

NLA | Expert Panel on Work

kks savills



23 October 2020

Issue #3

NLA Expert Panel on Work

Introduction

Context

NLA's Expert Panels brings together key industry leaders from across the NLA membership to provide thought leadership on design, development and construction in London and respond to new policies or consultations.

Groups are formed with individuals representing the public and private sectors across development, design, planning and construction in London.

Expert Panel on Work

This panel will focus specifically on future office space in London, looking at issues from space standards, to health and well-being, supply and demand, commuting and the future of office locations and typologies.

The first meeting, 17/7/20 focused on setting out key lines of enquiry to shape the agenda going forward.

The panel were invited to join sub-groups to take these topics further as agenda items for future sessions.

The Expert Panel on Work

- Katrina Kostic Samen, KKS Savills (Chair)
- Ben Adams, Ben Adams Architects
- Earle Arney, Arney Fender Katsalidis
- John Avery, LOM architecture and design
- Helen Causer, Argent LLP
- Ruth Duston, Primera
- Beth Kay, London Borough of Haringey
- Emma Lange, Derwent London
- Julie Lecoq, HOK London Studio
- Caroline Pontifex, KKS Savills
- Toni Riddiford, Stride Treglown
- Duncan Swinhoe, Gensler
- Steven Skinner, HB Reavis
- Alison Webb, Lendlease

Programme

Session #1: 13 July 2020 Full panel meeting

Sub Group Sessions September 2020

Session #2a: **Occupier Trends** - 16 September 2020 (16:00 - 17:00)

Session #2b: **Workplace Design Transformation** - 21 September 2020 (15:00- 16:00)

Session #2c: **Base Building Design Impact** - 23 September 2020 (11:00 - 12:00)

Group discussion in each session on the topics identified for each group.

Each sub-group to elect a spokesperson to report at the next full panel meeting.

Session #3: 19 October 2020 Full Panel Meeting (14:00 - 15:30)

NLA Expert Panel on Work

Sub Group Agendas

Occupier Trends

- Katrina Kostic Samen, KKS Savills (Chair)
- Alison Webb - Lendlease
- Beth Kay - London Borough of Haringay
- Emma Lang - Derwent London
- Helen Causer - Argent LLP
- Steven Skinner -HB Reavis
- Caroline Pontifex - KKS Savills

Session 2A: 16 September 2020 (16:00 - 17:00)

TOPICS FOR DISCUSSION:

What are the occupier's concerns and needs? The panellists agree key concerns are around staff's health and well-being; including choice and flexibility, travel behaviours, collaboration and sociability, and workplace experience. Brand embodiment and safeguarding culture is another central concern for occupiers.

Workplace Design Transformation

- Katrina Kostic Samen - KKS Savills (Chair)
- Ben Adams - Ben Adams Architects
- Earle Arney - Arney Fender Katsalidis
- John Avery - LOM architecture and design
- Julie Lecoq - HOK London Studio

Session 2B: 21 September 2020 (15:00- 16:00)

TOPICS FOR DISCUSSION:

What will be the intermediate and long-term changes to the workplace? Hyper-flexibility and variety of experiences will be central, and the industry could learn from the retail and hospitality sector. Diversity and inclusion will be key to ensure a human centred approach to the workplace, with mental health at the top of the agenda.

Base Building Design Impact

- Katrina Kostic Samen - KKS Savills (Chair)
- Toni Riddiford - Stride Treglown
- Duncan Swinhoe - Gensler
- Ruth Duston -Primera

Session 2C: 23 September 2020 (11:00 - 12:00)

TOPICS FOR DISCUSSION:

What will be the impact, post-covid, on base building specification and design? Will there be greater engagement between occupier and landlords? Intermediate and long-term changes that will create an ecology of the workplace with impacts on public realm, leisure and culture, well-being, climate change and investor sentiment. The importance of ESG to the value of an asset.

NLA Expert Panel on Work

Session #1 Summary 13 July 2020

The NLA Expert Panel on Work convened on 13th July 2020 for the first session with the objective to provide thought-leadership on the future design and delivery of office space for London.

The timing could not be better; Covid has unwittingly provided a once in a lifetime opportunity to 'get it right'. It has been long predicted that the future working environment will be driven by the employee's choice to achieve better balance and well-being in their working lives. Arguably, the pandemic has just accelerated the evolution in workspace design that would have occurred over the next few years, and people are likely to come out of this crisis wanting the ability to choose and with new resolve. This is the time to get it right - people are the heart of an organisation and its success; we must harness the advantages of working differently to create an environment to support business growth and create a resilient workforce.

