

A modern building interior with a glass and metal facade. The image shows a multi-level structure with large windows and glass railings. The architecture is clean and contemporary, with a mix of white, grey, and blue tones. The lighting is bright, suggesting a well-lit interior space. The overall aesthetic is professional and modern.

## **Nordic REFM Survey 2022**

**An outlook on opportunities and challenges  
facing Scandinavian REFM organizations**

November 2022

## Exciting opportunities for innovation and change in the Scandinavian REFM industry

We are proud to present our annual Nordic REFM Survey, developed in collaboration with DFM (Dansk Facilities Management, Denmark), NKF and NHO Service og Handel (Norway), and IFMA Sweden.

The Real Estate and Facility Management industry has, perhaps more than other sectors, been impacted by significant changes during and after the pandemic. This survey puts the post-pandemic spotlight on important issues that represent both opportunities and challenges for the REFM industry in Scandinavia both from buyer and supplier perspectives.

We would like to thank the 113 organizations that responded to our survey, providing valuable insights on the differences REFM organizations face across Scandinavia and across various sectors.

There are a vast number of highlights and insights that we have consolidated in this report. Amongst them, we would highlight the following:

- Cost Effectiveness, Sustainability, and Quality are the most important strategic priorities for REFM organizations (buyers and sellers) in Scandinavia
- The majority of REFM organizations see impacting Sustainability & ESG as the biggest challenge facing the industry in the coming years, and have Leadership/C-level attention.
- Price/Cost and Quality, however, remain the most important factors when REFM organizations evaluate and select an REFM Supplier.
- We have not and will not return to the office we knew prior to the pandemic - a majority of REFM organizations plan to re-design the office for much lower office presence and significantly reduced office space.
- Innovation is needed in Waste Management, Maintenance, Security, Office Design, Cleaning, and Meeting Services - especially from a Sustainability and Employee Experience perspective. But funding and competencies are barriers.
- Few Nordic employers provide services for employees/FM users at home, and this appears unlikely to change in the future.
- Digitalization of REFM continues, with Scandinavian REFM organizations expected to continue to make significant investment in IT and technology.

Beyond these overarching reflections, the survey's 40+ questions uncovered a wealth of variations and insights across countries and sectors, proving that the REFM industry is as diverse, innovative, and challenging as ever.

Read on to uncover more.

Victor Mannerholm Hammar  
Partner, EY Sweden

Thomas Haver  
Partner, EY Norway

## A note from the Scandinavian REFM industry organizations



Et år efter EY og DFM's tidligere spørgeundersøgelse om rammerne for kontorarbejde (REFM-undersøgelse), er vi glade for at præsentere en opdateret rapport med resultater fra hele Skandinavien. I den danske REFM-branche ser vi, at pandemien har accelereret eksisterende udviklingstendenser, og skabt både nye muligheder og nye problemstillinger for såvel driftsherrer, rådgivere og leverandører. Denne rapport sætter fokus på flere relevante områder for FM, og fremhæver både ligheder og uligheder på tværs af lande og industrier. Som et bindeled imellem vores medlemmer og formidlere af faglig viden om FM, håber vi at denne rapport både kan bekræfte nogle hypoteser og tendenser, og give stof til eftertanke og inspiration.

**Laura Lindahl**  
Direktør DFM



Rapporten viser at det er spennende tider på det kommunaltekniske området. De som har svart vektlegger rekrutterings- og kostnadsutfordringene knyttet til drift- og serviceområdene og fasilitetsstyring, samtidig som teknologi, kunnskap og kvalitet synliggjøres som strategiske utfordringer. Den tydelige forskjellen for Norge, sammenlignet med Danmark og Sverige når det gjelder vektlegging av bærekraft, kan tyde på at både NKF og norske kommuner fortsatt har en jobb å gjøre med å utforske problemstillinger og løsninger knyttet til ressursbruk og klima, samt miljømessig og sosial bærekraft. NKF vedtok under landsmøtet i mai 2022 en ny strategi, Miljøagentene. Arbeid med bærekraft i kommunalteknisk sektor er et sentralt premiss for foreningens strategiske retning de neste årene. Denne rapporten understøtter arbeidet som gjøres i foreningen.

**Kirsti Kierulf**  
Adm. Dir. NKF



FM-området i Norge og Norden er i rask utvikling. Fra å være et område for avgrensede enkelt-tjenester ser vi en økt bredde og etterspørsel etter multiservice-tjenester og integrert fasilitetsstyring. Samtidig ser vi en betydelig bransjegliding med utvidelse av tjenestespekter inn mot andre bransjer. Dette er den første felles-nordiske kartleggingen innen FM-området som både ser på effekten koronaen har hatt på ansattes arbeidsmønstre og på innovative nye tjenesteområder og samarbeidsformer. Rapporten tar et dypdykk i utfordringer knyttet til fasilitetsstyring og løfter fram strategiske grep for framtidens arbeidsplasser. Respondentene vektlegger samarbeid og relasjonsutvikling som kritiske faktorer for å lykkes både med innovasjon og bærekraft.

**Jorulf Brøvig Silde**  
Bransjedirektør, Bransjeforeningen for Drift og Service




Det råder inte längre något tvivel om att det är strategiskt viktigt med väl fungerande FM. Som bransch är vi en viktig pusselbit när det kommer till att möjliggöra den transformation av arbetslivet som pågår idag och de närmsta åren. IFMA Sverige bidrar aktivt till detta genom att skapa mötesplatser för branschen och genom att skapa större sammanhang och perspektiv. Den här rapporten bidrar till just större sammanhang och perspektiv och framtagen i samarbete med EY och andra branschorganisationer i Skandinavien. Rapporten ger unika insikter som är relevanta inte bara för FM-branschen utan också utan också för beslutsfattare och studenter.


**Joachim Boëthius**  
Styrelsen, IFMA Sverige

# About the survey

## Countries

113 REFM organizations across Scandinavia responded to the survey (August-September 2022)

 **46**  
in Norway (41%)

 **40**  
in Denmark (35%)

 **27**  
in Sweden (24%)

## Sectors

The respondents represent 10 different sectors, both public and private, and including RE/FM suppliers. For public and private sector, the respondents were typically 'Heads of FM' or similar.

46 Public Sector organizations (41%)

31 Private Sector firms (27%)

36 REFM Suppliers (32%)

**34**  
Municipalities

**5**  
Education

**11**  
Manufacturing

**7**  
Professional  
Services

**4**  
Consumer  
Retail

**28**  
FM Suppliers

**7**  
Government

**7**  
Finance & IT

**4**  
Energy

**8**  
Real Estate  
& Infrastructure

## Users/Employees

The respondents provide FM services to over 300,000 users in Scandinavia alone

**11%**  
<100  
employees

**14%**  
100-500  
employees

**16%**  
501-1.000  
employees

**27%**  
1.001-5.000  
employees

**18%**  
5.001-10.000  
employees

**14%**  
>10.000  
employees

## Office Space

The respondents oversee 20 million (gross) m<sup>2</sup> of corporate/office real estate in Scandinavia (owned and rented)

**5%**  
Up to 1.000m<sup>2</sup>

**34%**  
Up to 50.000m<sup>2</sup>

**34%**  
Up to 100.000m<sup>2</sup>

**14%**  
Up to 500.000m<sup>2</sup>

**7%**  
Up to 1.000.000m<sup>2</sup>

**10%**  
Over 1.000.000m<sup>2</sup>

# Key Findings

What are some of the most interesting results we observed?

## Strategic REFM

There is a clear consensus across all Scandinavia that REFM's strategic priorities are cost effectiveness, quality, and sustainability. Especially the first two factors matter most when selecting a supplier. REFM organizations also have strong collaboration with C-level/leadership especially, but allocating sufficient resources and defining a shared vision are the greatest challenges for internal collaboration.

### Strategic Priorities & Challenges

**+90%**

Cost Effectiveness, Sustainability, and Quality are the most important strategic priorities

**+54%**

Impacting sustainability/ESG is the top challenge in the next 2-3 years

### Internal Collaboration & Challenges

**+65%**

Collaboration is strongest with C-level leadership & Finance/Procurement

**+50%**

Allocating sufficient resources, and defining a shared vision/ambition are the biggest challenges for successful collaboration

### Service & Supplier Strategy

**78%**

Outsource FM services - 22% have in-house FM

**23%**

Will consolidate suppliers in the next 2-3 years

**69%**

Say price/cost is a top supplier criteria (#1)

**50%**

Say quality is a top supplier criteria (#2)

## Innovative REFM

Across Scandinavia, there is generally a strong ambition to innovate within REFM across many topics - especially sustainability/ESG and energy, as well as selected 'Hard' and 'Soft' FM areas. Typically, the biggest barrier for innovation is conflicting interests (aligning the need to innovate with the need to reduce costs or grow revenues), and the availability of innovation resources, skills/capabilities and funding.

### Strategic Priorities

**+48%**

Expect to innovate on sustainability/ESG, and energy/electricity

**+50%**

Agree innovation is mostly needed around Waste Mgmt., Maintenance, Security, Office Design, Cleaning, and Meeting Services

### Partnerships & Challenges

**56%**

Partner internally for innovation - only 25-40% partner externally (e.g. suppliers, customers, etc.)

**40%**

Believe the biggest barrier to innovation partnerships are conflicting interests (e.g. cost reduction)

## IT & Technology

There is strong agreement amongst REFM organizations on the need to increase investment in IT to make REFM 'smart' and generally more digital. Many expect to invest to also improve the meeting experience. However, limited budgets and data complexity are a challenge.

### Investment & Priorities

**72%**

Will increase investment in IT over the next 3 years

**+47%**

Will invest to make REFM 'smart', app-based, and automated

### User Needs & Challenges

**50%**

Will invest in solutions to improve online meetings and finding meeting rooms

**+50%**

Believe limited budgets and integrating data are the top challenges

# Key Findings

What are some of the most interesting results we observed?

## Flexible Ways of Working

Many REFM organizations report that daily office presence has declined noticeably, as employees in Scandinavia tend to work from home 1-3 days per week. It is most common in Scandinavia to define a policy allowing some flexibility for remote work, while only a minority have taken a step further and defined fixed days in the office.

### Policy & Guidelines

<b>63%</b> Indicate that employees work from home 1-3 days/week	<b>77%</b> Allow remote work at least 1 day/week	<b>70%</b> Do not define set/fixed days to be in the office	<b>29%</b> Let manager and employee decide
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### Office Presence

<b>57%</b> Report that between 40-80% of employees are in the office on a given day	<b>66%</b> Report that office presence has fallen by +16% post-pandemic	<b>70%</b> Tuesday, Wednesday, & Thursday are the most 'popular' in-office days	<b>42%</b> Currently measure building and desk occupancy (22% are considering it)
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## Workplace of the Future

The majority of Scandinavian REFM organizations believe the purpose of the office is changing, and will change their workplace concept in the next 0-2 years. The main change will be to reduce space by more than 10%, by reducing the number of desks - while still providing sufficient meeting rooms.

### The Scandinavian Workplace

<b>44%</b> Believe the office is an Anchor where we work most days	<b>48%</b> Fixed seating as their primary workplace concept	<b>27%</b> Free seating as their primary workplace concept	<b>65%</b> Average area efficiency of 10-19m <sup>2</sup> per employee (gross)
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### Future Workplace Design

<b>71%</b> Will change the physical design of the workplace in the next 0-2 years	<b>53%</b> Reduce office area (sqm/employee) by more than 10%	<b>56%</b> Reduce the number of desks by more than 10%	<b>29%</b> Increase the number of meeting rooms by more than 10%
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## Home Office

Most organizations offer a limited number of services for the employees' home office, typically just the PC/laptop. Additionally, they may provide a monitor and/or furniture (desk/ergonomic chair).

