

Future of Work

Where ambition thrives

Driving Corporate

Real Estate Change



Macro-environment



Fourth Industrial Revolution:
technology-driven disruption



Changing workplace
demographics



Integration of
business services



M&A shifting the
competitive landscape

The Future is Now



- The **4th Industrial Revolution** is a fusion of technologies that is blurring the lines between the physical, digital, and biological spheres.

Klaus Schwab,

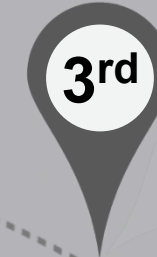
Founder and Executive Chairman of the World Economic Forum

Now &
Future



The
**Augmented
Age**

1980s -
present



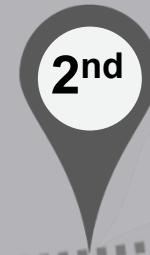
Analog → Digital

18th – 19th
centuries



Agrarian → Steam-
powered

1870 –
1914



Steam-
powered → Electric-
powered

World Economic Forum, 2016

Data is the new oil



Largest S&P 500 Companies By market capitalization, billion US\$

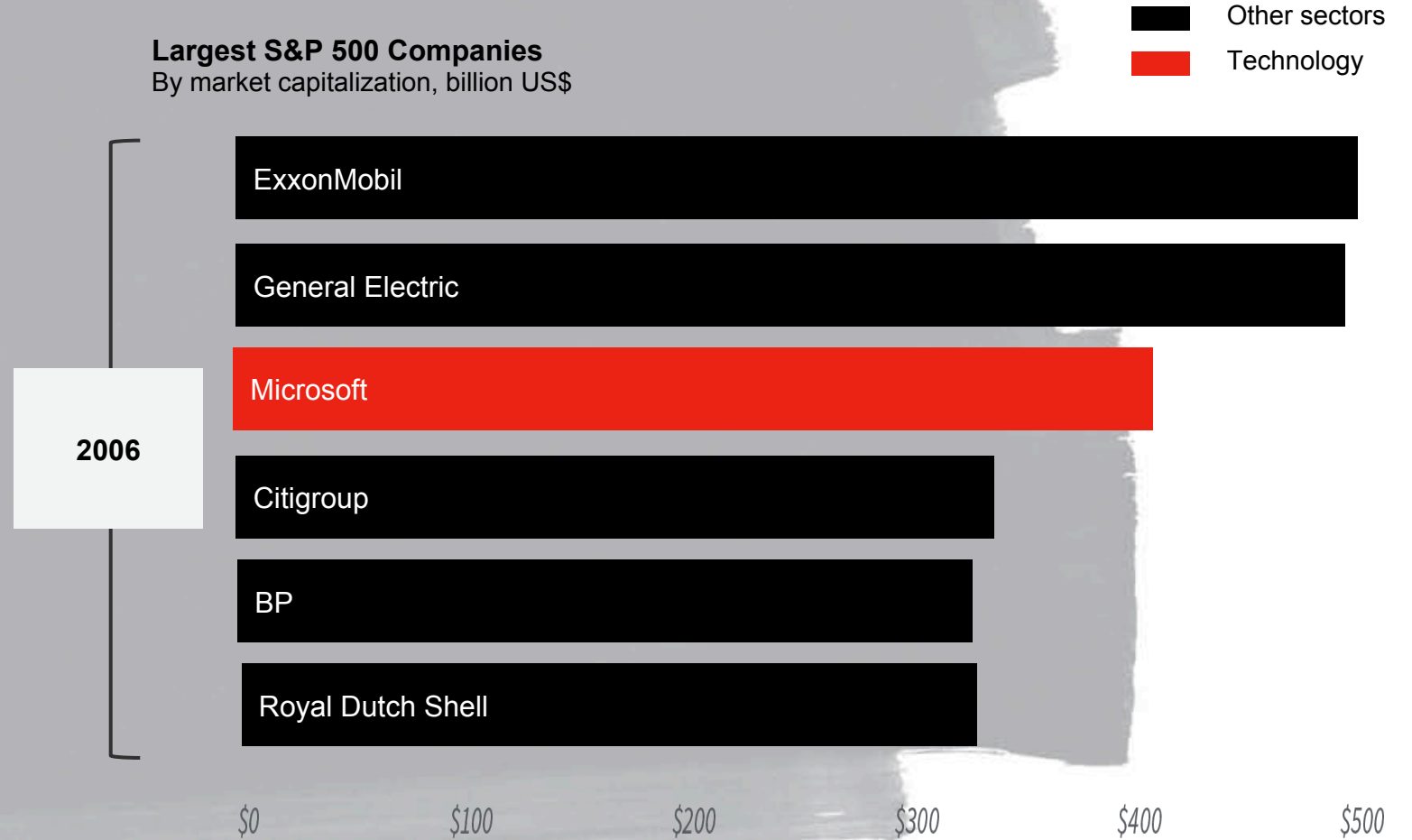
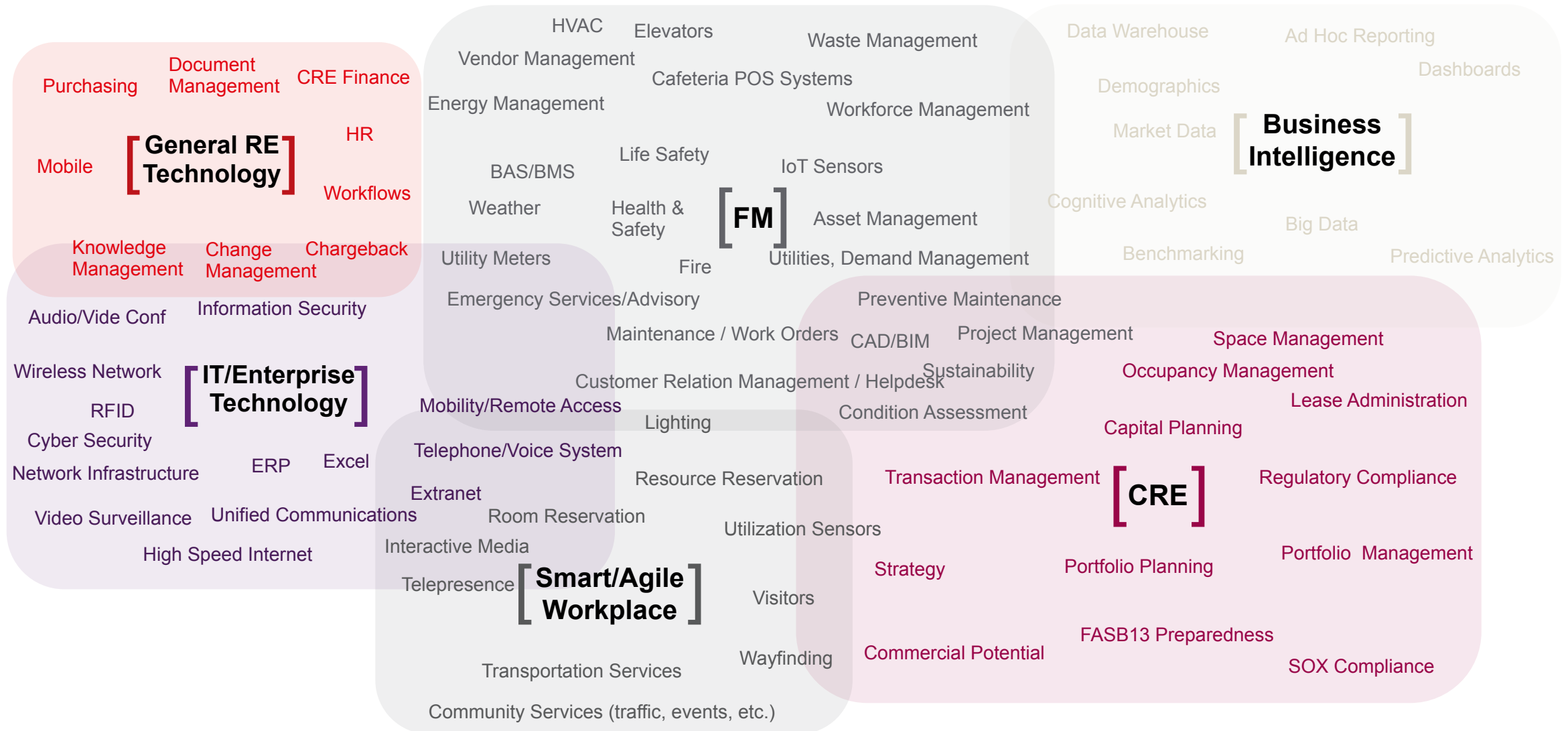