Our panel experts are from a wide range of organisations in architecture, interior design, local government, development and public realm, all with a common focus: future workplace and occupier needs. NLA 'Work Panel' Chair Katrina Kostic Samen welcomed and thanked the panel, introducing three key questions that she wanted to explore.

What are key occupier concerns and what issues are clients asking about?

The panel all agreed on the vital role of the physical office, and much of the feedback has been around "when" not "if" we return to the workplace, although what that will look like is yet to be determined, we are only at the beginning.

The panel all agreed that safety and cleanliness is high on the agenda and that staff needs should be prioritised. The office will need to give people a reason to return and draw them back, and whilst that may sound somewhat broad-brush there is a further facet to be considered – attention to the individuals rather than a company-wide approach; there will not be a 'one size fits all' approach. Emma Lange, Derwent highlighted that different personalities have different needs. Many of the front facing teams at Derwent, typically extroverted, are back at work however what she queries what could be done to encourage more introverted staff to return to the office.

NLA Expert Panel on Work

Session #1 Summary | 13 July 2020

What do we think the changes to the design of the workplace will be in both the mid term and the future?

Unsurprisingly the consensus was that change would be broad but as yet unclear what it will look like. It is certainly time to seize the opportunity and create multi-layered, human centric, inclusive, enriched and curated environments with choice and variety, that are not just flexible but hyper-flexible.

80% of staff at Stride Treglown responded to a survey saying they would not choose to come to the office 5 days a week. Whilst agile working does enable people to achieve a better balance, it will also effect the size and shape of the workplace.

Inevitably this brings the question of co-working and suburban hubs into play. Co-working spaces have inevitably been impacted by the pandemic but what role can they play in the office of the future? To be further explored by the panel.

How will the wider architectural development and new build solutions respond to post Covid research?

In shared amenities, we have seen two immediate responses, the first positive, in requests for additional cycle spaces and the other, less welcome, for extra car parking. The sentiment is well understood however the positive impact that Covid has had on the environmental movement should not be eradicated.

Public realm should be considered as an extension of the office and occupiers be encouraged to be as creative with external space as they are with their future offices; public space and the ecology of the business district will factor in to the success of returning to offices.

There will be a challenge: two groups pulling in different directions – investors/tenants – long lease/short lease – future space will have to respond. How will local planning authorities respond to help shift the change in employees coming back to the office?

The panel were invited to consider further topics: example of cities that illustrate 'what good looks like'; what can this NLA 'Work' panel provide as unique in this discussion; and are there other relevant discussions / topics that should be considered.

NLA Expert Panel on Work

Session #2A Summary | 16 September 2020 | Occupier Trends

Attendees:

Katrina Kostic Samen - KKS Savills (Chair)
Emma Lang - Derwent London
Helen Causer - Argent LLP
Caroline Pontifex - KKS Savills
Alison Webb - Lendlease (post meeting feedback)

Apologies:

Beth Kay - London Borough of Haringay
Steven Skinner - HB Reavis

Topic: What are the occupier's concerns and needs? The panellists agree key concerns are around staff's health and well-being; including choice and flexibility, travel behaviours, collaboration and sociability, and workplace experience. Brand embodiment and safeguarding culture is another central concern for occupiers.

The discussion began with 'what do occupiers want (physical aspects)? How can the tenant/landlord relationship develop to assist this?

The panel discussed the physical aspects occupiers want, agreeing that health and safety measures were naturally a priority, but many talking about working towards climate targets of net zero carbon by 2030. Landlords will have to do more to help and support their tenants CSR drive. The panel suggested that perhaps a bespoke approach to each client may need to be adopted, and help them "be their own heroes", and reach their goals. The collaboration between tenant and landlord is critical. Furthermore it was highlighted that recent RFP's have focussed on these issues, from both a business and building perspective. This raised the question on who would pay for this increase in safety and environmental measures.

Though it is hard to quantify, it was highlighted that landlords who currently provide these measures along with quality amenities will attract tenants. Giving rise to the question "what is Grade A future specification? "it will have to provide everything".

Many are unclear still on the impact Covid has caused for businesses, however we do know, having been forced to adapt, that flexibility is key not just physically but mentally as well.

To enable our safe return to the workplace, refurbishment and repositioning of the office may necessary. It was agreed that these changes will be sector specific, as occupancy rates, productivity and dedicated working hours will differ between industries. Companies who have previously adopted agile working strategies have been well positioned.

Global asset managers, Schroder, said that having adopted agile working for their new premises, they "did not miss a beat" when lock-down came and have accelerated their plans by about twenty years. The group agreed that flexible working should be a given moving forward and avoid falling back into the 'old regime'.

