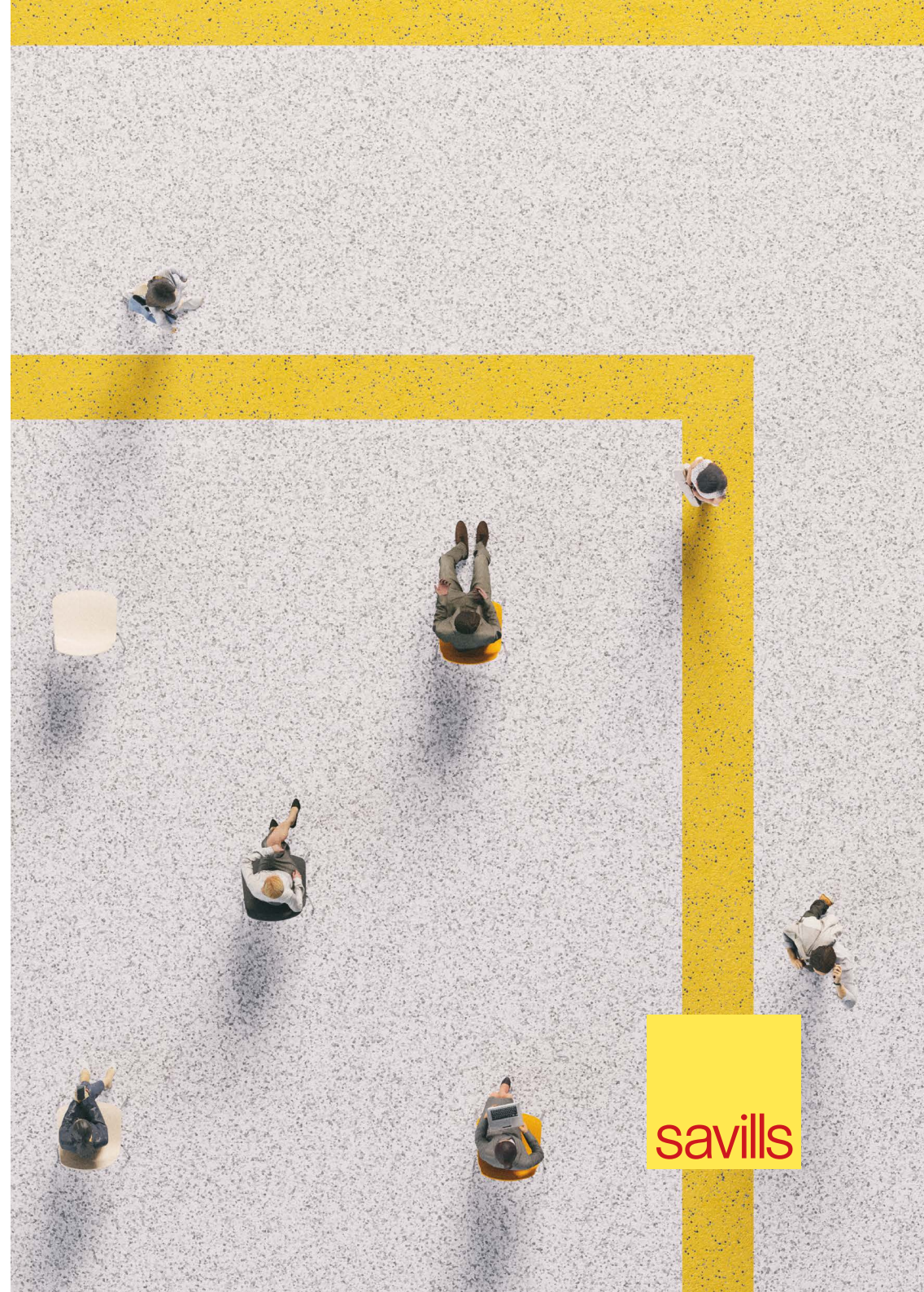


GLOBAL OCCUPIER INSIGHTS

The immediate and longer term
impacts of Covid-19 on the workplace

SAVILLS
OFFICE FiT

Adapt, Evolve, Improve



What is OFFICE FiT?

Savills Office FiT has been launched in response to the Covid-19 pandemic. It provides clients with practical, strategic and design-led advice and insights from our global experts.