Chart: Yahoo Finance, Forbes, JLL Research, 2016

Ungathered Data is Wasted Resources

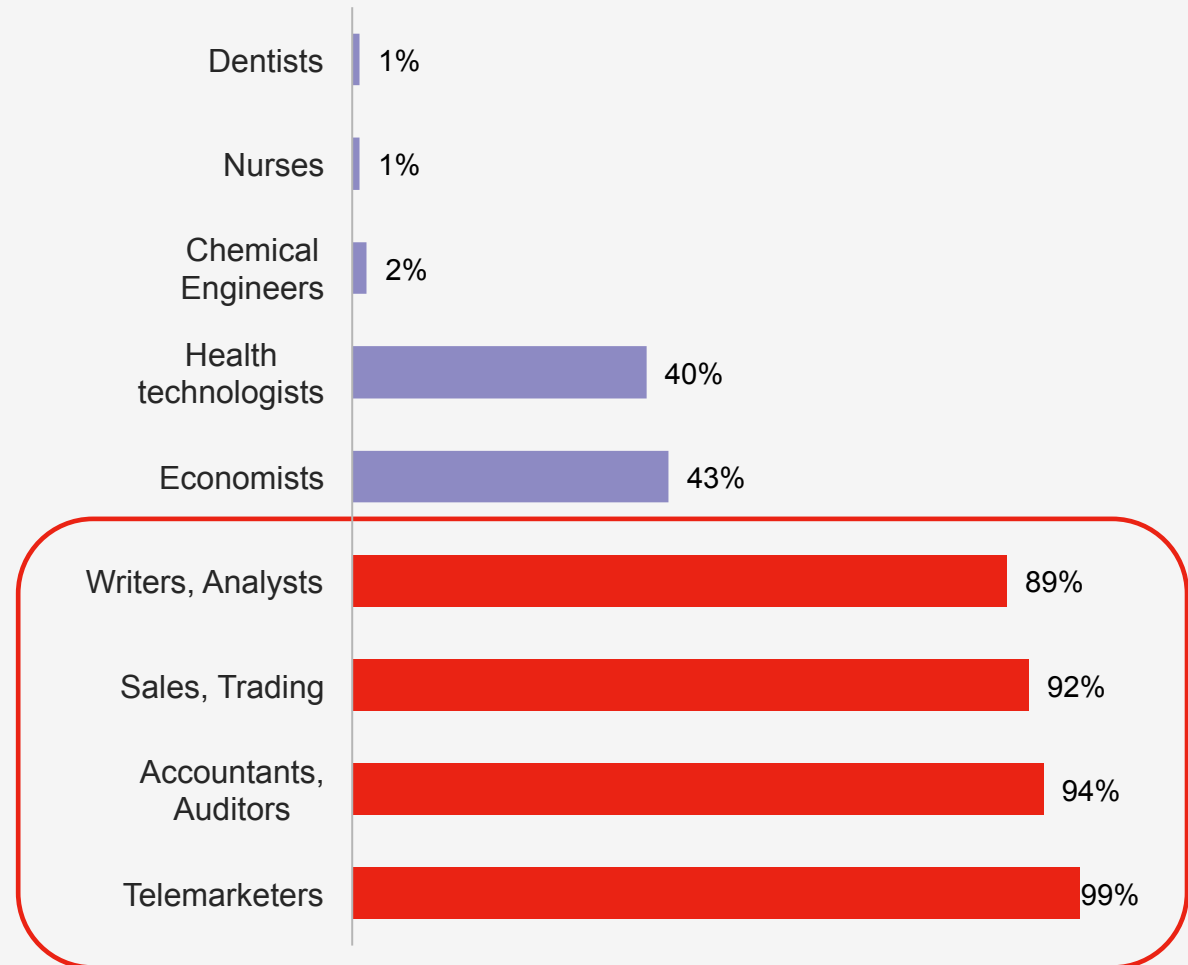


Disruption & Uncertainty

The New Status Quo

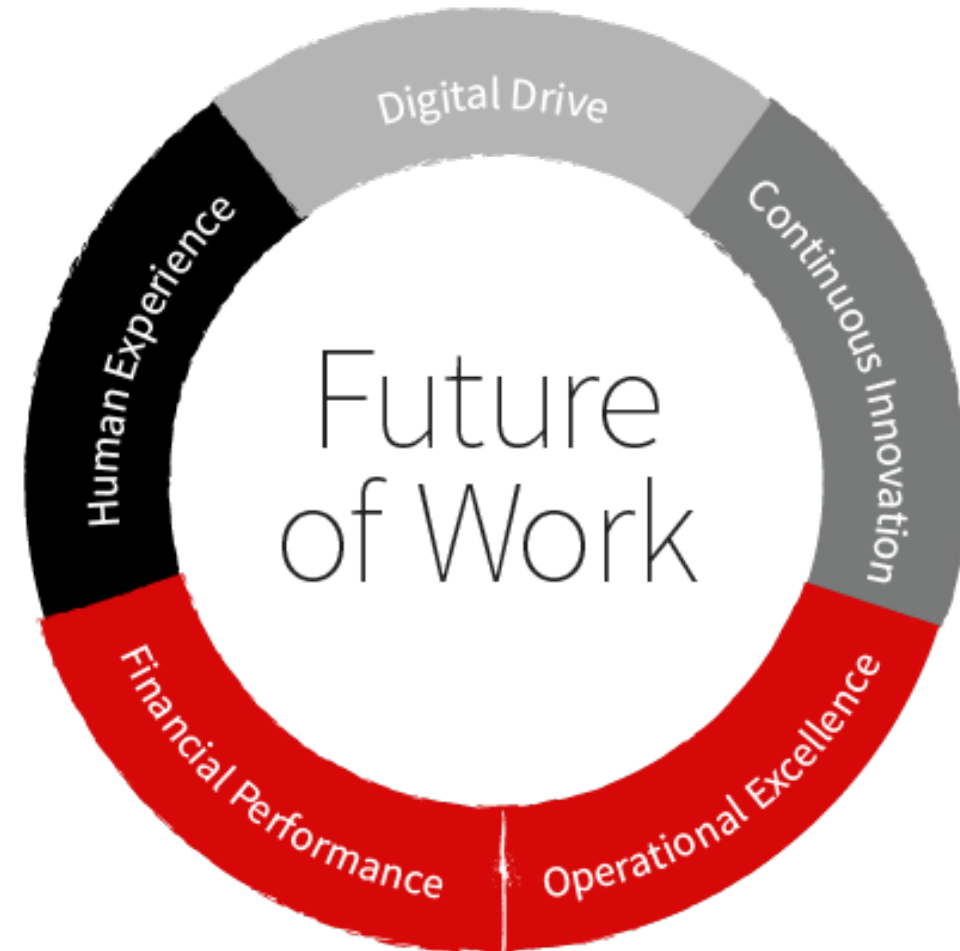
- A wave of automation is impacting the jobs we all hold – in 10 years, you will either be doing a job that doesn't exist right now (or looking for a new one)
- White collar, service and knowledge jobs to see greatest impact by 2030