NLA Expert Panel on Work

Session #2A Summary | 16 September 2020 | Occupier Trends

“What we would do without an office, what would we miss?” All agreed that it was primarily the social aspects, however, by turning the question around and asking what we would do without an office generated an interesting discussion. As we know flexibility and choice are key drivers for future workplace strategies, but by removing the choice to go to the office at all will create new issues.

There is a reason why cities have evolved to such an extent and the same logic can be applied to office spaces. Economy, proximity, socialising and access has made cities grow and the pace of city-life promotes drive, and context is important for inspiration, as Shoreditch has become creative sector. It was agreed by the panel that though inspiration and drive is often higher when a workforce is together in the office and processing is often better working remotely.

Critical factors for life without an office included the social impact for new starters and juniors, who would miss out on professional development and networking.

Discussion followed about the different personalities we have in the workplace - naturally diverse. Introverts have been happy to work from home and the challenge is now to entice them back to the workplace. The design of an office has to appeal and cater for introverts, extroverts and ambiverts (those that fall between the two well known profiles).

The extended use of virtual communication has had a further effect; it was agreed that introverts are able to retreat from the spotlight therefore often the virtual meeting do not reflect diversity of voice.

Travel patterns and behaviours are set to change. Interestingly, most occupiers who have come back, are to buildings where people can cycle easily. The Kings Cross scheme over provided cycle facilities and so are currently in a good-position for the increase in demand. The reluctance of some not to use public transport will result in increased pressure therefore landlords must look to review usability and experience of their existing facilities. Equally important will be the parking and amenities for visitors, potentially all of these should become front of house facilities

The consensus of the panel “it’s a very exciting time to be involved in real estate.”

The meeting closed with Katrina requesting a spokesperson to present on behalf on the sub-group at the next full panel meeting on 19 October. Proposed agenda, sub-group question and spokesperson are listed on Full Panel Meeting Agenda 19 October 2020 (page 12).

NLA Expert Panel on Work

Session #2B | 21 September 2020 | Workplace Transformation

Attendees:

Katrina Kostic Samen - KKS Savills (Chair)

Ben Adams - Ben Adams Architects

John Avery - LOM architecture and design

Julie Lecoq - HOK London Studio

Apologies:

Earle Arney - Arney Fender Katsalidis

Topic: What will be the intermediate and long-term changes to the workplace? Hyper-flexibility and variety of experiences will be central, and the industry could learn from the retail and hospitality sector. Diversity and inclusion will be key to ensure a human centred approach to the workplace, with mental health at the top of the agenda.

Katrina opened the meeting with the observation that the pendulum is swinging to more people working in the office and asked what others were seeing. Some clients are using this as a marker for making changes to their workplaces, but how will it be different is still the challenge. Clearly becoming paperless is a reality with the amount of 'essential' filing that was left behind and not touched for 6 months. Although some panellists were still remote working, it is agreed that for a creative business, working together is better. Some clients have brought staff back based on their job requirements leaving the remainder at home. One client, with a brand new fit out, is taking the time to revisit what they thought their workplace would be and now see it will be very different to what had been planned.

Does workplace design need to be transformed much like retail was five years ago?

As employers, the panel felt that they have gained greater understanding of their workforce and agreed that they will have to be enticed back to the workplace. There are stages we will have to go through, both pre-vaccine and post-vaccine.

Some clients are going through significant structural change which is making the return harder and there has been ongoing debate on the 'purpose' of the office.

We must learn lessons, we will not sit apart forever and there will be a vaccine. But we are going to find that the office as an anchor has diminished and the question is how to get that back. There are people who cannot work from home, either logistically or for mental health, which has potential for creating inequality in the workforce. The office needs to be more than just space, its environment and people. It should be more like a hotel, curated experience with a programme of events, where everyone feels safe and welcome.

But what about the employer? Productivity is important and we need to stay in business. It's a reminder that the office is a means of managing people, tool for getting the best out of them, people come first and you want to get the best out of them

NLA Expert Panel on Work

Session #2B | 21 September 2020 | Workplace Transformation

Are people better at home? Clearly there are distractions but happier so yes. How do you reach the introverts who might want to stay out of the office and get the best from everyone - there are people who will do an amazing job anywhere. Employers have to look hard at themselves and rewrite the rule book.

Getting people to the office is potentially more of an issue than the office itself, with people not wanting to take public transport. We are hearing of people wanting to move out of London but then there is a long commute to work even if it is not daily any longer. There does seem to be desire to stay in your neighbourhood or village, London or otherwise.

Will there be a reduction in space? There was a real knee jerk reaction from cost perspective initially and better optimisation will be essential. People should come in for what is needed and not forced to do so. In terms of attraction and retention, there may be a change in workforce expectations for flexibility.

The physical changes in the office do raise the question of how much office space we need in London. Amenities and the curated experience are important, to give people the chance to both occupy and belong. We now see the end of the desk factory office, with fixed PCs and people will value space, it will be more interesting and diverse.