### Services & Financing

<b>42%</b> Provide IT equipment for the home office	<b>39%</b> Offer only a PC/laptop	<b>45%</b> Pay for all the new home services provided	<b>97%</b> Do not expect to compensate employees for working from home
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# Country Highlights

Where do we see country-specific differences? (Compared to the Scandinavian average)

## Denmark

In Denmark, there is a stronger focus on sustainability within REFM, and more see a lack of skills as a barrier/challenge. It is also much more common for Danish employers to provide additional IT equipment and furniture for employees' home office compared to Norway and Sweden. While Danish workplaces may be slightly less area efficient than the rest of Scandinavia, there is a similar ambition to improve the workplace of the future.

- |                             |                                                                                                                                                                                                                                                                                          |
|-----------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Strategic & Innovative REFM | <ul style="list-style-type: none"><li>• 80% say that impacting sustainability and ESG is a top challenge for REFM (54%)</li><li>• 58% say skills/capabilities is the biggest barrier to innovation within REFM (33%)</li><li>• 34% have an in-house FM strategy (22%)</li></ul>          |
| Flexible Ways of Working    | <ul style="list-style-type: none"><li>• 65% provide IT equipment and 43% provide furniture for home offices (42% / 26%)</li><li>• 48% report that the average office presence is 26-50% of employees (35%)</li><li>• 44% say employees tend to work from home 1 day/week (23%)</li></ul> |
| Workplace of the Future     | <ul style="list-style-type: none"><li>• 81% will change the physical design of the workplace in the next 2 years (71%)</li><li>• 42% have an area efficiency of 15-19 sqm/employee (gross) (29%)</li></ul>                                                                               |

## Norway

In Norway, price/cost has a very strong focus compared to the other Scandinavian countries, and more respondents identify a lack of competencies and retention of REFM employees as a challenge. While many Norwegian REFM organizations say they will optimize the workplace of the future (e.g. area utilization), the decline in office presence appears less pronounced than the other Scandinavian countries.

- |                             |                                                                                                                                                                                                                                                                                                                                                                                  |
|-----------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Strategic & Innovative REFM | <ul style="list-style-type: none"><li>• 83% say price/cost is the top criteria when selecting a supplier (69%)</li><li>• 66% say a lack of competencies is a barrier for IT innovation in FM (36%)</li><li>• 51% say attracting and retaining REFM employees is a top challenge (31%)</li><li>• 43% say funding is the biggest barrier to innovation within REFM (30%)</li></ul> |
| Flexible Ways of Working    | <ul style="list-style-type: none"><li>• 77% indicate that Monday is one of the most popular days 'in the office' (44%)</li><li>• 53% indicate that office presence is unchanged (26%)</li></ul>                                                                                                                                                                                  |
| Workplace of the Future     | <ul style="list-style-type: none"><li>• 96% say they will decrease the amount of office space and desks provided (77% / 88%)</li><li>• 63% have fixed seating as the main workplace concept (48%)</li></ul>                                                                                                                                                                      |

## Sweden

In Sweden, the post-pandemic change to ways of working appears to be the greatest, as REFM organizations report a noticeable decline in office presence. Perhaps as a result, Swedish REFM organizations look to be more innovative in redesigning the workplace (e.g. more free seating without home zones), and also in redesigning their supplier/partner strategy for greater flexibility with e.g. new reward/financing models.

- |                             |                                                                                                                                                                                                                                                                   |
|-----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Strategic & Innovative REFM | <ul style="list-style-type: none"><li>• 81% believe adapting to new ways of working is a top challenge for REFM (44%)</li><li>• 41% have an integrated facility service strategy (21%)</li><li>• 33% are looking into new reward/financing models (13%)</li></ul> |
| Flexible Ways of Working    | <ul style="list-style-type: none"><li>• 50% report that the average office presence is 26-50% of employees (35%)</li><li>• 41% say employees tend to work from home 3 days/week (12%)</li><li>• 28% have free seating without home zones (8%)</li></ul>           |
| Workplace of the Future     | <ul style="list-style-type: none"><li>• 96% will change the physical design of the workplace in the next 2 years (71%)</li><li>• 59% will innovate the workplace experience (bricks, bytes, behaviors) (30%)</li></ul>                                            |

# Sector Highlights

Where do we see sector-specific differences? (Compared to the Scandinavian average)

## Consumer Retail

- 100% say that managing costs is a top challenge for REFM (42%)
- 50% are looking into shorter contract lengths (22%)
- 67% say their average space utilization is 5-9 sqm/employee (16%)

## Education

- 100% say Sustainability/ESG and Digital & Cybersecurity are key innovation areas (49%)
- 80% have a strong collaboration with leadership/C-level today (68%)
- 60% say outdoor areas are more in need of innovation (37%)

## Energy

- 100% say there are +16% fewer employees in the office than before the pandemic (35%)
- 100% say collaboration is a main evaluation criteria for selecting an FM Supplier (29%)
- 75% have a Partnership-based FM strategy (22%)

## Financial Services & IT

- 86% say adapting to new ways of working is a top challenge for REFM (54%)
- 86% measure building and desk utilization today (42%)
- 71% say there are +16% fewer employees in the office than before the pandemic (35%)

## FM Suppliers

- 87% say they will change the workplace concept in the next 0-2 years (71%)
- 79% say price/cost is a top supplier evaluation criteria (39%)
- 71% say they will increase IT investments +10% in the next 0-3 years (33%)

## Government

- 100% say that managing costs is one of the top challenges for REFM (42%)
- 100% say they pay for furniture and IT equipment for the home office (42%)
- 80% say allocating sufficient resources is a challenge for internal collaboration (55%)

## Manufacturing

- 88% say they will increase FM IT investments by 1-10% in the next years (39%)
- 73% say that sustainability and ESG is a key innovation focus area (54%)
- 65% say leadership attention/buy-in is a top challenge for internal collaboration (38%)

## Municipality

- 88% say that price/cost is a top supplier selection criteria (69%)
- 56% say that managing costs is one of the top challenges for REFM (54%)
- 47% say office presence is unchanged since the pandemic (26%)

## Professional Services

- 100% say they will change the workplace concept in the next 0-2 years (71%)
- 75% say they will invest in hosting online meetings and events (50%)
- 60% say that impacting employee experience is a top challenge for REFM (19%)

## Real Estate & Infrastructure

- 100% will reduce the number of desks by 11-20% compared to today (32%)
- 86% say that flexibility is a top strategic priority for REFM (36%)
- 71% say unclear user requirements make IT innovation difficult (31%)



# Strategic REFM

# Strategic REFM

## Summary of Findings

### Strategic Priorities & Challenges

The most important strategic priorities for over 85% of respondents are: Cost Effectiveness, Sustainability, Employee Experience, and Quality.

No clear consensus emerges with regard to the greatest challenges facing the REFM industry. Nonetheless, a small majority (54%) say that sustainability and ESG is one of the top 3 challenges. Survey respondents also say there is especially a need to adapt to new ways of working (e.g. more flexible/hybrid work - 44%) and manage costs (42%).

### Internal Collaboration

56-68% of respondents say they have a 'Very Strong' or 'Strong' collaboration with Leadership/C-level Management, Finance/Procurement, IT, and HR/People. The 'strongest' collaboration overall is with Leadership.

The top three challenges to internal collaboration are deemed to be: allocating sufficient resources (55%), defining a shared vision and ambition (53%), and agreeing on a need for change (43%).

### FM Sourcing Strategy

The choice of REFM Sourcing Strategy varies across Scandinavia - primarily between multiple service (24%), in-house (22%), and integrated facility services (20%).

23% of respondents indicate that they will consolidate and reduce the number of suppliers, while 21% indicate they will not be making any change to their strategy in the next 1-2 years.

A significant majority of respondents (69%) indicate that Price/Cost is one of the three most important criteria when evaluating and selecting an FM-supplier. The other major criterion is Quality, which 50% of Scandinavia REFM organizations say is in the top 3. Besides those two criteria, the selection criteria for evaluating and selecting a supplier tends to vary between Collaboration, Sustainability/ESG, Trust, and People & Competencies.



# Strategic Priorities for REFM

For your RE/FM/Workplace organization, how important are the following strategic priorities and values?



The strategic focus of REFM is changing, as both REFM buyers and suppliers must respond to a growing number of requirements and expectations from an increasing number of stakeholders.

The survey respondents indicate that the most important strategic priorities are Cost Effectiveness, Sustainability, Employee Experience, and Quality. Over 85% of respondents say these factors are Important or Very Important.

In fact, between 65-90% of respondents respond that all the factors listed are either 'Very Important' or 'Important'.

However, as can be seen below there are noticeable differences by country and industry.

## By Country

What are the top 3 strategic priorities and values?  
(% of respondents answering 'Very Important')

- Denmark**
  - Sustainability (51%)
  - Flexibility (41%)
  - Cost Effectiveness (41%)

- Norway**
  - Cost Effectiveness (55%)
  - Employee Experience (55%)
  - Quality (41%)

- Sweden**
  - Sustainability (78%)
  - Employee Experience (59%)
  - Cost Effectiveness, Diversity & Inclusion, Risk Management, Quality (all 56%)

- All countries respond that Cost Effectiveness is 'Very Important', but none more so than Norway (55%).
- Sustainability is the most important factor in both Denmark and Sweden. This is not the case in Norway, where only 30% of respondents agree it is 'Very Important'.
- Employee Experience is important in Norway and Sweden (55% and 59%, respectively) - in Denmark, only 31% of respondents answer the same.

## By Sector

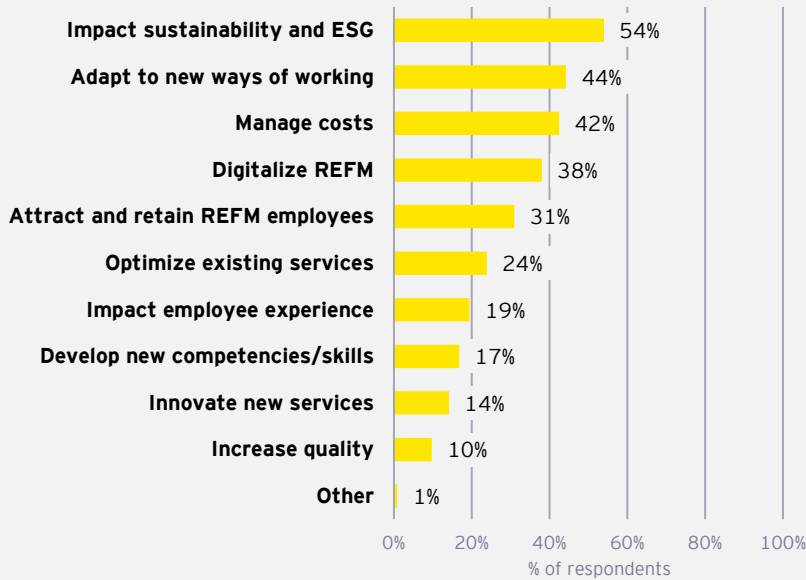
What is the top strategic priority?  
(Factor with highest % of respondents answering 'Very Important')

- Consumer Retail**: Sustainability, Efficiency, Employee Experience (50% each)
- Education**: Sustainability (100%)
- Energy**: Cost Effectiveness, Sustainability (75% each)
- Financial Services & IT**: Cost Effectiveness, Employee Experience (53% each)
- FM Supplier**: Cost Effectiveness (67%)
- Government**: Efficiency, Risk Management (57% each)
- Manufacturing**: Cost Effectiveness (82%)
- Municipality**: Cost Effectiveness, Employee Experience (50% each)
- Professional Services**: Employee Experience (86%)
- Real Estate & Infrastructure**: Flexibility (86%)

- Noticeable differences in priorities across industries - however, for majority of industries the most important factor is either Sustainability, Cost Effectiveness, or Employee Experience.