Probability that computerization will lead to significant job losses by 2030

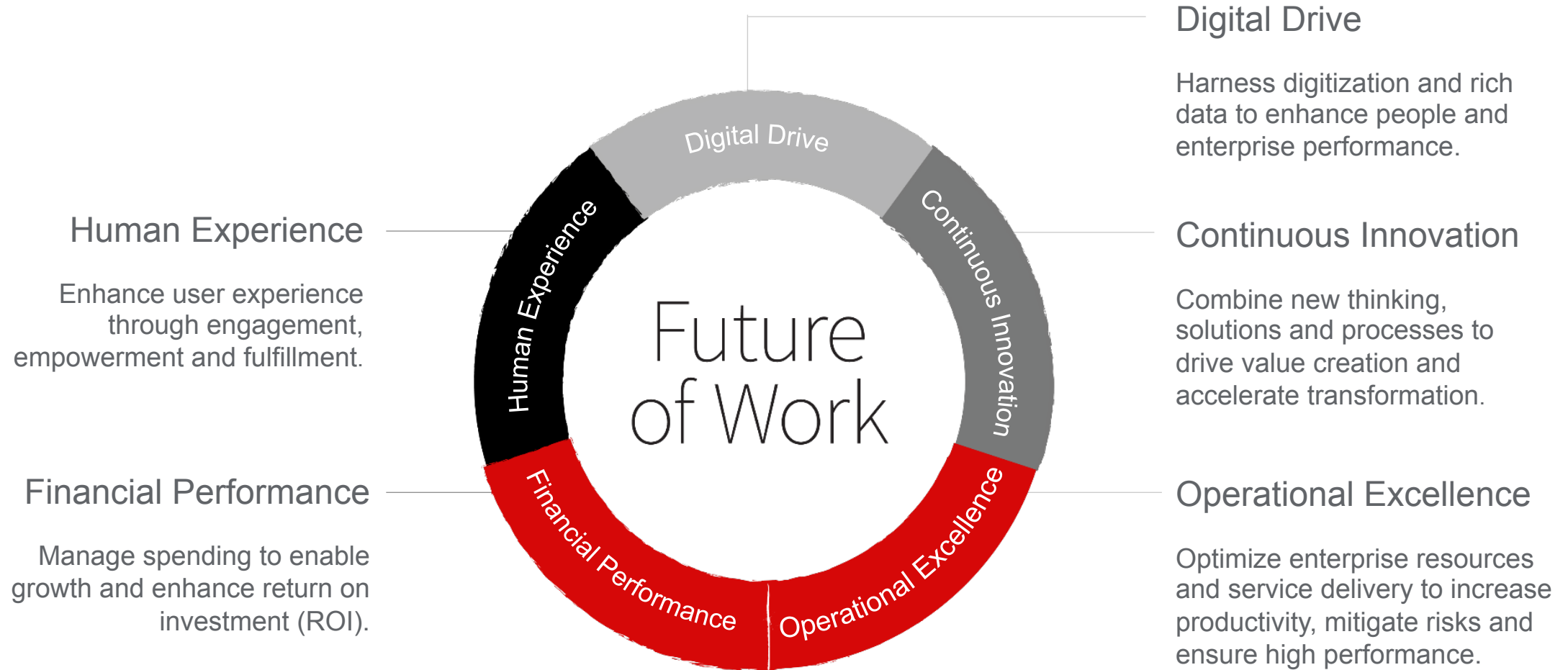


Future of Work

- Outlook on the world of work and its impact on the next generation of corporate real estate
- Embrace uncertainty and turn disruption into opportunity
- Harness and shape complexities
- Elevate the dialogue to take clear and collective action