Is agile working right? Should people be given their personal space, proportionally smaller that they can customise to suit their needs.

Sanitisation and hygiene will clearly be essential and cleaning protocols will change and materials will be selected based on cleaning and maintenance.

Well-being has been viewed as a problem to solve in the past but it can be turned on its head and make the office a place where this can be supported and provide sanctuary and respite spaces which have colour, texture, art and biophilia.

What one thing could employers do before staff come back? Remove half the desks and replace with other, possibly more domestic, furniture. Partly to provide the essence of what people had at home but also, people really do not want to be sitting at a desk all day.

This will enable spaces to be created where people can get together safely and comfortably. Experiment, do not be too precious and see what works over time, simpler things will make a difference after the collective experience we have all had. The greatest luxury is space.

If landlords and developments provide enhanced amenities this potentially disadvantages the high street and should the goal be to provide all amenities in their buildings. Perhaps landlords should view their portfolios like a campus and distribute amenities across a number of sites, perhaps ventures with service providers to create a new amenity ecosystem and operating model.

The meeting closed with Katrina requesting a spokesperson to present on behalf of the sub-group at the next full panel meeting on 19 October. Proposed agenda, sub-group question and spokesperson are listed on Full Panel Meeting Agenda 19 October 2020 (page 12).

NLA Expert Panel on Work

Session #2C | 23 September 2020 | Base Building Design Impacts

Attendees:

Katrina Kostic Samen - KKS Savills (Chair)

Toni Riddiford - Stride Treglown

Duncan Swinhoe - Managing Principal, Gensler

Apologies:

Ruth Duston - Managing Director, Primera

Topic: What will be the impact, post-Covid, on base building specification and design? Will there be greater engagement between occupier and landlords? Intermediate and long-term changes that will create an ecology of the workplace with impacts on public realm, leisure and culture, well-being, climate change and investor sentiment. The importance of ESG to the value of an asset.

Looking forward, systems and specifications are under scrutiny. As established in the previous panels, there is a need for a greater relationship between building, occupiers and landlord, and in relation to this how far can base build go to accommodate new needs?

People are moving away from high velocity systems to lower velocity systems as there is a clear connection to the spread of the virus - higher velocity push air from person to person. Central systems within sealed buildings are now seen as problematic, and people's perceptions of a healthy environment are changing. In addition to this questions are changing the typology of the office, for example preferences are switching to spaces with operable windows. The question was raised about responsibilities changing between tenant and landlords in terms of control, maintenance and servicing - will the tenant want to take on more to ensure safety of their staff; will the landlord want to mitigate their risk?

Location is a key factor that will likely be impacted in the long-term. London postcodes for Grade A commercial offices were very important 20 years ago, more prevalent to Zone 1, but now a much higher factor for people is location in relation to transport. This has arguably always been the case but more recently this includes the specifics of avoiding the tube, with preference to walking and cycling. London traffic is up by 10% in September since March (before lock down) likely in response to using mass transit, perhaps we will see micro communities - 'the 15 minute city'.

The panel agreed that the regional impact on location has already been noticed, with a higher proportion of staff returning to their workplaces than in city centres.

The role of the office was again debated, confirming the social aspects as a central to encourage employees back. The impact of Covid has accelerated the potential to give commercial offices a new 'lease of life', as employees realise the office provides a place for their working community to gather.

NLA Expert Panel on Work

Session #2C

The hybrid/dual working model has been put into action since March, giving people choice and flexibility. This allows them to work at home for 'desk' related tasks, and use the office to gather (this panel debate was prior to the change in government guidelines in September 20). This has a knock on effect with base building dimensions, as the volume of a space comes into question – what are those dimensions needed to enable large gatherings/ collaboration? Further questions were asked about the surrounding space between buildings if the foot print of the base building was to grow.

If occupiers have safety concerns about working in a sealed space, the panel discussed that perhaps the future could involve outdoor workspaces. Could winter gardens be the connectors/public spaces, leaving the area between buildings to be used for the outdoor office? By mitigating wind chill and sun, temperate environments can be created, undoubtedly, in the short to mid-term at least, a preferred option. Berlin has done this so watching results there could inform us.

"The pendulum has not swung all the way across" was a term used to describe the ever changing definition of work, accelerated by Covid.

To date, the panel agreed that task based work is easy to pair with a specific environment, but cultural and community aspects of the office are yet to be recognised/re-imagined. There is a need for surveys released at the beginning of lock down to be repeated now, as over time opinions swing back and forth back in favour of the office.