The campaign will provide shared learning and the development of new strategies as owners and occupiers adapt, evolve and improve the workplace.

With employee wellbeing at the heart of any workplace strategy, we need to be quick to adapt our existing space to make it safe to return to the office and consider longer term changes to deal with the 'new normal.'

Longer term impacts on the demand, function and design of offices will be analysed and commented on in the results of our Office FiT survey.

This paper summarises the key considerations that occupiers should take into account and will be followed up with practical, strategic and design led advice based on global shared learning.

OUR KEY THEMES:

Adapting to a new way of working

Who needs to be in the office and why?

Complying with new regulations

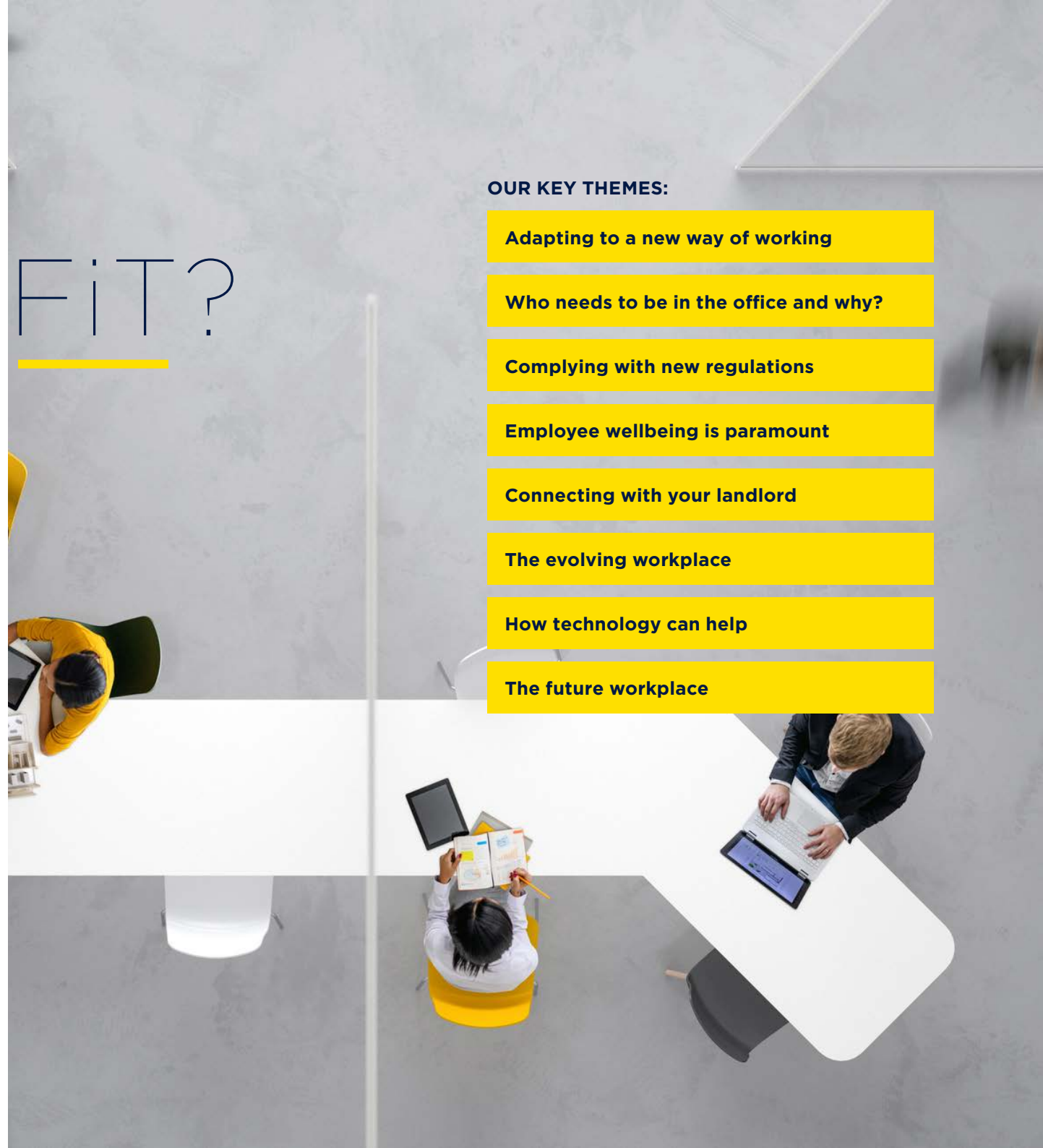
Employee wellbeing is paramount

Connecting with your landlord

The evolving workplace

How technology can help

The future workplace



ADAPTING TO A NEW WAY OF WORKING

Businesses will need to be adaptive and flexible in their return to the workplace