Decoding the *Five Dimensions*



Future of Work

Appetite for Action



REACTIVE

Respond to and recover from waves of change as they roll through the marketplace and organization.



ACTIVE

Being a willing participant in minimizing risks and preparing for a quick shift based on prevailing forces.



PROACTIVE

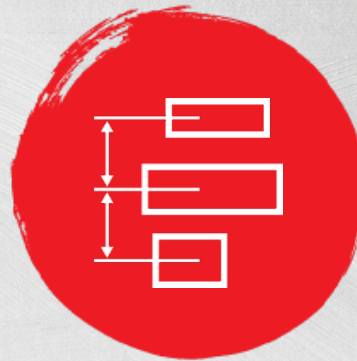
Finding ways to ride the waves to a new reality-aligning parts of the business to envision where the disruption may lead and chart a course for that destination.

Approach is not a one-time choice— it can differ within each dimension

Human Experience

Enhance user experience through engagement, empowerment and fulfillment.

Creating memorable experiences within real estate is a key differentiator for how people engage with an organization. A place of work is more than just a property. It's an ecosystem that can help individuals and businesses achieve their lifeworking ambitions.



Integrated Resources
as a common model
for all services



Predictive Technologies
to anticipate and
refine needs



High-Touch Experiences
for pervasive,
hyper-personalized
and totally flexible

Human Experience



REACTIVE

Workplace mirrors culture and vision.



ACTIVE

Workplace reflects beliefs and promotes behaviors aligned to vision.