# Strategic Challenges facing REFM

## What are the 3 most important challenges for REFM to address in the next 3 years?



REFM organizations, from buyers to suppliers, also face strategic challenges they must address over the coming years.

No one challenge dominates, suggesting the industry has diverging views of what challenges we are facing.

Nonetheless, a majority (54%) say that sustainability and ESG is one of the top 3 challenges REFM organizations face. There is also a need to adapt to new ways of working (e.g. more flexible and hybrid work - 44%) and manage costs (42%).

Less than 20% see the need to impact employee experience (although this is a strategic priority for many), develop new competencies/skills, innovate new services, or increase quality.

## By Country

### What are the top 3 strategic challenges? ( % of respondents ranking factor amongst top 3 )

- Denmark**
1. Impact sustainability and ESG (80%)
  2. Digitalize REFM (50%)
  3. Adapt to new ways of working (45%)

- Norway**
1. Attract and retain REFM employees (54%)
  2. Manage costs (46%)
  3. Impact sustainability and ESG (39%)

- Sweden**
1. Adapt to new ways of working (81%)
  2. Impact employee experience (48%)
  3. Manage costs, Impact sustainability and ESG (all 41%)

- In both Denmark and Sweden, there is a clear consensus among a significant majority (+80%) of respondents on one particular challenge. In Denmark, the challenge is to impact sustainability and ESG (80%). In Sweden, the majority see a challenge in adapting to new ways of working (81%).
- In Norway, a small majority (54%) agree that one of the top 3 challenges is attracting and retaining REFM employees. However, the consensus on this challenge is only marginally greater than other challenges, suggesting more diverse opinions in Norway.
- Across all countries, the ability to impact sustainability and ESG is one of the top 3 challenges.

## By Sector

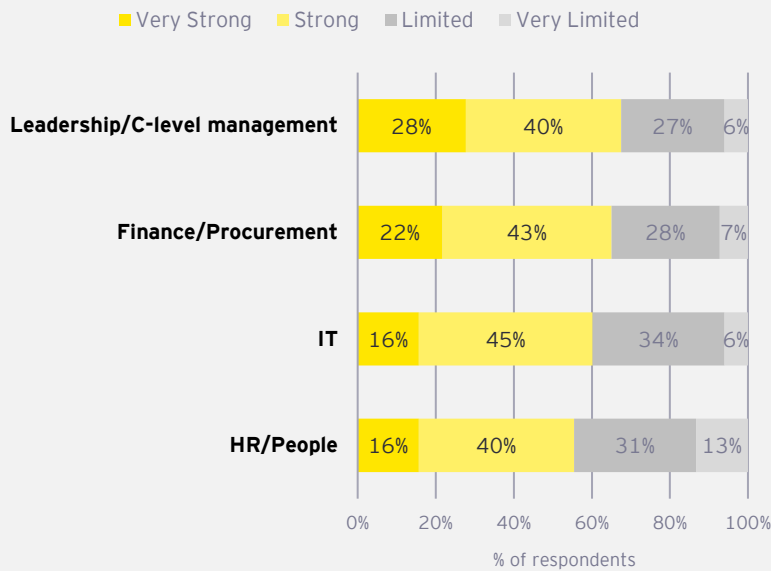
### What is the top strategic challenge? (Factor with highest % of respondents)

<b>Consumer Retail</b>	Manage costs (100%)
<b>Education</b>	Impact sustainability and ESG (100%)
<b>Energy</b>	Adapt to new ways of working (100%)
<b>Financial Services &amp; IT</b>	Adapt to new ways of working (86%)
<b>FM Supplier</b>	Adapt to new ways of working, Attract and retain REFM employees (46% each)
<b>Government</b>	Manage costs (83%)
<b>Manufacturing</b>	Impact sustainability and ESG, Adapt to new ways of working (73% each)
<b>Municipality</b>	Manage costs (56%)
<b>Professional Services</b>	Impact sustainability and ESG, Impact employee experience (60% each)
<b>Real Estate &amp; Infrastructure</b>	Impact sustainability and ESG (75%)

- Clear challenges dominate within sectors. For Consumer Retail, Government, and Municipality the challenge is to manage costs (56-100%). For Education, Manufacturing, Prof. Services, and Real Estate & Infrastructure it is to impact sustainability and ESG (53-100%). For Energy, Financial Services & IT, FM Suppliers, and Manufacturing the challenge is to adapt to new ways of working (86-100%).

# Internal Collaboration

## How strong is your REFM organization's collaboration with the following departments today?



REFM is increasingly on the strategic agenda - and it shows.

56-68% of respondents say they have a 'Very Strong' or 'Strong' collaboration with Leadership/C-level Management, Finance/Procurement, IT, and HR/People.

The 'strongest' collaboration is with leadership, proving that REFM increasingly has the attention of the C-level. There is also strong collaboration with Finance/Procurement, a traditional 'ally' or partner for many REFM organizations.

Notably, collaboration with HR, while still rather strong, scores the lowest of the four departments. This is an area of improvement since the 'Workplace Experience' is a key factor for creating a great 'People Experience'.

### By Country

#### Where is collaboration strongest?

(Top 3 departments ranked by % of respondents answering Very Strong/Strong)

- Denmark**
  - Leadership/C-level (60%)
  - Finance/Procurement (55%)
  - IT (55%)
- Norway**
  - Finance/Procurement (41%)
  - Leadership/C-level (35%)
  - IT (28%)
- Sweden**
  - Leadership/C-level (59%)
  - IT (56%)
  - HR/People (52%)

- Generally, more than 50% of respondents in Denmark and Sweden say they have 'Very Strong' or 'Strong' collaboration with other departments. In Norway, it is only between 30-40% that say the same.
- Respondents from Denmark and Sweden have stronger collaboration with Leadership/C-level (~60%) in particular.

### By Sector

#### Where is collaboration strongest?

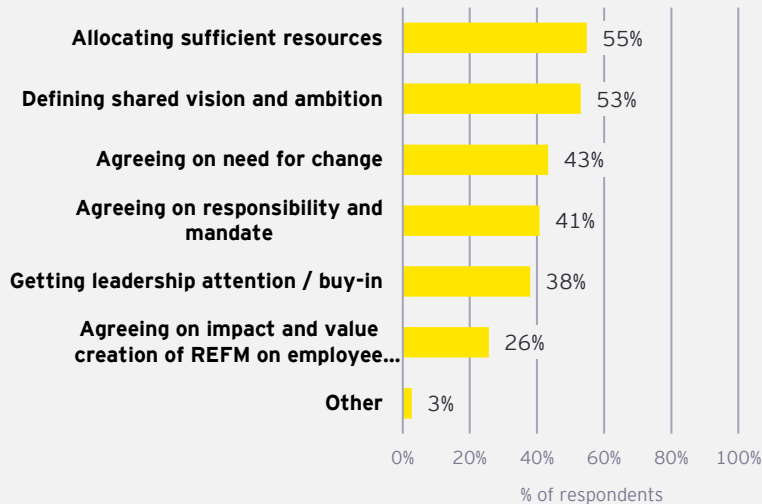
(Department with highest % of respondents answering Very Strong/Strong)

- Consumer Retail**: HR/People, IT (75% each)
- Education**: Leadership/C-level (80%)
- Energy**: IT, Leadership/C-level (100% each)
- Financial Services & IT**: Finance/Procurement (86%)
- FM Supplier**: N/A (not asked)
- Government**: HR/People, Finance/Procurement, IT, Leadership/C-level (17% each)
- Manufacturing**: IT, Finance/Procurement (73% each)
- Municipality**: Finance/Procurement (62%)
- Professional Services**: Leadership/C-level (80%)
- Real Estate & Infrastructure**: HR/People, Leadership/C-level (75% each)

- Clear differences by sector, with strongest collaboration typically either Leadership/C-level or Finance/Procurement, respectively.
- Notably, only 17% of respondents from the Government sector rated collaboration 'Very Strong/Strong' with any of the four departments - mostly collaboration was indicated as being limited.

# Challenges to Internal Collaboration

## What are the 3 biggest challenges when collaborating internally?



Collaboration can be challenging, and the survey indicates the most typical pitfalls that REFM organizations observe when seeking to collaborate with other departments internally.

Generally, there is no clear, overarching challenge for internal collaboration, as responses are rather evenly distributed.

Nonetheless, more than 50% of respondents indicate that allocating sufficient resources (55%) and defining a shared vision and ambition (53%) are amongst the top 3 biggest challenges.

Similarly, agreeing on a need for change (43%) and the responsibility and mandate (41%), are common challenges for many respondents.

Only 26% indicate, that it is a challenge to agree on the impact and value creation of REFM on employee experience.

## By Country

### What are the top 3 challenges?

(% of respondents ranking factor amongst top 3)

- Denmark**
1. Defining shared vision and ambition (55%)
  2. Allocating sufficient resources (53%)
  3. Getting leadership attention / buy-in (43%)

- Norway**
1. Allocating sufficient resources (59%)
  2. Defining shared vision and ambition (52%)
  3. Agreeing on need for change (43%)

- Sweden**
1. Defining shared vision and ambition, Allocating sufficient resources (52% each)
  2. Agreeing on responsibility and mandate, Getting leadership attention / buy-in (48% each)

- In all countries, allocating sufficient resources and defining a shared vision and ambition is one of the top challenges (between 48-59% of respondents in each country)
- Getting leadership attention and buy-in appears to be more of a challenge in Denmark and Sweden (43% and 48%, respectively) - in Norway, only 28% of respondents indicate that this is a challenge.

## By Sector

### What is the top challenge?

(Factor with the highest % of respondents ranking in top 3)

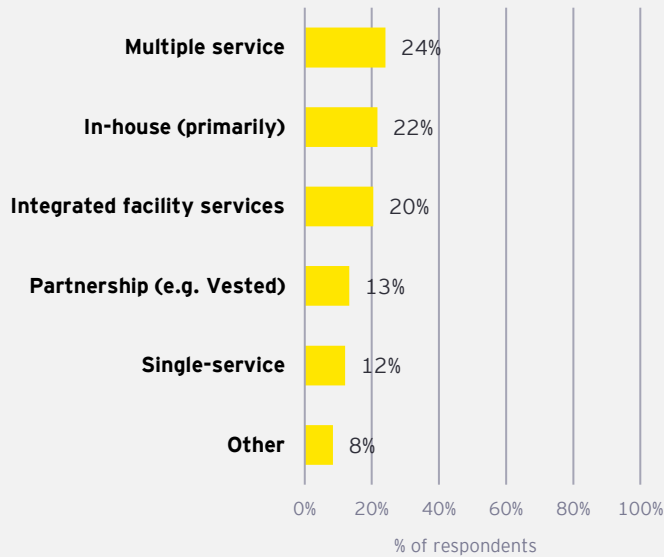
<b>Consumer Retail</b>	Defining shared vision and ambition, Allocating sufficient resources (30% each)
<b>Education</b>	Agreeing on responsibility and mandate (80%)
<b>Energy</b>	Agreeing on responsibility and mandate, Getting leadership attention/buy-in (50% each)
<b>Financial Services &amp; IT</b>	Defining shared vision and ambition (86%)
<b>FM Supplier</b>	Defining shared vision and ambition (54%)
<b>Government</b>	Allocating sufficient resources (80%)
<b>Manufacturing</b>	Getting leadership attention / buy-in (64%)
<b>Municipality</b>	Allocating sufficient resources (74%)
<b>Professional Services</b>	Agreeing on impact and value creation of REFM on employee experience (60%)
<b>Real Estate &amp; Infrastructure</b>	Allocating sufficient resources (50%)

- Dominant challenges appear in Education, Financial Services & IT, Government, and Municipality sectors - where +74% of respondents agree on one specific challenge being the top challenge.
- In other sectors there is larger variance in what is viewed as the top challenge(s).