The different elements of the city come into play, providing the 'real cultural glue that makes things work'. It isn't just about the physical meeting anymore, it is about what an individual can do outside this meeting, such as meet friends and enjoy the neighbouring cultural adjacencies.

In terms of the impacts concerning the 'bricks and mortar' of base build, the response focused on the big question mark over knocking down older buildings to replace with new schemes; in these climate change conscious times, it isn't responsible.

The mind-set of reuse and adapt is key. In London, assets should be considered for re-purpose, which has benefits of reduced risk in terms of planning.

The biggest challenge for landlords is not the building specification but the service they offer, outside the tenant demise - those who cannot provide the factors discussed previously will become less desirable. Looking to the future, the workplace is moving from fixed desks to a more community/-centred and collaborative experience. Perhaps before when we considered work/life balance we viewed the two as separate things. But now, we view work as a necessary platform/aid for socialising and being a part of a community. There will be a new appreciation for the office!

The meeting closed with Katrina requesting a spokesperson to present on behalf on the sub-group at the next full panel meeting on 19 October. Proposed agenda, sub-group question and spokesperson are listed on Full Panel Meeting Agenda 19 October 2020 (page 12).

NLA Expert Panel on Work

Session #3 Full Panel 19 October 2020 | Agenda | 14:00 - 15:30

	Agenda	Lead / Spokesperson	Topic	Group Question
14:00	Welcome from the chair	Katrina Kostic Samen Head of Workplace Strategy & Design KKS Savills		
14:05	Group 1 Occupier Trends	Helen Causer Office and Investment Lead (King's Cross) Argent LLP	Topic: Occupier concerns and needs: health, well-being; choice, travel, socialising, workplace experience, brand and culture.	"What would happen if we lost the office permanently? What would be the impact of losing this environment?"
14:25	Group 2 Workplace Transformation	Ben Adams Founding Director Ben Adams Architects	Topic: Intermediate and long-term changes to interior fit out in response to covid virus. Designing for diversity and inclusion.	"What is the workplace of the future? Is it revolution or evolution"
14:45	Group 3 Base Build Design Impact	Toni Riddiford Associate Architect Stride Treglown	Topic: Post-covid impact on base building specification and design in the built environment. Public realm, leisure, climate change/ESG, well-being and master-planning.	"If the workforce are driving commercial office specification, what will the built environment look like to support people returning to the office?"
15:05	Discussion			
	NLA Research Synopsis Introduction	Federico Ortiz, Programme Manager, NLA	NLA to present 'Workplace Revolution', an NLA research paper to be launched in May 2021	
15:10	NLA Annual Programme		Group to discuss key questions which should drive the focus for the NLA Work programme in order to develop and answer those questions up until the research launches. Group invited to also suggest useful resources for the research	
15:25	Final comments from the chair and next steps			
15:30	End	Katrina Kostic Samen		

NLA Expert Panel on Work

Session #3 Full Panel 19 October 2020 | 14:00 - 15:30



Katrina Kostic Samen
KKS Savills (Chair)



Alison Webb
Lendlease



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Ben Adams Architects



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Emma Lange
Derwent London



Helen Causer
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John Avery
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Julie Lecoq
HOK London Studio



Ruth Duston
Primera



Steven Skinner
HB Reavis



Tim Hyman
Derwent London



Toni Riddiford
Stride Treglown

NLA Expert Panel on Work

Session #3 Full Panel 19 October 2020 | Group 1

Occupier Trends

- Katrina Kostic Samen, KKS Savills (Chair)
- Alison Webb - Lendlease
- Beth Kay - London Borough of Haringay
- Tim Hyman - Derwent London
- Helen Causer - Argent LLP
- Steven Skinner - HB Reavis
- Caroline Pontifex - KKS Savills



Presentation Summary | Helen Causer

**“What would happen if we lost the office permanently?
What would be the impact of losing this environment?”**

2020 has clearly been an extraordinary year for the workplace. Office usage became front page fodder and the ‘death of the office’ widely proclaimed by the media.

We are possibly in the midst of the greatest and most rapid change to the way we work that we have ever seen. But what are the short, medium and long term impacts of this? One thing is clear across our experience the disappearance of the office is not the likely end game of the pandemic, although it will almost undoubtedly change. The consensus between us is that largely occupiers are not yet clear on what this change means for them.

The sub panel shared valuable coalface observations; insight from our own organisations, from our customers and from the wider occupational market.

In addressing the first question we have principally focused on the physical impact and for the second more of the emotional effect.

We have not addressed the wider impact of business districts or those businesses that rely on the office occupation of others.

- **What would happen if we lost the office permanently?**

Where would we work: Home / office / other? We have seen an increasing focus on a task-based approach to working/workplace. Clearly there are some tasks that can be done effectively from home but others that are not. If you cannot work in an office, where do you come together to collaborate, build relationships or develop talent?