Decades of alternative and flexible work strategies, from desk sharing to working from home and serviced office accommodation, have provided global occupiers with a myriad of ways in which to optimise their workforce, unleash creativity and collaboration.

The Covid-19 pandemic has challenged accepted assumptions about the nature of work, how it is managed and delivered and how businesses and their employees function.

Indeed, the very idea of the workplace being a fixed physical location and the natural gravitational centre of business activity is under question for some organisations. Restricted commuter capacity and employee anxieties are giving rise to short-term location strategies that may see longer-term decentralisation.

Return to the office plans must be bespoke and local - there is no universal blueprint and strategies should reflect the impact on us as individuals as well as the company as a whole





Who needs to be in the office **AND WHY?**

Whilst some geographies are in the grip of lockdowns, mobility restrictions and social distancing, others are emerging through the other side with life and business activity cautiously returning to something like a 'new normal'.

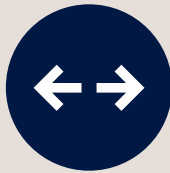
Organisations must develop adaptive strategies that respond to new challenges including the possibility of future restrictions to our mobility and working practices. Getting back to the office won't be easy and indeed when considering how to tackle this one of the first questions that businesses will ask themselves is 'who needs to be in the office and why?'

The role of the office long-term is vital to provide cultural reinforcement, connections and collaborations that will be even more essential after the emotional and physical impact of the pandemic.

As restrictions begin to lift, many businesses will take a staged approach to returning to the workplace

COMPLYING WITH NEW REGULATIONS

Globally government regulations are not consistent and changing regularly. They are under increasing pressure to balance health risks and economic impact in their regulatory guidance on a controlled exit from lockdown. For more information regarding Dutch regulations, please visit the [government website](#) of the Netherlands.



Social distancing guidelines

Likely to remain the key regulatory defence strategy, with consequential limitations to capacity giving rise to rotational and shift-working patterns.



Stay at home policies

Still mandatory in certain countries while others are leaving it up to employer discretion, who may encourage semi or more permanent work-from-home policies for some back office roles.



Personal protective equipment

Adequate and resilient supplies and guidance on use will be critical.



Restricted Industries

Restricting activity based on sector or industry has been a feature of government policy initiatives around the globe. Returning to offices is likely to be phased after non-food retailers, factories and warehouses, depending on government policy initiatives.



Flexible people not just flexible workplace

The fluid and complex nature of the health challenges and government policy responses adopted around the globe has meant both people and workplaces need to be flexible.



Schools and Public Services

Provision of public services, including schools, has been disrupted and creates additional demands on employees that will need to be accommodated in any return-to-workplace planning.

Employee wellbeing is PARAMOUNT

Wellbeing and mental health

Employees will need to feel comfortable that their daily commute can be completed safely and will not place them and their loved ones at increased risk of exposure to the virus. Employee wellbeing and mental health is paramount and a precondition for ensuring a happy and productive workplace in current circumstances.

Commuting and public transport

Travel via public transport systems will rely upon regulatory and public health advice. Reduced peak time capacity will extend office working hours.

Vertical circulation

Strategies around the use of lifts are fundamental and must take into consideration the management of high-touch areas, increased cleaning, social distancing and management to achieve optimum capacity.

A safe working environment

Regular deep-cleaning of the work premises has become a fundamental health and safety consideration for businesses and is one of the more visible ways in which a company can demonstrate their commitment to providing staff with a safe working environment.

Amenities

Surrounding amenities and building facilities which may have been important in the selection of office premises, may now be closed or in limited operation. Consideration may need to be given to the provision of some amenities such as pre-packaged food and drink, to avoid increased risks from employees exiting and re-entering the building numerous times.