# REFM Sourcing Strategy

## What is your main REFM sourcing strategy?



Across Scandinavia, the choice of REFM Sourcing Strategy varies - primarily between multiple service (24%), in-house (22%), and integrated facility services (20%).

Overall, 78% have outsourced FM services, as only 22% have a primarily in-house FM strategy.

A minority (12-13%) have adopted either a Partnership (e.g. Vested) or Single-service strategy.

## By Country

### What are top 3 sourcing strategies?

(% of respondents indicating given sourcing strategy)

- Denmark**
1. In-house (34%)
  2. Multiple service (22%)
  3. Partnership (e.g. Vested) (16%)

- Norway**
1. Multiple service (28%)
  2. Single-service (21%)
  3. In-house, Integrated facility services (17% each)

- Sweden**
1. Integrated facility service (41%)
  2. Multiple service (23%)
  3. Partnership (e.g. Vested) (18%)

- The choice of sourcing strategy varies within countries. No clear sourcing strategy emerges on a country-specific level.
- Sweden sees a relatively higher share of respondents that have an integrated facility service strategy (41%), while Denmark has a relatively high share of respondents with a predominantly in-house FM strategy (34%).

## By Sector

### What is the 'preferred' sourcing strategy?

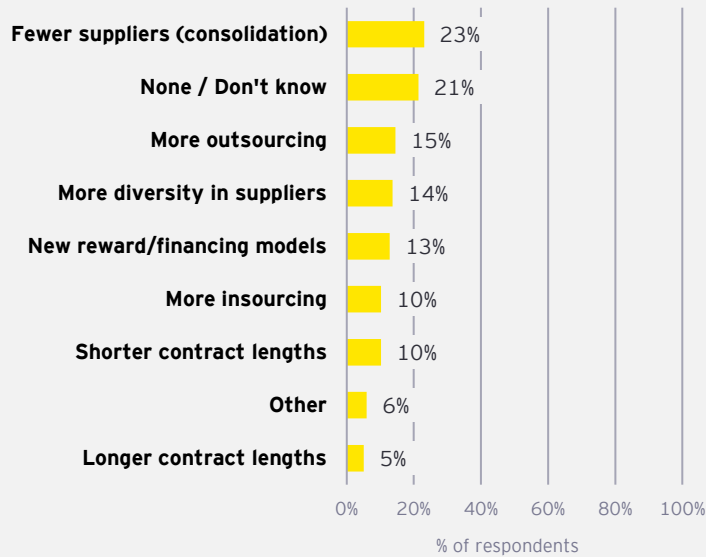
(Sourcing strategy with the highest % of respondents)

<b>Consumer Retail</b>	Multiple service, Integrated facility services, In-house, Partnership (e.g. Vested) (25% each)
<b>Education</b>	Multiple service (40%)
<b>Energy</b>	Partnership (e.g. Vested) (75%)
<b>Financial Services &amp; IT</b>	Integrated facility services (43%)
<b>FM Supplier</b>	N/A (not asked)
<b>Government</b>	Multiple service, Other (33% each)
<b>Manufacturing</b>	Multiple service, Integrated facility services, In-house, Other (18% each)
<b>Municipality</b>	Multiple service (26%)
<b>Professional Services</b>	In-house (60%)
<b>Real Estate &amp; Infrastructure</b>	In-house (50%)

- In most sectors, the choice of sourcing strategy varies - there is no dominant strategy.
- Nonetheless, two sectors show a tendency for one sourcing strategy to be preferred: Partnerships in Energy (75%), and In-house in Professional Services (60%).

# Strategic Change

## What changes to your FM strategy and operating model are you considering in the next 1-2 years?



The landscape of strategic change to operating models is broad and varied. No answer receives more than 23% of responses, which suggests that Scandinavian REFM organizations are considering very different changes to their strategy.

23% indicate that they will consolidate and reduce the number of suppliers, while 21% indicate they will not be making any change to their strategy in the next 1-2 years. 15% say they will be outsourcing more, while 14% will increase their portfolio of suppliers.

Only 10% and 5%, respectively, say they will be considering shorter or longer contract lengths. However, there are noticeable differences by country and sector.

### By Country

#### What are the top 3 strategic changes? (% of respondents indicating given strategic change)

- Denmark**
1. Fewer suppliers (33%)
  2. None (23%)
  3. More outsourcing (18%)

- Norway**
1. None (22%)
  2. More outsourcing (13%)
  3. More diversity in suppliers (13%)

- Sweden**
1. Fewer suppliers (33%)
  2. New reward/financing models (33%)
  3. None (22%)

- In all countries, about 1 in 5 (20%) of respondents say they will not make any significant change.
- In Denmark, 33% indicate that they will use fewer suppliers.
- In Norway, 13% say they will outsource more or use more suppliers.
- In Sweden, 33% indicate they will also consolidate the number of suppliers - and another 33% indicate they will define new reward/financing models.

### By Sector

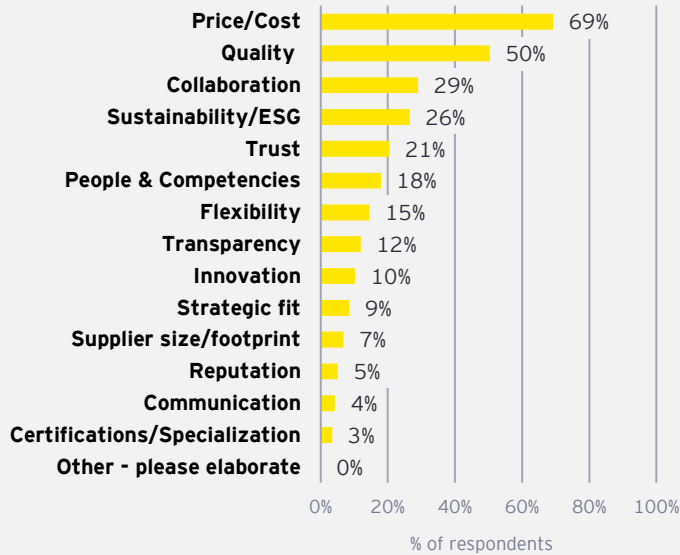
#### Is there a 'preferred' strategic change? (Strategic change with the highest % of respondents)

<b>Consumer Retail</b>	Shorter contract length, None (50% each)
<b>Education</b>	None (40%)
<b>Energy</b>	Fewer suppliers, None (50% each)
<b>Financial Services &amp; IT</b>	Fewer suppliers (57%)
<b>FM Supplier</b>	N/A (not asked)
<b>Government</b>	More insourcing (33%)
<b>Manufacturing</b>	Fewer suppliers, New reward/financing models (36% each)
<b>Municipality</b>	None (32%)
<b>Professional Services</b>	Fewer suppliers, More outsourcing, Shorter contract length (40% each)
<b>Real Estate &amp; Infrastructure</b>	Fewer suppliers, New reward/financing models (50% each)

- For most sectors, a small majority (36-57%) are considering supplier consolidation - or not making any changes at all.
- Consumer Retail and Professional Services are considering shorter contract lengths. Manufacturing and Real Estate & Infrastructure sectors say they are considering new reward/financing models.

# Supplier Selection

## What are the 3 most important criteria when evaluating and selecting an FM-supplier?



Money talks. A significant majority of respondents (69%) indicate that Price/Cost is one of the three most important criteria when evaluating and selecting an FM-supplier. The other major criterion is Quality, which 50% of Scandinavia REFM organizations say is in the top 3. This preference remains mostly the same across countries and sectors.

Besides those two criteria, the selection criteria for evaluating and selecting a supplier appears to vary. Between 18-29% of respondents indicate that either of the four criteria Collaboration (relationship), Sustainability/ESG, Trust, and People & Competencies are among their top 3 selection criteria.

## By Country

### What are the top 3 criteria?

(% of respondents indicating given criterion)

- Denmark**
1. Price/Cost (60%)
  2. Quality (45%)
  3. Collaboration (43%)

- Norway**
1. Price/Cost (83%)
  2. Quality (65%)
  3. Trust (28%)

- Sweden**
1. Price/Cost (70%)
  2. Quality, Collaboration (41% each)
  3. Sustainability (33%)

- In Denmark, a lower share of respondents (60%) indicate that Price/Cost is a top criteria compared to the other Scandinavian countries. Instead, Danish REFM organizations seem to value Collaboration highly (43%).
- In Norway, Price/Cost dominates (83%) together with Quality (65%). Besides those two factors, only Trust seems to matter somewhat (28%). All other factors are deemed to be less important, with fewer than 20% of respondents selecting them.
- In Sweden, Price/Cost is the most common criteria (70%), followed by Quality and Collaboration - similar to Denmark.

## By Sector

### What is the main evaluation/selection criterion?

(Criterion with highest % of respondents)

<b>Consumer Retail</b>	Price/Cost, People, Sustainability (50% each)
<b>Education</b>	Quality (80%)
<b>Energy</b>	Collaboration (100%)
<b>Financial Services &amp; IT</b>	Price/Cost, Strategic Fit, Flexibility (43% each)
<b>FM Supplier</b>	Price/Cost (79%)
<b>Government</b>	Price/Cost (67%)
<b>Manufacturing</b>	Price/Cost (64%)
<b>Municipality</b>	Price/Cost (88%)
<b>Professional Services</b>	Price/Cost, Trust (60% each)
<b>Real Estate &amp; Infrastructure</b>	Sustainability (75%)

- In most sectors, Price/Cost dominates as the most common criterion.
- However, some differences by sector appear: Consumer Retail and Real Estate & Infrastructure prioritize Sustainability. Education values Quality, while Energy values Collaboration highly.

A photograph showing a human hand on the left and a prosthetic hand on the right, both reaching towards the center. The background is a bright, modern interior with a large potted plant and a window. A yellow rectangular box is overlaid on the human hand.

# Innovative REFM

# Innovative REFM

## Summary of Findings

### Innovation Areas

There is a clear expectation to innovate REFM. In line with strategic priorities, 52% of respondents indicate that they will innovate around sustainability/ESG, and a further 48% will look to impact energy/electricity usage. 40% wish to innovate around digital & cybersecurity.

Across Scandinavia, respondents generally agree that more innovation is needed especially around 'hard' FM services like Waste Management, Maintenance, and Security (53-63%). Of the 'soft' FM services, office setup & furniture, cleaning, and meeting services are also deemed by respondents to have a need for innovation (50-59%). Looking across all FM service categories on average, 40% of respondents agree that innovation is needed to a large or some extent.