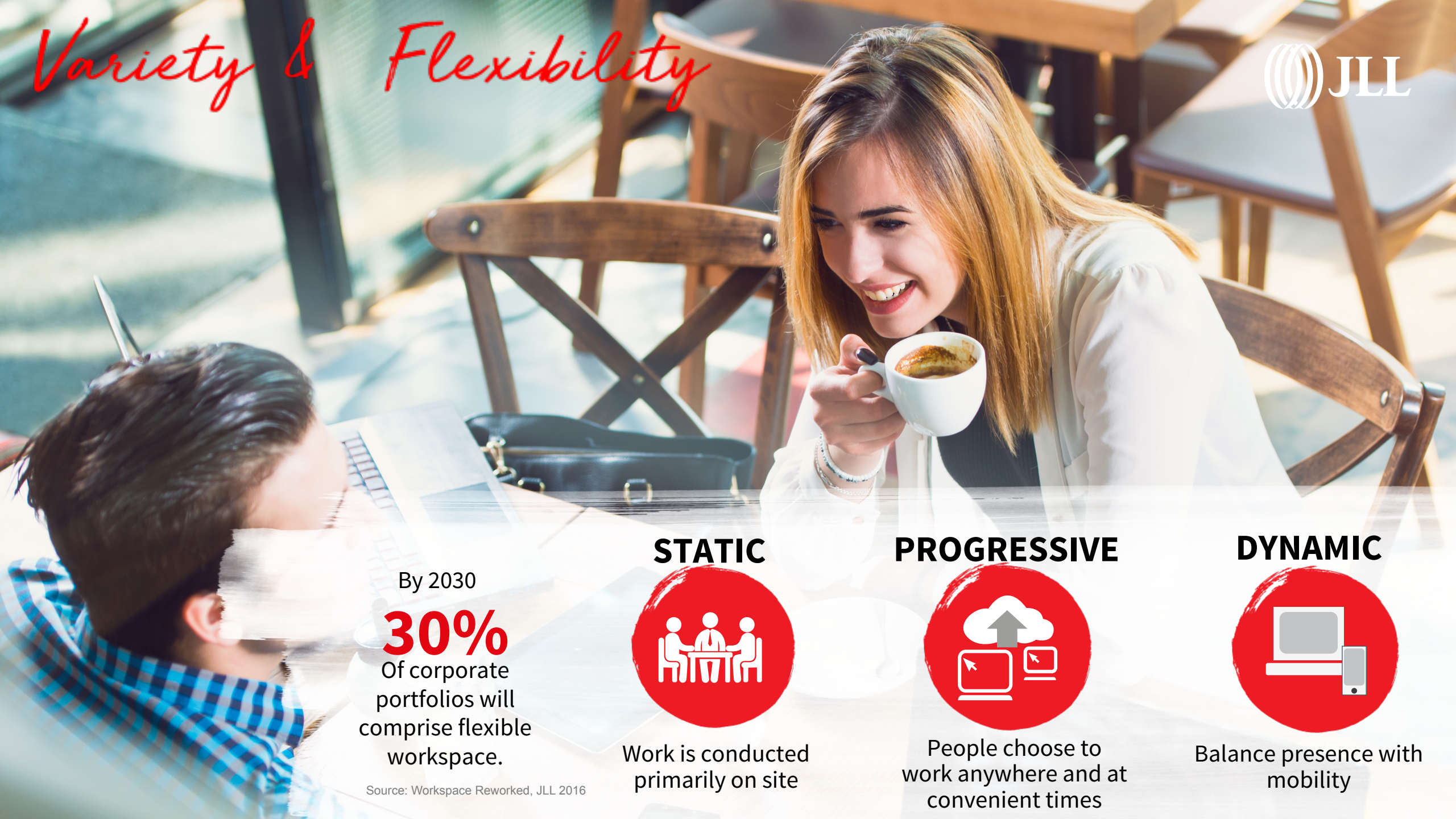


PROACTIVE

Workplace used to attract and retain top talent.



Variety & Flexibility



By 2030
30%
Of corporate
portfolios will
comprise flexible
workspace.

Source: Workspace Reworked, JLL 2016

STATIC



Work is conducted
primarily on site

PROGRESSIVE



People choose to
work anywhere and at
convenient times

DYNAMIC



Balance presence with
mobility

Health



MIND



Management Vision & Practices

BODY



Space, Technology & Services

SPIRIT



Culture, Values & Policies

Investment in health and wellbeing has a

3 to 1
dollar to dollar
payback

Source: WHO
Report



Digital Drive

Harness digitization and rich data to enhance people and enterprise performance.

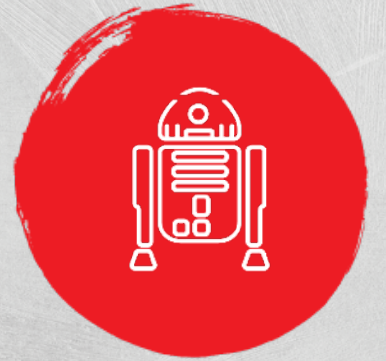
These changes will fundamentally transform the operation of business and the expectations of real estate. Integrated and intelligent technology networks will drive new levels of human and enterprise performance. CRE operations will collide with technologies and data will define real estate.



IoT and Technologies
as a systemic integration
to support individual
preferences



Artificial Intelligence
and predictive
capabilities powered by
intelligent data



**Robotic Process
and Automation**
to drive human-to-
machine enterprise
collaboration

Digital Drive



REACTIVE

Invest in applications that serve core functions.



ACTIVE

Connect across platforms that extract intelligence.



PROACTIVE

Harvest intelligence to inform complex decision making.



Looking Beyond Statistics



Smart buildings



Majunga Tower
La Defense, Paris

- Lighting and temperature controlled by users via mobile app
- Building occupancy tracked in real time through staff badges
- Information used to track empty meeting rooms



The Edge
Deloitte's Amsterdam HQ

- 30,000 sensors
- 6,800 LED lights powered through low-voltage Ethernet cables with sensors
- BMS uses sensors' data to adjust lighting and heating
- One of world's most sustainable office buildings
- Staff locate colleagues via an app

Smart buildings



Asia Square
Singapore

- Intelligent building management delivers a quality indoor environment.
- LEED Platinum award from the US Green Building Council



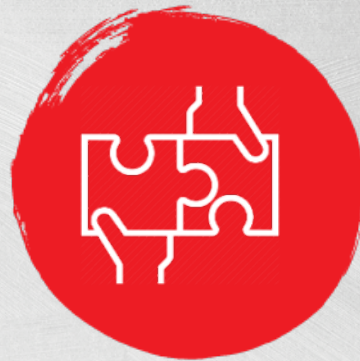
Shanghai Tower
Shanghai

- Roof top wind turbines
- Transparent double glazing structure acts like an insulating blanket and reduces energy costs
- Reclaims rainwater

Continuous Innovation

Combine new thinking, solutions and processes to drive value creation and accelerate transformation.

Innovation will take advantage of hyper-collaboration and leverage advanced technologies, incubators, disruptors and new partnerships (M&A), combined with leading practices to produce advanced tech based solutions to push product and human performance while delivering high return on investment (ROI).