Communication is key

Constant communication and updates to the workforce will be key throughout. These will need to be across the business but more specifically on a country-by-country basis. With 'stay at home' guidelines remaining in place for those deemed at higher risk, it will be important that the whole workforce remains connected to their teams and that opportunities for remote staff to work together on team based or collaborative work projects are created and managed.

The personal, anthropological and behavioural effects of the pandemic need focal consideration as we seek to recover. Mobility, in particular public transport, remains a constraint as employees must firstly feel comfortable about their commute.



CONNECTING WITH YOUR LANDLORD

Effective communication and alignment of planning between landlords and occupiers is critical, particularly in managing high traffic shared areas within buildings and their public realm.

Some typical questions we are seeing from landlords:

What is the strategic plan for occupancy? What might be the staggered start times?

What percentage of occupancy levels are planned and over what timeframe?

Is there a need for a phased introduction of catering?

Any restrictions on client / visitor meetings being imposed?

What are the new requirements for cleaning and security regimes?

Any requirements for the provision of Personal Protective Equipment (PPE)?

What are the likely methods of transportation to the building (i.e. cycles, cars, pedestrian, public transport, etc)?

What are the processes for communicating any cases of infection within your business and with building management?

Some practical requests from occupiers for landlords:

Increased air exchange and improved filtration systems

Humidity increase after hours to reduce transmission

Apply visual screens at reception desks and security hatches

Enhanced provisions for bicycles and storage

Improved building communication with specific sign posting to keep staff informed

Clear strategies in place for managing visitors and guests to the building

Staggered working hours in multi-tenant buildings to facilitate extended core hours of building operation

Managing lift numbers - with strategies around the use of lifts and vertical circulation

THE EVOLVING WORKPLACE

Companies will need to offer enhanced health and safety and address specific challenges created by the risk of Covid-19 infection, as they rethink the future of the workplace

Site-by-site risk assessments and consultation with health professionals on practical precautions will inform the development of 'best practice' standards for use across workplaces.

Staff engagement through surveys, information forums and 'town halls' will provide the opportunity to evolve policies and procedures ensuring that employees' genuine concerns regarding safety are being heard and responded to.

Owners and occupiers are likely to look with renewed interest on the merits of building ratings schemes such as LEED and WELL that are focused on delivering sustainable spaces and improved occupant comfort, health and wellbeing.

Flexible working and commuting patterns adopted by the workforce at scale may drive longer term changes with positive impacts for energy consumption and air pollution.

Immediate considerations:



Maintain the flexibility to work from home



Temporarily cancel or restrict common areas



Restrict face-to-face meetings



Move towards frictionless entry



Clean desk policy



Reposition workstations



Stagger working hours



Improved / more regular cleaning regimes



Employee pack to include: hand sanitiser, gloves, daily mask, etc



De-densify workstations (dependent on local regulations and any limitations on existing infrastructure)

There are opportunities to make business operations more resilient and deliver enhanced sustainability

HOW TECHNOLOGY CAN HELP

Portable technologies and business systems that support our mobile working have been utilised by the global workforce on a scale never seen before and the possible implications of this on the future of how and where we work are profound.

Business systems and processes to manage workflows and staff productivity during the Covid-19 crisis may persist and become adopted post the pandemic as mainstream management approaches.

Subject to privacy regulations, we might expect businesses to explore the further deployment of technologies that allow for more effective monitoring of employee access, movements and activities within a workspace.

Social media platforms and online collaboration tools have arguably never been of greater importance to businesses to facilitate connection, communication and community among staff, colleagues, customers and clients.

Smartly managed and moderated, these tools create the genuine opportunity for company and business cultures to be extended from the physical workplace into the digital realm.

We might expect businesses to explore the further deployment of technologies that allow for more effective monitoring of employee access, movements and activities within a workspace



The future WORKPLACE

Organisations will adapt to ongoing restrictions and develop adaptive strategies to evolve to new challenges including the possibility of future lockdown.

Workplace change has been happening, but the pandemic has undoubtedly accelerated this and will give rise to longer term impacts and improvements.

Using technology it is likely that a hybrid model will develop around the head office, local hub offices and home working. There is a big opportunity to improve sustainability, employee wellbeing and organisational resilience.

We will be analysing the results of our survey on how Covid-19 has changed people's working preferences, and together with other insights and trends from our global experts, we will be producing a range of resources and guidance on the future of the workplace.



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