### Collaboration & Barriers

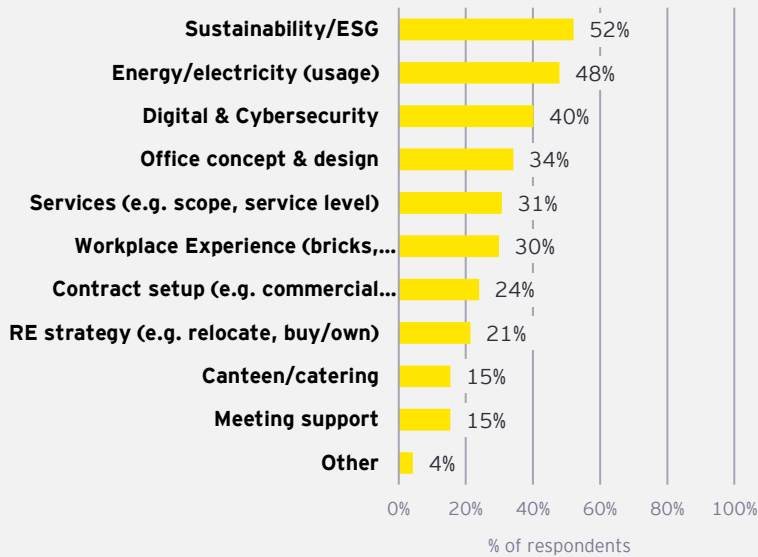
According to our respondents, the biggest barrier to innovation within REFM is conflicting interests (40%), e.g. having to reduce costs and secure revenue growth at the same time as innovating.

However, other barriers also matter. Between 30-35% of respondents indicate four barriers are a challenge: availability of resources, measurable impact, skills/capabilities and funding.

Related to conflicting interests is the challenge of working with others to create and implement innovation. 56% of respondents state that they partner internally for innovation, while 40% collaborate with external innovation-specific partners. 35% partner with their suppliers. It is least common (25%) to partner with customers to create new innovations.

# Innovation Areas

## What REFM areas will you innovate or improve on in the next 0-2 years?



There is an opportunity to innovate REFM. In line with strategic priorities, 52% of respondents indicate that they will innovate around sustainability/ESG, and a further 48% will look to impact energy/electricity usage. 40% wish to innovate around digital & cybersecurity.

Between 30-34% state that they will innovate on the Office concept & design, FM services, and Workplace Experience more broadly.

## By Country

### What are the top 3 innovation areas?

(% of respondents indicating given area)

- Denmark**
1. Sustainability/ESG (80%)
  2. Energy/electricity (usage) (70%)
  3. Digital & Cybersecurity (60%)

- Norway**
1. Energy/electricity (usage) (35%)
  2. Sustainability/ESG (33%)
  3. RE strategy (e.g., relocate, buy/own) (28%)

- Sweden**
1. Workplace Experience (bricks, bytes, behaviors) (59%)
  2. Sustainability/ESG (52%)
  3. Office concept & design (52%)

- In Denmark, there is broad consensus that innovation is required around Sustainability/ESG (80%), Energy/electricity consumption (70%), and Digital/cybersecurity (60%).
- In Norway, perspectives differ more, as the most popular innovation areas (Energy/electricity usage and Sustainability/ESG) receive 33-35% of responses.
- In Sweden, a majority (52-59%) will focus on innovating the Workplace Experience, Sustainability/ESG, and the Office concept & design.

## By Sector

### What is the main innovation area?

(Area with highest % of respondents)

<b>Consumer Retail</b>	Energy/electricity (usage) (75%)
<b>Education</b>	Sustainability/ESG, Digital & Cybersecurity (both 100%)
<b>Energy</b>	Workplace Experience (bricks, bytes, behaviours), Office concept & design, Sustainability/ESG (100% each)
<b>Financial Services &amp; IT</b>	Workplace Experience (bricks, bytes, behaviours), Office concept & design, Sustainability/ESG (86% each)
<b>FM Supplier</b>	Services (e.g. scope, service level) (50%)
<b>Government</b>	Services (e.g. scope, service level), Workplace Experience (bricks, bytes, behaviors), Sustainability/ESG, Digital & Cybersecurity, Energy/electricity (usage) (33% each)
<b>Manufacturing</b>	Sustainability/ESG (73%)
<b>Municipality</b>	Energy/electricity (usage) (50%)
<b>Professional Services</b>	Digital & Cybersecurity, Energy/electricity (usage) (50% each)
<b>Real Estate &amp; Infrastructure</b>	Sustainability/ESG (75%)

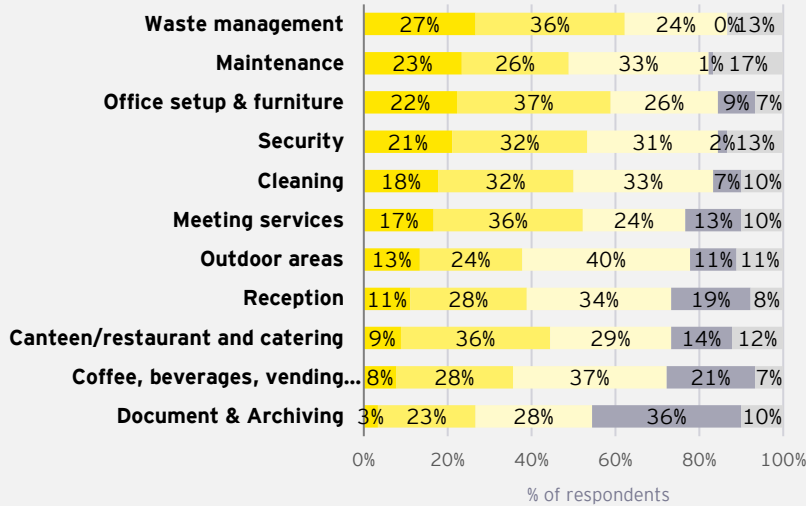
- Several sectors have one preferred innovation area, most often Sustainability/ESG and energy/electricity usage (Consumer Retail, Education, Manufacturing, Municipality, and Real Estate & Infrastructure).
- In other sectors, such as Energy, Financial Services & IT, and Government, several innovation areas are in focus.



# Service Areas

## Within which FM service area(s) do you see the strongest need for innovation?

■ To a large extent ■ To some extent ■ To less of an extent ■ Not at all ■ Don't know



There is also a need to innovate on existing FM Service areas. Across Scandinavia, respondents generally agree that more innovation is needed especially around 'hard' FM services like Waste Management, Maintenance, and Security (53-63%).

Of the 'soft' FM services, office setup & furniture, cleaning, and meeting services are also deemed to have a need for innovation by the respondents (50-59%).

Looking across all FM service categories on average, 40% of respondents agree that innovation is needed to a large or some extent. However, views on where innovation is needed vary by country and sector.

### By Country

#### Which FM service areas need innovation most? (% of respondents answering 'to a large extent')

- Denmark**
  1. Waste management (38%)
  2. Office setup & furniture (25%)
  3. Outdoor areas (20%)
- Norway**
  1. Maintenance (15%)
  2. Cleaning (13%)
  3. Waste management, Office setup & furniture (11% each)
- Sweden**
  1. Security (37%)
  2. Meeting Services (33%)
  3. Maintenance (30%)

- The countries each have very different views on where innovation is most needed.
- In Denmark, Waste Management and Office setup & furniture are the most popular categories (38% and 25%, respectively).
- In Norway, focus is on Maintenance and Cleaning, although only 13-15% agree innovation is needed 'to a large extent' - lower than the other countries.
- In Sweden, respondents say Security and Meeting services require most innovation (37% and 33%, respectively).

### By Sector

#### Which FM service areas need innovation most? (Highest % of respondents answering 'to a large extent')

- Consumer Retail** Security, Waste management (50% each)
- Education** Outdoor areas, Waste management (both 60%)
- Energy** Office setup & furniture (50%)
- Financial Services & IT** Security, Office setup & furniture (43% each)
- FM Supplier** Office setup & furniture (14%)
- Government** Maintenance, Waste management (both 33%)
- Manufacturing** Security (45%)
- Municipality** Cleaning (24%)
- Professional Services** Waste management (40%)
- Real Estate & Infrastructure** Maintenance, Outdoor areas (38% each)

- Views on where innovation is most needed vary distinctly by sector.
- In several sectors, however, over 40% of respondents agree innovation is needed 'to a large extent' in either Waste Management, Security, or Outdoor Areas (Consumer Retail, Education, Energy, Financial Services & IT, Manufacturing, Professional Services).

# Barriers to Innovation

## What are the 3 biggest barriers to innovation within FM?



Innovation can be challenging to both start on and deliver successfully, and the barriers are many.

According to our respondents, the biggest barrier is conflicting interests (40%), e.g. having to reduce costs and secure revenue growth at the same time - this can make it difficult to prioritize innovation.

However, other barriers also matter. Between 30-35% of respondents indicate four barriers: availability of resources, measurable impact, skills/capabilities and funding.

## By Country

### What are the top 3 innovation barriers? (% of respondents ranking barrier amongst top 3)

- Denmark**
    1. Skills/Capabilities (58%)
    2. Conflicting interests (48%)
    3. Measurable impact (43%)
  - Norway**
    1. Funding (43%)
    2. Availability of resources (41%)
    3. Skills/Capabilities, Conflicting interests (both 26%)
  - Sweden**
    1. Conflicting interests (59%)
    2. Measurable impact (41%)
    3. Leadership buy-in (37%)
- In Denmark, a majority agree that the greatest barriers are relevant Skills/Capabilities for innovation (58%) and Conflicting interests (48%).
  - In Norway, funding is the greatest barrier (43%) for many respondents as well as availability of resources (41%). These factors are not as prevalent in the other Scandinavian countries.
  - In Sweden, conflicting interest is the greatest barrier for 59%, followed by measurable impact (41%).

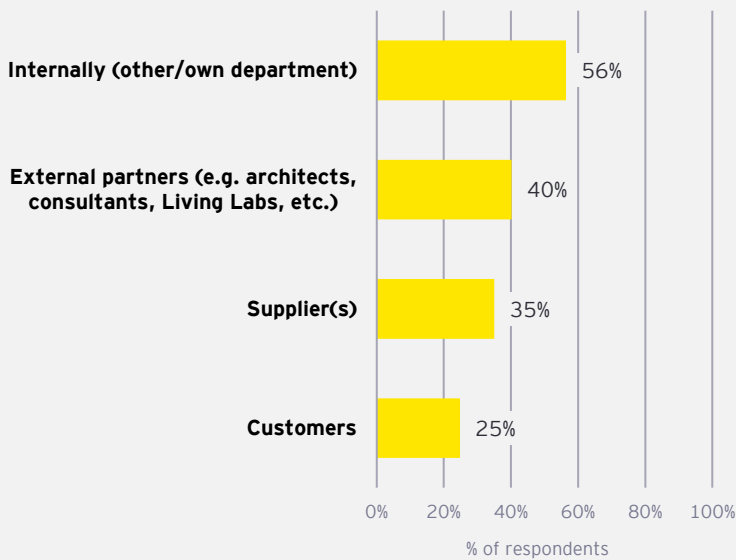
## By Sector

### What is the top innovation barrier? (Barrier with highest % of respondents)

- Consumer Retail**: Leadership buy-in (75%)
  - Education**: Conflicting interests, Funding, Skills/Capabilities (60% each)
  - Energy**: Conflicting interests, Skills/Capabilities (50% each)
  - Financial Services & IT**: Conflicting interests, Contract setup (57% each)
  - FM Supplier**: Conflicting interests (39% each)
  - Government**: Conflicting interests, Availability of resources (33% each)
  - Manufacturing**: Conflicting interests (82%)
  - Municipality**: Funding (53%)
  - Professional Services**: Availability of resources (80%)
  - Real Estate & Infrastructure**: Skills/Capabilities (75%)
- In several sectors, a consensus appears with a single barrier receiving 75% or more responses: Consumer Retail, Manufacturing, Professional Services, and Real Estate & Infrastructure.
  - In the other sectors, views are somewhat more varied with no single factor receiving more than 60% of sector responses.

# Innovation Partners

## Who do you partner with for innovation?



Innovation is about challenging convention. Typically, this requires collaboration with other parties, to inspire and implement new ideas and solutions.