Residential building design: If the office was lost, the home would need to respond to fill the void. For many people the home is not a long term option as it is not conducive to effective or productive working. Where will the boundary be between work and the rest of your life. We are already overly connected resulting in a diminishing ability to focus properly.

Evolution of third spaces: Acknowledging that, for many, the home environment is not suitable for full-time working, either from a structural or emotional perspective, third spaces will need to evolve. What these are will be driven by the needs of people, which will all be very different. This presents opportunities to re-purpose space (such as high street retail) to meet some of this new demand.

NLA Expert Panel on Work

Session #3 Full Panel 19 October 2020 | Group 1

Digital versus physical interaction: The panel widely felt need to balance endless virtual meetings with physical interaction. This has been a good test to see when travel is critical, it has had a positive environmental impact but equally has highlighted the occasions where meeting in person is vital. We see that people are really craving less digital and more physical interaction.

Decentralisation: How do we quantify and replicate the value of cities? Centres of population have long been a hub of learning and innovation, a mixing pot of cultures and a hub for the arts which enrich the lives of those who pass through them. This is a loss of cultural influence will impact on creative thinking and (for many) life quality.

Benefits: No more office fruit, subsidised meals or company gyms? These benefits are more than simple perks. The infamous 'Google stone' (weight gained from the free food provided by the company) may have disappeared but businesses will need to reflect on how they can provide the right employee experience, attract talent and maintain productivity through virtual programmes for learning and wellbeing.

What would be the impact of losing this environment?

Company brand and culture: Offices are increasingly the embodiment of the corporate brand. Loss of corporate culture was cited as a driver to pull Yahoo and IBM back to the physical workspace earlier this century. These examples highlight the challenges in maintaining corporate culture without a physical place for people to come together. Critically it also makes it hard to feel connected to the business itself, and aligned to its mission and purpose which is an increasingly important part of work-life for millennials and Gen-Z.

Relationships and community: We have seen primary networks strengthened but secondary, tertiary networks weakened. The process of forming new relationships will need to adapt.

Spontaneity and serendipity: The classic 'water cooler' moment. Spaces, virtually or physically, are needed to support the chance encounter that prompts the cross pollination of ideas and sparks new relationships.

Professional development and training: Surveys show that learning is being increasingly impacted as a result of prolonged home working. Whilst formal training can be held virtually, the real loss is around the informal and passive learning.

Diversity of thought: Recognising and responding to different personality types to protect against group think. Differently types of people naturally gravitate to different working environments but how can we bring these people together to ensure decision making is strengthened by diversity?

Talent: We know that young people have been disproportionately disadvantaged by the pandemic in many ways. Millennials and Gen-Z have generally suffered most from challenging home environments and are most negatively impacted by not being in the office in terms of learning and professional growth. Those more advanced in their careers are drawing on networks and relationships built over years of physical interaction.

We have all seen how difficult it has been for new joiners to connect and have meaningful relationships with colleagues during Covid. Those not able to form these networks will feel the impact in years to come.

Pastoral care: Physical and mental health go hand in hand with the pandemic. Loneliness for example was classed as an epidemic in the UK pre-pandemic, and is likely to have worsened as the need for rewarding social contact or relationships is not met.

NLA Expert Panel on Work

Session #3 Full Panel 19 October 2020 | Group 1

We unanimously agreed that the office is not dead. The office will remain a critical driver of culture, learning and personal connections. Businesses will inevitably consider their occupational strategies - how much, and what kind of space they need, how do they recruit and retain the best talent and where do those people want to work. They will need to consider how to take care of their virtual workforce, protect employee experience, company culture and support transition back to the physical workplace.

The drivers for employees to return to the workplace will increasingly be the sense of wellbeing, learning and feeling connected. That said, Covid has created the expectation of choice at employee level as to how, when and where they can work.

What are the opportunities to respond to this?

Employee choice: A shift in attitudes on flexibility and remote working. Enhanced remote/flexible workplace policies will balance home, office and third spaces. A few results of this we are seeing already is more consideration a flexible footprint; hub-and-spoke models and an increased investment in suburban and regional office locations to reduce commutes. Equally we expect to see a continued flight to quality in terms of office location and specification with a divergence between prime and secondary. Also a desire to locate at knowledge and transport hubs.

Renewed purpose: Questioning of what the function of the office is? The race for density appears to be over as the purpose of the workplace shifts. Importance of the workplace in making connections, learning and wellbeing will be amplified with the evolution of environments to support these uses.

Increased focus on workplace experience: In the short term the focus on hygiene and wellness is already playing out as workplaces embrace bio-security - no-touch surfaces, density and distancing, cleaning and maintenance, and the importance of outdoors and nature. The experience required to attract employees back to the workplace will become increasingly important, it must add value and provide enrichment.