Cross-Collaboration
multiply alliance
partnerships to drive
innovative thinking



**Advanced
Technologies**
to increase
experimentation and
product innovation



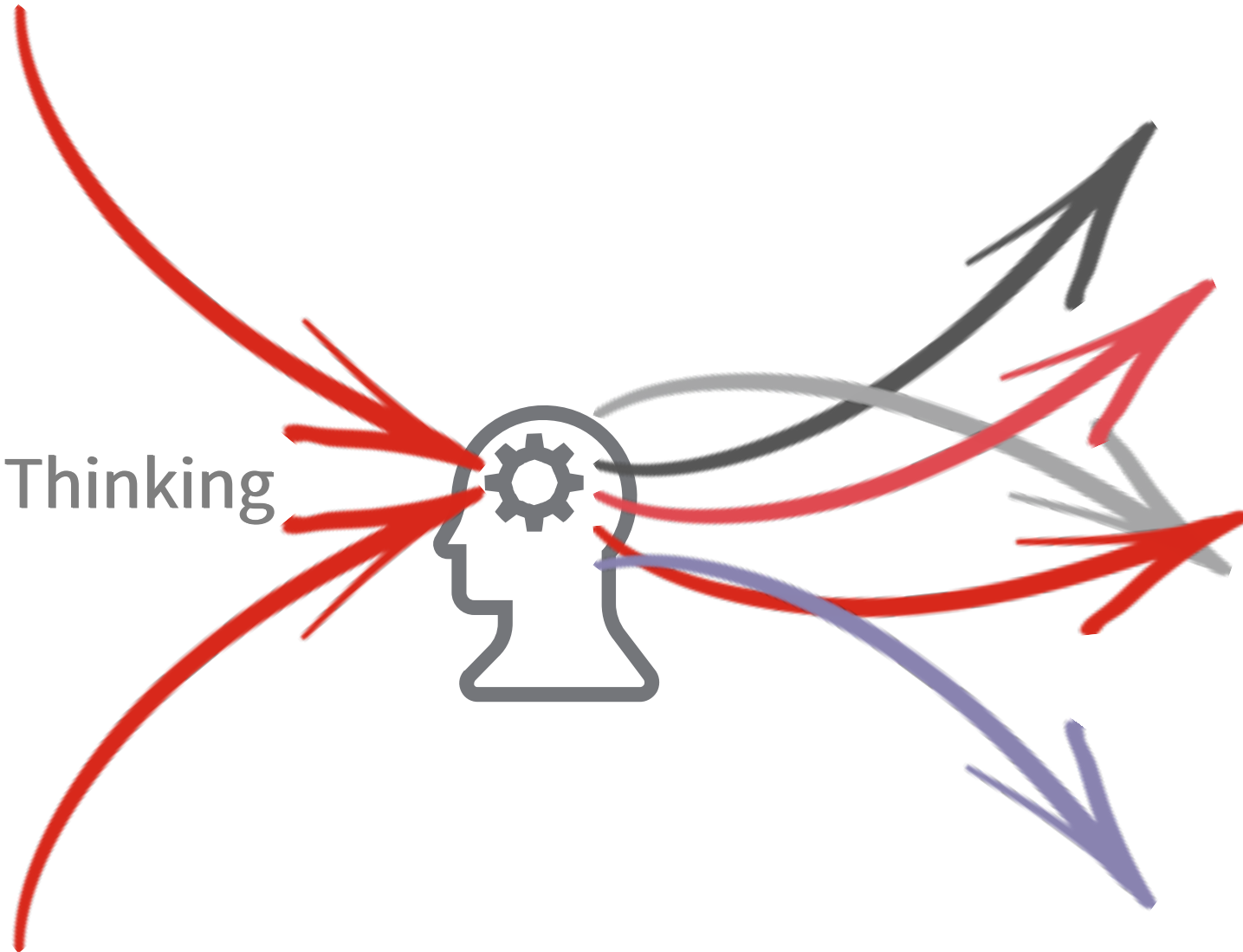
**Networked
Solutions and
Open Innovation**
to drive entirely new
services and
products

A Shift in Thinking



Convergent Thinking

Divergent Thinking



Everyone Can Innovate



Innovation is not limited to technology; more often than not, it is just looking at the same practices through a different lens.



Continuous Innovation



REACTIVE

Engage select partners on projects for current needs.



ACTIVE

Initiate co-creation of solutions for anticipated needs.



PROACTIVE

Build a platform to harness disruption and promote hyper-collaboration.