56% of respondents state that they partner internally for innovation, while 40% collaborate with external innovation-specific partners (e.g. architects, consultants, etc.).

35% partner with their suppliers. It is least common (25%) to partner with customers to create new innovations.

## By Country

### Who are the most common innovation partners?

(% of respondents indicating given partner type)

- Denmark**
1. Internally (70%)
  2. Supplier(s) (58%)
  3. External partners (50%)

- Norway**
1. Internally (46%)
  2. External partners (33%)
  3. Customers (22%)

- Sweden**
1. Internally (63%)
  2. Supplier(s) (52%)
  3. External partners (44%)

- In all countries, internal collaboration is the most common partnership form, with between 46-70% of respondents indicating.
- In Denmark, at least 50% say they partner either internally, with external partners, or suppliers.
- In Norway, 46% partner internally, and an additional 33% collaborate with external partners.
- In Sweden, 62% seek internal partnerships for innovation and 52% partner with suppliers.

## By Sector

### Who is the main innovation partner?

(Partner type with highest % of respondents)

<b>Consumer Retail</b>	Internally, Supplier(s) (50% each)
<b>Education</b>	Internally (80%)
<b>Energy</b>	Supplier(s) (75%)
<b>Financial Services &amp; IT</b>	Supplier(s) (86%)
<b>FM Supplier</b>	Customers (61%)
<b>Government</b>	Internally, Supplier(s) (33% each)
<b>Manufacturing</b>	Internally (73%)
<b>Municipality</b>	Internally (62%)
<b>Professional Services</b>	Internally, Supplier(s) (60% each)
<b>Real Estate &amp; Infrastructure</b>	Internally (63%)

- For nearly all sectors, internal collaboration is the most popular form of innovation.
- Naturally, FM suppliers indicate they innovate mostly with Customers. A few sectors also indicate that they collaborate with their (FM) suppliers (Energy, Financial Services & IT, Government, and Professional Services).



# IT & Technology





# IT & Technology

## Summary of Findings

### IT Investment

72% of all respondents across Scandinavia say that they will increase their investment in IT and technology over the next 0-3 years. A full 33% say they will increase IT investments by over 10%. 24% indicate that their budget remains unchanged, and only 4% will reduce their IT-related budget and investments.

### Technology Solutions & User Needs

63% of respondents say they will invest in technology solutions to make REFМ smarter, for example using sensors to measure capacity, utilization, and condition. 51% indicate they will increase the level of self-service provided to employees (whether users and REFМ employees alike). 47% and 43%, respectively, indicate that they will digitalize and automate REFМ and offer more real-time analytics.

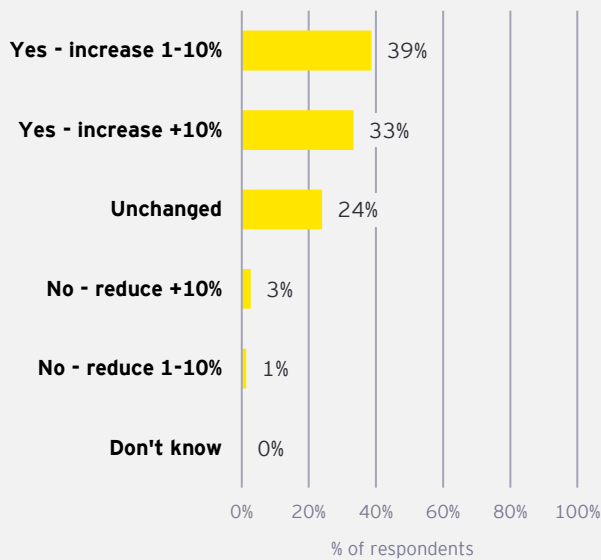
From a user perspective, 50% of surveyed REFМ organizations say they will invest in technology to host online/meetings, and in technology to help find meeting rooms. 27-35% of respondents also indicate that they will invest in technology to monitor the workplace environment and implement technology to support employees in requesting help/support, booking a desk/workstation, or ordering services. However, currently, only 41% of surveyed organizations provide education and training for employees - and an additional 18% say they will in the future.

### Technology Challenges

Generally, REFМ organizations indicate that they face several challenges with regard to technology. Across Scandinavia, 57% of respondents indicate that limited budgets hamper technology implementation and innovation. 50% of surveyed REFМ organizations also say integrating different data makes the process complicated and expensive. 41% indicate that the lack of ownership/mandate for IT solutions is a challenge; and 36% who ascribe of innovation competencies or skills within REFМ.

# IT Investment

**Do you expect to invest more in IT and technology to improve the FM service experience in the next 0-3 years?**



IT is increasingly on the agenda of REF M organizations, and digitalization is a key strategic priority.

72% of all respondents say that they will increase their investment in IT and technology over the next 0-3 years. A full 33% say they will increase IT investments by over 10%.

24% indicate that their budget remains unchanged, and only 4% will reduce their IT-related budget and investments.

## By Country

**How will IT investments change?**  
(% of respondents indicating given response)

- Denmark**
1. Yes - increase 1-10% (42%)
  2. Yes - increase +10% (32%)
  3. Unchanged (19%)

- Norway**
1. Unchanged (46%)
  2. Yes - increase +10% (29%)
  3. Yes - increase 1-10% (25%)

- Sweden**
1. Yes - increase 1-10% (50%)
  2. Yes - increase +10% (40%)
  3. Unchanged, No - reduce 1-10% (5% each)

- In Denmark, 74% will increase the level of IT investment - 32% by more than 10%.
- In Norway, only 54% will increase investment levels - a full 46% will keep their planned IT budgets unchanged.
- In Sweden, a significant majority (90%) of respondents state that they will increase IT investments, with 40% saying they will do so by more than 10%.

## By Sector

**What is the most common IT investment strategy?**  
(Answer with highest % of respondents)

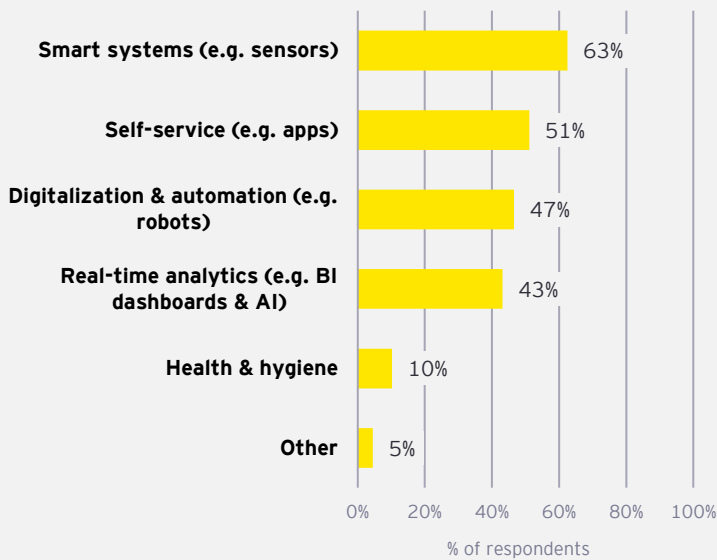
<b>Consumer Retail</b>	Yes - increase +10%, Yes - increase 1-10%, Unchanged (33% each)
<b>Education</b>	Yes - increase +10% (60%)
<b>Energy</b>	Yes - increase 1-10% (67%)
<b>Financial Services &amp; IT</b>	Yes - increase 1-10%, Unchanged (40% each)
<b>FM Supplier</b>	Yes - increase +10% (71%)
<b>Government</b>	Yes - increase 1-10%, Unchanged, No - reduce 1-10%, No - reduce +10% (25% each)
<b>Manufacturing</b>	Yes - increase 1-10% (88%)
<b>Municipality</b>	Unchanged (43%)
<b>Professional Services</b>	Yes - increase +10% (50%)
<b>Real Estate &amp; Infrastructure</b>	Yes - increase 1-10% (60%)

- Education, FM Suppliers, and Professional services appear most ambitious - a majority of respondents indicating a +10% increase in IT investments.
- The public sector (Government and Municipality) and Consumer Retail sectors generally appear to limit investment, with many answering Unchanged.



# Technology Solutions

Which technology solutions will you invest in, in order to improve the employee experience in the next 0-3 years?



Technology can support REFM organizations in optimizing processes, increasing efficiency and, not least, improving the employee experience.

Indeed, the future of REFM is 'Smart' - 63% of respondents say they will invest in technology solutions to make REFM smarter, for example using sensors to measure capacity, utilization, and condition.

51% indicate they will increase the level of self-service provided to employees (whether users and REFM employees alike). 47% and 43%, respectively, indicate that they will digitalize and automate REFM and offer more real-time analytics.

## By Country

What are the top 3 technology solutions?  
(% of respondents indicating solution)

- Denmark**
  - Smart systems (58%)
  - Real-time analytics (48%)
  - Self-service (45%)
- Norway**
  - Smart systems (37%)
  - Digitalization & automation (35%)
  - Self-service (33%)
- Sweden**
  - Smart systems (56%)
  - Self-service (44%)
  - Digitalization & automation (37%)

- In all Scandinavian countries, Smart systems is the most prevalent answer, with between 37-58% of respondents indicating this solution per country. All countries also indicate a preference for self-service solutions (33-45%).
- In Denmark, there is greater interest in real-time analytics, while in Norway and Sweden digitalization and automation is a more common solution to invest in.

## By Sector

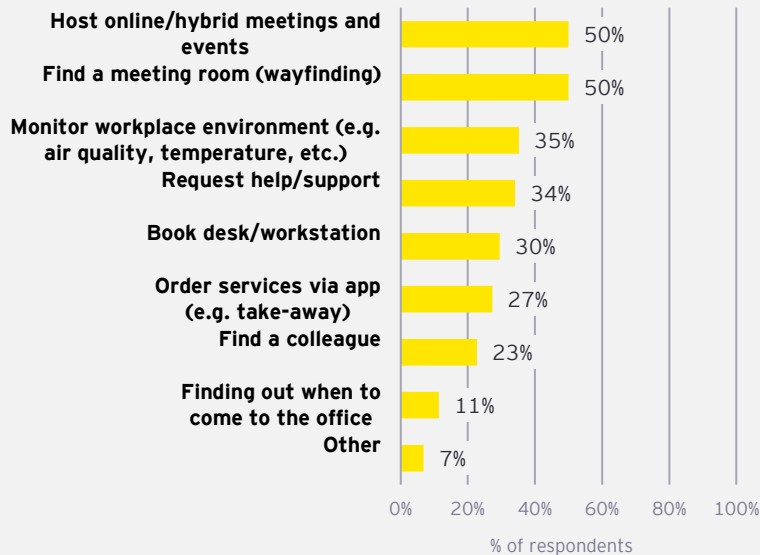
What is the main technology solution?  
(Solution with highest % of respondents)

<b>Consumer Retail</b>	Smart systems, Self-service (50% each)
<b>Education</b>	Smart systems (100%)
<b>Energy</b>	Smart systems (100%)
<b>Financial Services &amp; IT</b>	Smart systems, Self-service, Real-time analytics (71% each)
<b>FM Supplier</b>	Self-service, Digitalization & automation (46% each)
<b>Government</b>	Smart systems (33%)
<b>Manufacturing</b>	Real-time analytics (45%)
<b>Municipality</b>	Smart systems (47%)
<b>Professional Services</b>	Self-service, Real-time analytics (60% each)
<b>Real Estate &amp; Infrastructure</b>	Smart systems (50%)

- In the Education, Energy, and Financial Services & IT sectors a significant majority (+71%) indicate that they will invest in Smart systems.
- For other sectors, there is less clear consensus, with a large group of respondents (33-50%) indicating a preference for one or two technology solutions.