Diversity and inclusion: Enhanced remote and flexible working provide excellent opportunities to recruit and support a more diverse workforce.

Evolution of the landlord and tenant relationship: Moving towards a partnership approach, recognising the employee as the customer and decision maker and responding to their needs. Enhanced and diversified service models: real estate plus.

Technology adoption and digital transformation: This has been a winner from necessity, and this will open doors to greater transformation opportunities as we return to a new normal. But concerns around personal monitoring, cyber security and data management will all escalate in tandem.

Physical and mental health: Covid has caused a physical and mental health crisis. This is an opportunity for businesses to focus on how they can support their workforce as the implications of this continue materialise. As mental health challenges grow, consideration must be given to how can the physical and virtual workplace support wellbeing, and resulting performance, of employees.

Sustainability and community: One example is the rallying around local communities and making stronger local connections. There is great opportunity for this to translate to the future office.

Share economy, shared amenity and flexible workspace: The concept of sharing spaces as individuals or businesses is less appealing in the short term but this provides opportunities to respond to changing working patterns in the medium to long term.

In summary, the honeymoon period of home working has now passed, and the longer-term impacts of this extraordinary period are being felt. It has now dawned on many that working from home is the same as living at work.

NLA Expert Panel on Work

Session #3 Full Panel 19 October 2020 | Group 2

Workplace Design Transformation

- Katrina Kostic Samen - KKS Savills (Chair)
- Ben Adams - Ben Adams Architects
- Earle Arney - Arney Fender Katsalidis
- John Avery - LOM architecture and design
- Julie Lecoq - HOK London Studio



Presentation Summary | Ben Adams

Workplace of the future - revolution or evolution?

Workplace trends were already evolving rapidly, but exacerbated by the effects of the Covid pandemic, is there a bigger revolution now taking place.

We are working remotely at an unprecedented scale right now. This is not likely to last forever, with people starting to return to physical office spaces over the coming months. But the impact on office design will be lasting. The office will never be the same again.

Office design will undergo the kind of transformation that the retail sector experienced around five years ago in order to drive footfall - spaces will have to be fun, engaging, social and collaborative. This will bring challenges for employers and designers.

Design to combat Covid has introduced a number of temporary interventions - 2m distancing, 1 person per lift, etc - but longer-term, employees are going to want environments that are reassuring and domestic, as a relief to the harsh clinical realities being experienced now.

There will be a desire for a more domestic scale of comfort in the workplaces, where people can feel 'at home'.

Employees will demand more bespoke ways of working to tempt them back into the office. And office design will need to reflect that from staggered working hours to the fact that not everybody will be physically together at any given time. Video and conferencing facilities will need to improve.

The culture of space will change, with a greater alignment between organisations and the spaces that they operate in, balancing group and individual requirements and becoming more diverse.

Employee demands are very much in focus now, but what about the needs of employers? How are these changes affecting the productivity necessary for organisations to thrive in challenging times?

Working from home can help facilitate greater productivity, with reduced commuting times and more relaxed staff, but can also be highly distracting as people juggle conflicting life/work priorities. Remote working places greater pressure on office culture and the ability to 'reach' all staff.

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How do employers get the best out of their people, including introverts, and how can design help? There are new HR challenges to keep people focused and retain/attract the best talent.

The immediate physical impacts of Covid-control on the environment - the ability to clean, sanitise etc. may have a lasting influence on the choice of materials in the future, from furniture to all surfaces.

The city centre will not die but it is likely to get smaller and there will be significant change in the way spaces are used. Companies will use their offices more as a club, a destination, a place to be. Hospitality models will be referenced to create more diverse, interesting and creative work spaces.

Flexible and agile spaces: The provision of large, collaborative, flexible spaces has been a massive influence on office design on recent years, providing staff with greater amenities. But how much office space will London need over the next 2 years?

If physical offices start to develop towards more of a membership structure to tempt people back, offering things like a cinema, gym, bar, bike shop will be key. Organisation may take the same amount of space but use it differently to support this trend.

If offices become 'hospitality hubs' how will this affect the relationship between work and retail? Great Estates, BIDs and landowners will increasingly think of a building as part of an estate, or part of a collection of buildings which could support a larger ecosystem of employees.

Commuting: Nervousness about commuting may start to affect house prices, as people decide whether to move more centrally or whether to desert the city centre altogether. A move towards cycling may need to be supported by more employer travel schemes.

A daily 30 - 40 minute commute for people is still then most likely scenario. A people choose to work closer to home, London may become a city of villages again, as LA has done.