Thank you

Case Study; Domino's Pizza

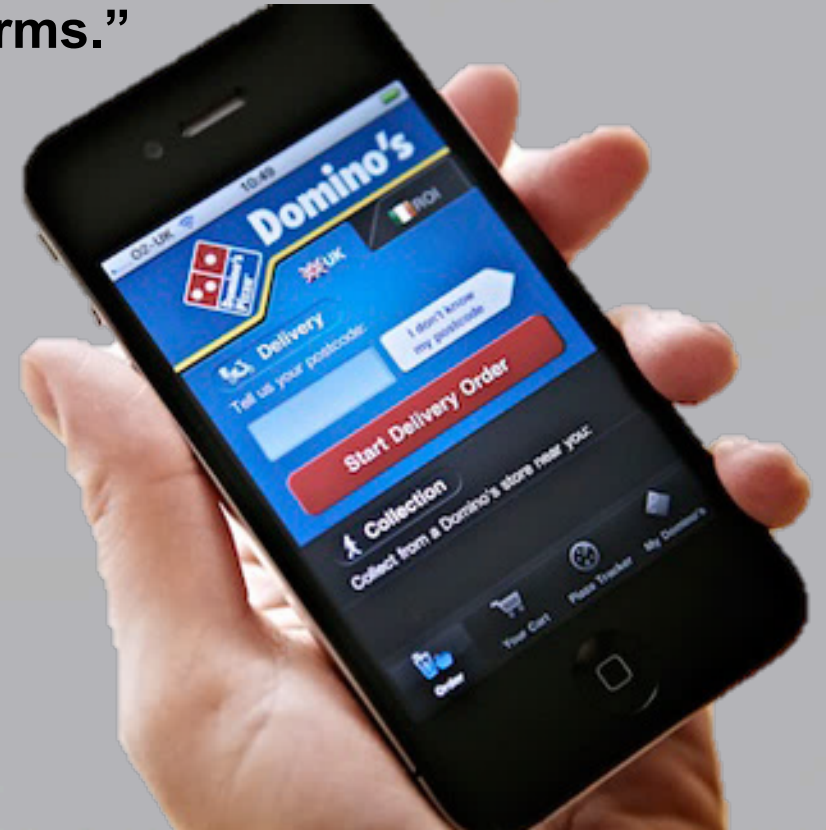


仲量聯行

Domino's was the laughing stock of pizza chains as recently as 2010 with its stock price under \$10/share. Now it's one of the darlings of the restaurant world trading at \$172/share.



Dominos no longer describes itself as simply a pizza company. It's a tech company too. **One of its core missions is to be the "recognized world leader ... in digital ordering and delivery platforms."**



50%

Of the 800 people working at Dominos headquarters work in software and analytics



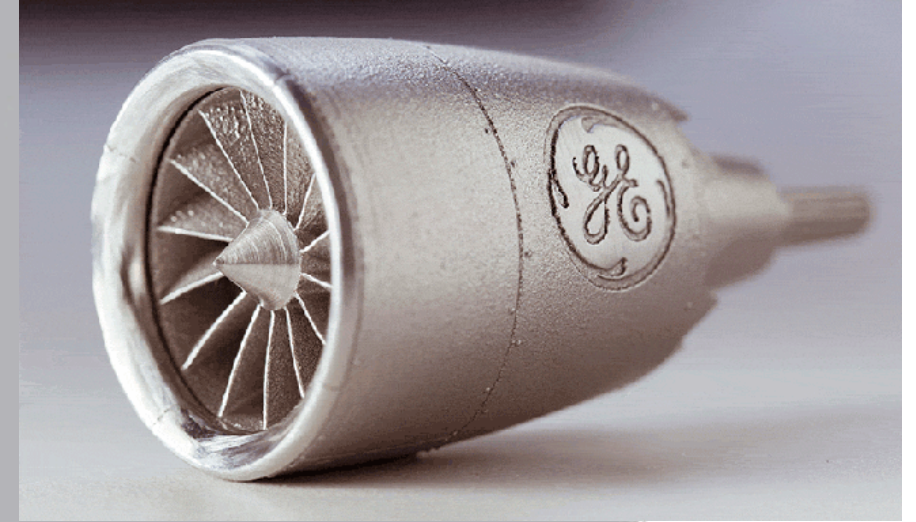
Domino's®

GE The 125 year old start-up

GE is 125 years old and the country's largest manufacturer, with 300,000 employees.

Yet CEO Jeff Immelt is transforming GE into the world's largest digital industrial company through the internet of things, harnessing data to optimize performance, and additive manufacturing technologies like 3D Printing.

*GE went as far as to move its HQ to Boston's Innovation District, again to modernize the brand of the company. **GE is trying to be a 125 year old start up.***



*"The industrial internet it's really **capturing data off of machines** and throwing back into valuable insight for our customers. That's going to be worth trillions of dollars in the economy and I think it's going to transform GE. The data fundamentally is going to be modeled and turned into performance outcomes."*

-Jeff Immelt, CEO