# Employee Needs

**When investing in IT for a great workplace experience, which employee needs and activities do you support?**



For many organizations, the way of working is increasingly digital, diverse, and flexible. In this regard, technology plays a role in improving employees' workplace experience.

For REFM organizations, there is a focus on supporting the meeting experience: 50% will invest in technology to host online/meetings, and in technology to help find meeting rooms.

27-35% of respondents also indicate that they will invest in technology to monitor the workplace environment and implement technology to support employees in requesting help/support, booking a desk/workstation, or ordering services.

Only a small group of respondents (11%) will invest in technologies to help employees determine when to come to the office.

## By Country

**What are the top 3 user needs?**

(% of respondents indicating given user need)

- Denmark**
    - Host online/hybrid meetings and events (67%)
    - Find a meeting room (wayfinding) (61%)
    - Monitor workplace environment (e.g. air quality, temperature, humidity, etc.) (44%)
  - Norway**
    - Monitor workplace environment (e.g. air quality, temperature, humidity, etc.) (31%)
    - Find a meeting room (wayfinding), Request help/support (21% each)
    - Book desk/workstation, Host online/hybrid meetings and events (17% each)
  - Sweden**
    - Find a meeting room (wayfinding) (70%)
    - Host online/hybrid meetings and events (65%)
    - Request help/support (52%)
- In Denmark, a majority (61-67%) of respondents will invest in technology for better online/hybrid meetings and wayfinding to meeting rooms.
  - In Norway, each respondent generally indicates that they will invest in fewer technology areas compared to Danish and Swedish respondents. The most popular investment (31%) is in technology to monitor the workplace environment.
  - In Sweden, like Denmark, most respondents (65-70%) will invest in better meeting experiences (online/hybrid and wayfinding).

## By Sector

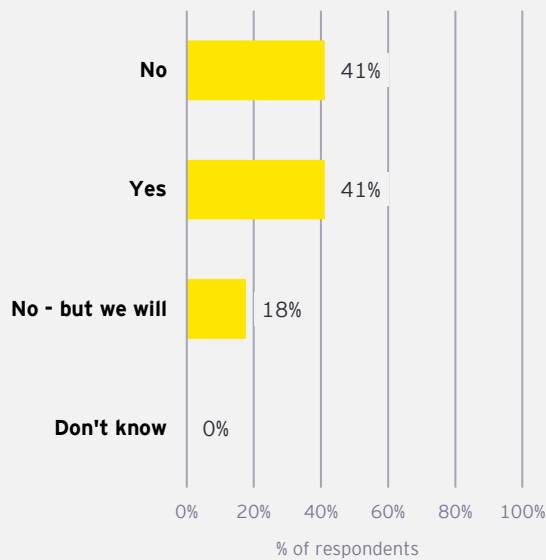
**What is the main user need?**

(User need with highest % of respondents)

- Consumer Retail** Book desk/workstation, Find a meeting room (wayfinding), Order services via app, Host online/hybrid meetings and events, Monitor workplace environment (33% each)
  - Education** Find a meeting room (wayfinding), Host online/hybrid meetings and events (80% each)
  - Energy** Find a meeting room (wayfinding) (100%)
  - Financial Services & IT** Find a meeting room (wayfinding), Order services via app (83% each)
  - FM Supplier** Request help/support (56%)
  - Government** Host online/hybrid meetings and events (50%)
  - Manufacturing** Host online/hybrid meetings and events (80%)
  - Municipality** Find a meeting room (wayfinding) (35%)
  - Professional Services** Host online/hybrid meetings and events (75%)
  - Real Estate & Infrastructure** Find a meeting room (wayfinding), Host online/hybrid meetings and events (57% each)
- In Education, Energy, Financial Services & IT Manufacturing, Professional Services there is a clear preference (>80%) to invest in finding a meeting room or hosting online/hybrid meetings.
  - In other sectors, the main user need to be invested in varies, with between 33-57% of respondents indicating the same preference.

# Training of Employees

## Do you educate/train employees in how best to use workplace services and technology?



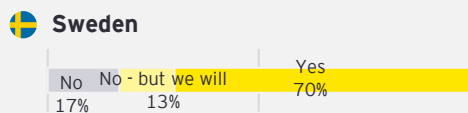
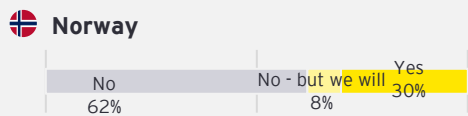
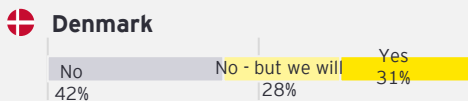
Employees and organizations increasingly adopt and apply technology as they adapt to new ways of working. Often, a certain period of adoption is required to introduce and acquaint users to new technologies and solutions.

With REFM increasingly becoming digital, there is a need to ensure employees are informed and trained in how to use workplace services and technology

However, only 41% of surveyed organizations do provide education and training for employees - and an additional 18% say they will in the future. The remaining 41% say that they do not currently - and will not in the future.

### By Country

#### How many educate employees? (% of respondents by answer given)



- In Sweden, a majority (71%) say they educate employees today. In Denmark and Norway, only 31% of respondents say they do so.
- However, in Denmark, another 28% say they will do so in the future, while in Norway and Sweden only 8% and 13% say the same.

### By Sector

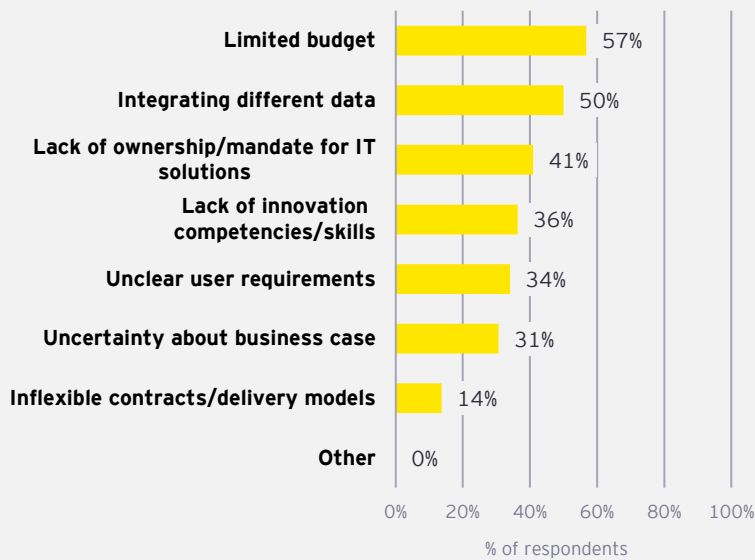
#### What is the most common approach? (Answer with highest % of respondents)

<b>Consumer Retail</b>	No (67%)
<b>Education</b>	Yes, No - but we will (40% each)
<b>Energy</b>	Yes (75%)
<b>Financial Services &amp; IT</b>	No - but we will (50%)
<b>FM Supplier</b>	No (61%)
<b>Government</b>	Yes (75%)
<b>Manufacturing</b>	Yes (70%)
<b>Municipality</b>	No (48%)
<b>Professional Services</b>	No - but we will (50%)
<b>Real Estate &amp; Infrastructure</b>	Yes, No (43% each)

- The Energy, Government and Manufacturing sectors are particularly good at educating employees today (+70%); to some extent also Education and Real Estate & Infrastructure (40-43%).
- In Education, Financial Services & IT, and Professional Services, a significant share (40-50%) of respondents intend to educate employees in the future.

# Technology Challenges

## What are the 3 biggest challenges to increasing technology implementation and innovation within REFMs?



Digitalization is a key strategic priority for REFMs, and yet successful technology innovation and implementation is challenging for many.

The challenges faced are also many - with no one challenge clearly more common than others. Across Scandinavia, 57% indicate that limited budgets hamper technology implementation and innovation; 50% also say integrating different data makes the process complicated and expensive.

41% of surveyed REFMs organizations indicate that the lack of ownership/mandate for IT solutions is a challenge; supported by 36% who note a lack of innovation competencies or skills within REFMs.

### By Country

#### What are the top 3 challenges?

(% of respondents indicating given challenge)

- Denmark**
1. Uncertainty about business case, Integrating different data (47% each)
  2. Lack of ownership/mandate for IT solutions (44%)
  3. Limited budget (39%)

- Norway**
1. Limited budget (79%)
  2. Lack of innovation competencies/skills (66%)
  3. Integrating different data (45%)

- Sweden**
1. Integrating different data (52%)
  2. Limited budget (48%)
  3. Unclear user requirements, Lack of ownership/mandate for IT solutions (37% each)

- In Denmark, the top challenges primarily relate to uncertainty around business case, integrating different data, and a lack of ownership/mandate for IT solutions (47-44%). Limited budget is less of an issue than in other countries (39%).
- In Norway, budget limitations are the main challenge (79%), together with a lack of innovation competencies/skills (66%).
- In Sweden, integrating different data is the most common challenge (52%) together with a limited budget (48%).


### By Sector

#### What is the main challenge?

(Challenge with highest % of respondents)

- |                                         |                                                                                                                                                      |
|-----------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Consumer Retail</b>                  | Limited budget, Integrating different data, Lack of ownership/mandate for IT solutions (67% each)                                                    |
| <b>Education</b>                        | Limited budget (80%)                                                                                                                                 |
| <b>Energy</b>                           | Limited budget, Integrating different data, Lack of ownership/mandate for IT solutions (50% each)                                                    |
| <b>Financial Services &amp; IT</b>      | Lack of innovation competencies/skills, Unclear user requirements, Integrating different data, Lack of ownership/mandate for IT solutions (50% each) |
| <b>FM Supplier</b>                      | Integrating different data (56%)                                                                                                                     |
| <b>Government</b>                       | Limited budget (50%)                                                                                                                                 |
| <b>Manufacturing</b>                    | Integrating different data (60%)                                                                                                                     |
| <b>Municipality</b>                     | Limited budget (81%)                                                                                                                                 |
| <b>Professional Services</b>            | Uncertainty about business case, Integrating different data (75% each)                                                                               |
| <b>Real Estate &amp; Infrastructure</b> | Unclear user requirements (71%)                                                                                                                      |
- For many sectors, limited budget is the most common challenge.
  - However, for FM Suppliers, Manufacturing and Professional Services, the challenge is integrating different data.





# Flexible Ways of Working



# Flexible Ways of Working

## Summary of Findings

### Flexibility in where we work

63% of respondents indicate that employees on average work from home between 1-3 days/week - in line with other similar industry surveys and benchmarks that EY has conducted globally.

Sweden appears to work from home the most (41% say 3 days/week), while Norway the least (64% say 0 days/week). Employees in Denmark work from home 1 day/week (44%)

77% of respondents say their organization allows employees to work remotely at least 1 day/week - while 18% state that their organization does not permit remote work at all (0 days/week). The majority (70%) have not defined set days for when employees should be in the office.

For 29% of respondents, the degree of flexible working is decided on in agreement between manager and employee. A further 56% of respondents indicate that the decision is made by either the corporate/organization policy, department/business area, or line manager/team leader. 73% of respondents agree that the flexibility to work from home is important or very important for recruiting and retaining employees.