What do organisations want from office design right now? Variety, diversity and inclusion. Different spaces, open spaces, smaller spaces, creating different zones. Make space. Take out desks, bring in domestic furniture (sofas, rugs, etc). Little interventions that could help with communication and interaction, e.g. writable walls or surfaces.

What will be missed if we don't have an office? It might seem an old fashioned or traditional perspective but people might want to hold on to personal allocated space.

Maybe this is an evolution rather than a revolution.

NLA Expert Panel on Work

Session #3 Full Panel 19 October 2020 | Group 3

Base Building Design Impact

- Katrina Kostic Samen - KKS Savills (Chair)
- Toni Riddiford - Stride Treglown
- Duncan Swinhoe - Gensler
- Ruth Duston - Primera



Presentation Summary | Toni Riddiford

Covid-19 has put the workforce well and truly in the driving seat. How do communities, developers and landlords respond and what are the enduring effects on the built environment and the commercial office base build specification?

With the country, as a whole now, in the midst of a second phase of lockdowns, the lasting impacts of the overnight Covid-19 home working experiment remain in flux. Early signs when restrictions were eased in late summer suggested that London wouldn't immediately bounce back to its previous norm and would be one of the hardest impacted, with less workers returning to the centre than other regional cities. Cited reasons for this include more jobs with opportunity and desire for home working and safety concerns around the commute supplementing new found time and cost savings.

Despite this, there remains long term confidence in the future viability of the 'office' as a physical entity, contributor to city life and investment opportunity, albeit in a very different form based around a hybrid model of working, rather than the traditional Monday-Friday, 9-5 with the focus on presenteeism.

Covid-19 has given individuals time and space to reflect upon how they want to live their lives, raised their expectations of their employers and forced organisations to rethink the way they manage and support their workforce. The key will be understanding and adapting to the changing role of the workplace within the London eco-system, on a borough-wide, area by area and building by building basis.

'Good' will no longer be good enough. Local areas will need to work harder than ever to encourage working populations to them in order to benefit from the economic and social vitality their presence brings. Landlords will need to do more to make their buildings attractive and enticing to occupiers.

Location will be a key differentiator. This won't just be focused on the priorities of old, postcodes and proximity to mass transit hubs but also the minimisation of connection points and the availability of active and alternative modes of transport. It will also extend to the environment around the office.

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If our attendance at 'work' in a physical sense is no longer the default but becomes reason driven then the surrounding built environment could be considered more important than the workspace itself.

And it's the peripheral activities to 'working' that support the city to function; morning coffees, working lunches, after work drinks with friends, industry and social events. Leisure and cultural activities create vibrancy, support local economy, contextualise 'work' and give us reasons for being there in a physical sense.

Mono-functional locations are likely to be challenged and BIDs and a partnership approach between private and public sectors will be needed to identify strengths, address weaknesses and implement tangible changes that respond to immediate impacts and support longer term evolution.

Equally, less established but well connected, serviced office markets might become more desirable and as some of the established ground floor occupiers fall away; there are opportunities to bring life back into city streets in different ways. These opportunities will need to be backed up by modernisation and flexibility in planning and licensing policy, which is otherwise in danger of getting stuck behind the times.

There will also need to be more collaboration between building owners, managers and occupiers and every building will be expected to 'add value' to the organisation(s) it houses, whether that is through the connectivity, liveability or culture of its location, the community it fosters or the brand values it promotes.

Locations and individual buildings will need to identify and strengthen their USPs.

This sits hand in hand with ESG, which continues to be increasingly important to the value of an asset but is unfortunately more challenging to deliver in existing building stock and investments focussed on quicker returns.

When it comes to the technicalities of base build specification, flexibility will be the name of the game, with occupiers yet unsure what their short and medium term needs are, let alone their long term ones.

M&E system design will inevitably focus on air quality and infection prevention but occupier perceptions will also play a key part in base build design. Natural ventilation, light, volume, active circulation and a relationship to the outside all add to the perception and delivery of a 'healthy environment', which means sealed, high-rise space might initially struggle.

Square metres per person and ratio of workstations will become an outdated method of defining needs and requirements. The opportunity to challenge densities and the scale of provision of typical base build items, that often get stripped out at fit out anyway, may even unlock commercial benefits for developers, although flexibility to incorporate bespoke occupier arrangements is likely to be increasingly expected.

Occupiers will instead be judging buildings and spaces on how they support the cultural, community, collaboration, creative and knowledge sharing aspects of their business and whether they offer a selling point in the war for talent. How much of this is self-contained within their demise or offered by the design and curation of the location and base build facilities will be a consideration.

We expect a sustained loosening of the 'standard' base build specification and inevitably, lots of trial and error but from rapid change and vast unknowns results liberation and opportunity for innovation.



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