the health and wellbeing of employees, there is an emphasis on biophilic design—mimicking the natural environment in terms of materials and light. The bottom line, however, is to empower employees to make a choice on where and how they want to work during the week.

However, flexible policies for working parents were limited according to our research. Offering flexible hours and remote working opportunities were cited as examples in most instances. But there is a reluctance to go further—to offer in-house creche facilities. Some companies do offer temporary creche facilities in case of emergencies, however, Mr Barnes of Jones Lang LaSalle explains that companies perceive that the legal risk associated with child care is too high to offer full-time child care services. But offering such services could go a long way in supporting working parents, particularly women, and improving productivity.

Further advances in technology, particularly in terms of AI, can result in yet another shift in working patterns. The future of work could see an increase in independent workers, all self-employed, working with multiple companies on a project basis. This could further transform the role of the workplace.

Companies and experts we interviewed expressed the importance of listening to employees in making decisions about office layout and design, a key ingredient for a firm to flourish, they say. Often, this may entail just getting the basics right. Tim Oldman, CEO of Leesman, a research firm, says that often it is just about “good telephone lines for call centres and good internet access for computer workers—it’s obvious, but that’s what people say makes the most difference.” Entire certifications, such as WiredScore, are dedicated to rating commercial real estate on the quality of its internet connectivity.

But whatever form the workspace may take, companies must strike a balance between meeting people’s demand for more flexibility and protecting their core values and identity. This includes having HR policies that complement the evolving nature of work and office design. But there is a role for office design too in defining company culture. Ms Sawbridge from Google believes that their offices, and particularly the new building planned at King’s Cross in London, are a testament to this: “It’s a real commitment to the philosophy behind Google. The office environment facilitates 10x thinking—we don’t like thinking incrementally, we want to build the best product that could possibly be designed.”

For buildings to capture corporate identity and stand the test of time therefore, Mr Allford says that offices of the future should mimic successful social spaces of the past. “In historical cities like Rome, it is amazing how creativity goes on even if a building is a thousand-year-old fixture, because it receives people who occupy them in different ways. So the office of the future to me is very much like the past and what we have to do is develop buildings that allow endless change and reinvention to occur in a positive way.”



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