### Office Presence

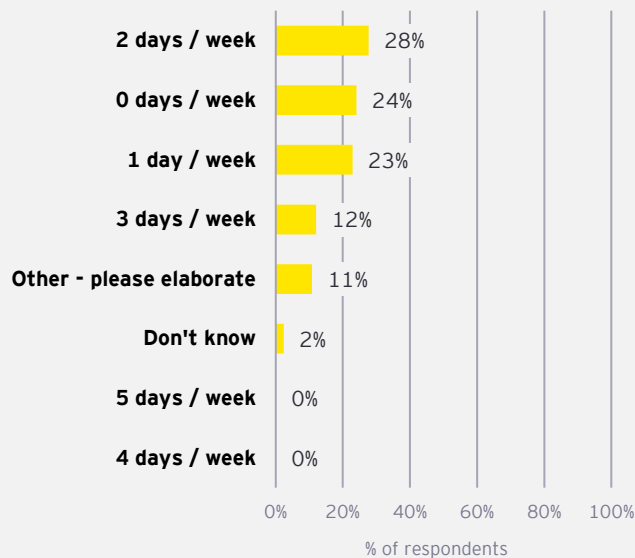
On average, respondents estimate that 54% of employees are in the office on a given workday, however this varies by sector and country. In particular, Swedish respondents report noticeably lower office presence levels than Norway and Denmark, in line with findings of how often employees work from home. Across Scandinavia, 75% of respondents report that less than 76% of employees are in the office on average.

66% of respondents agree that the number of employees in the office has decreased since the pandemic - a full 35% state that office presence has decreased by at least 16%. Over 70% of respondents agree that the most 'popular' days in the office are Tuesday, Wednesday, and Thursday. However, only 42% currently measure building and desk occupancy.



# Working from Home

On average, how often do employees in your organization/company work from home?



For many employees and employers, the pandemic proved that some work activities can be performed outside the office. As a result, several employees can benefit from increased flexibility in where they work.

63% of respondents indicate that employees on average work from home between 1-3 days/week - in line with other similar industry surveys and benchmarks.

24% of respondents, however, indicate that employees work from home 0 days/week - while none work from home 4 or 5 days/week.

## By Country

How often do employees work from home?  
(% of respondents indicating given answer)

- Denmark**
- 1 day / week (44%)
  - 2 days / week (38%)
  - Other (13%)

- Norway**
- 0 days / week (62%)
  - 1 day / week (14%)
  - 2 days / week (10%)

- Sweden**
- 3 days / week (41%)
  - 2 days / week (36%)
  - Other (14%)

- There are noticeable differences between countries, in terms of how often employees tend to work from home.
- In Denmark, a large share of respondents (44%) indicate that employees on average work 1 day/week from home.
- In Norway, most respondents (86%) indicate that employees on average work between 0-2 days/week from home. A majority (62%) do not work from home.
- In Sweden, most respondents (41%) indicate that they on average work 3 days/week from home, the highest number compared to the other Scandinavian countries.

## By Sector

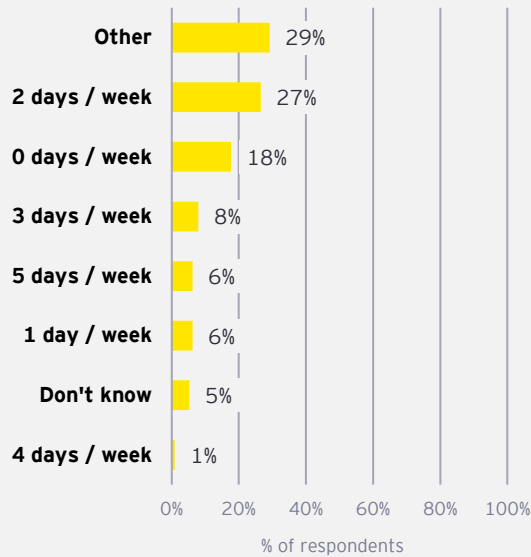
How often do employees work from home?  
(Answer with highest % of respondents)

- Consumer Retail** 1 day / week, 2 days / week (50% each)
- Education** 1 day / week (60%)
- Energy** 2 days / week, 3 days / week (50% each)
- Financial Services & IT** 2 days / week (57%)
- FM Supplier** 0 days / week, 2 days / week, 3 days / week, Other (4% each)
- Government** Other (33%)
- Manufacturing** 2 days / week (45%)
- Municipality** 0 days / week (50%)
- Professional Services** 2 days / week (40%)
- Real Estate & Infrastructure** 1 day / week, 2 days / week (38% each)

- In most sectors, 2 days/week is the most common number of days to work from home.
- However, some differences by sector appear: FM Supplier and Municipality spend on average 0 days/week working from home.

# Flexible Working Policy (1)

How many days a week does your organization allow employees to work remote/from elsewhere?



Many organizations in both the private and public sector have defined policies and guidelines for flexible working, i.e. where and when work is performed.

Overall, 77% of respondents say their organization allows employees to work remotely at least 1 day/week. Only 18% state that employees are not permitted to work from elsewhere (0 days/week).

29% of respondents indicate the organization's flexible working policy is Other. Typically, this answer was chosen because there is no set number of days defined, it is up to the nearest manager/leader to determine based on need. Another 27% of respondents say their organization allows employees to work remotely 2 days/week.

## By Country

What are the most common number of days?  
(% of respondents indicating given answer)

- Denmark**
1. Other (33%)
  2. 2 days / week (30%)
  3. 1 day / week (13%)

- Norway**
1. 0 days / week (41%)
  2. 2 days / week, Other (22% each)
  3. Don't know (7%)

- Sweden**
1. Other (37%)
  2. 2 days / week (30%)
  3. 3 days / week (22%)

- In Denmark, 33% indicate Other. The 'other' response typically means the number of days is not defined, but dependent on need/manager's discretion.
- In Norway, 0 and 2 days / week are the most common responses (41% and 22%, respectively).
- In Sweden, Other is the most common response (37%), slightly higher than in the other Scandinavian countries.

## By Sector

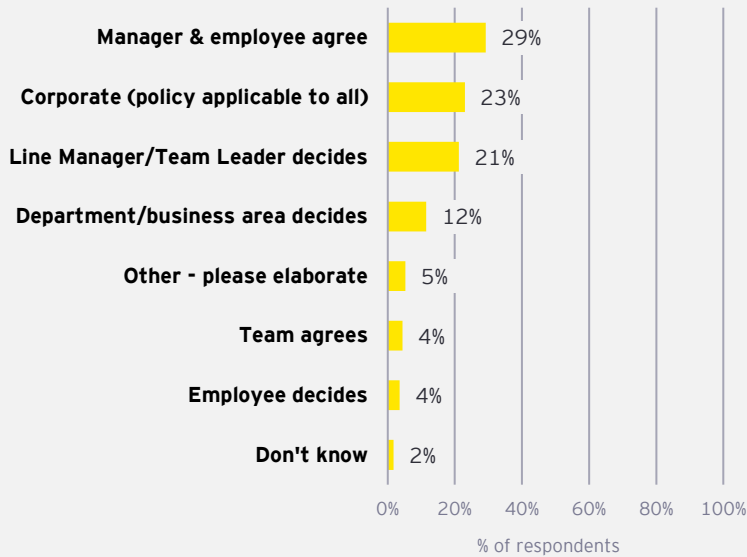
What is the most common policy?  
(Answer with highest % of respondents)

<b>Consumer Retail</b>	2 days / week (50%)
<b>Education</b>	1 day / week (60%)
<b>Energy</b>	Other (50%)
<b>Financial Services &amp; IT</b>	2 days / week, 3 days / week (43% each)
<b>FM Supplier</b>	Other (36%)
<b>Government</b>	Other (50%)
<b>Manufacturing</b>	Other (55%)
<b>Municipality</b>	0 days / week (41%)
<b>Professional Services</b>	5 days / week, Other (40% each)
<b>Real Estate &amp; Infrastructure</b>	2 days / week (63%)

- In a number of sectors, Other is the most common response, because the organization's policy does not define a set number of days.
- However, some differences by sector appear: a majority of the responses from the Municipality sector respond 0 days / week, and 1 day/week in the Education sector.

## Flexible Working Policy (2)

### Who decides how much an employee works remote/from home?



Many Scandinavian organizations have set guidelines and policies to create some form of predictability and structure around flexible working.

A majority of the respondents (29%) indicate that the working policy is based on the manager and employee agreeing.

56% of respondents indicate that the decision is made by either the corporate/organization policy, department/business area, or line manager/team leader.

Only 4% of the respondents indicate that the employee has the complete flexibility to themselves determine how much to work remotely.

### By Country

#### Who decides regarding remote work?

(% of respondents indicating given decision-maker)



#### Denmark

1. Manager & employee agree (33%)
2. Line Manager/Team Leader decides (23%)
3. Corporate (policy applicable to all) (20%)



#### Norway

1. Line Manager/Team Leader decides, Manager & employee agree (24% each)
2. Corporate (policy applicable to all) (22%)
3. Department/business area decides (20%)



#### Sweden

1. Manager & employee agree (33%)
2. Corporate (policy applicable to all) (30%)
3. Line Manager/Team Leader decides (15%)

- Generally, no clear consensus emerges in each country – policies and decision-making varies, as no answer has more than 33% of responses.
- In Denmark, a larger share of respondents (33%) indicate that Manager & employee agrees on how much to work remotely.
- In Norway, 20% of the respondents respond that Department/business area decides.
- In Sweden, it is most common for either the manager & employee to agree directly (33%), or for there to be a corporate policy applicable to all (30%).

### By Sector

#### Who decides regarding remote work?

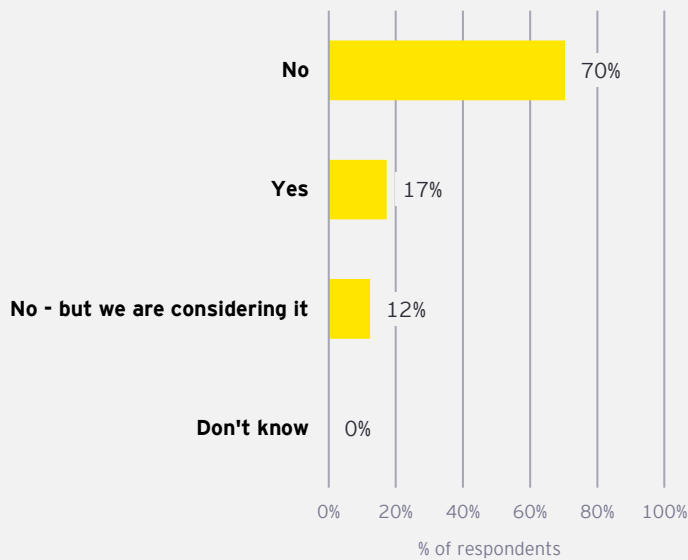
(Decision-maker with highest % of respondents)

<b>Consumer Retail</b>	Corporate (policy applicable to all) (50%)
<b>Education</b>	Corporate (policy applicable to all), Line Manager/Team Leader decides (40% each)
<b>Energy</b>	Corporate (policy applicable to all), Line Manager/Team Leader decides, Manager & employee agree, Other (25% each)
<b>Financial Services &amp; IT</b>	Manager & employee agree (57%)
<b>FM Supplier</b>	Corporate (policy applicable to all) (32%)
<b>Government</b>	Department/business area decides, Manager & employee agree (33% each)
<b>Manufacturing</b>	Manager & employee agree (45%)
<b>Municipality</b>	Manager & employee agree (29%)
<b>Professional Services</b>	Manager & employee agree (60%)
<b>Real Estate &amp; Infrastructure</b>	Line Manager/Team Leader decides (63%)

- In most sectors, it is the Manager and employee who agree and decide on how much to work remotely. In certain sectors (e.g. Consumer Retail, Education, Energy and FM Suppliers) it is a corporate policy that applies to all.

# Policy on Office Presence

**Do you require that all employees come to the office on specific (set) days of the week?**



Although office presence is unpredictable, only 17% of the organization surveys have opted to require that employees come in on specific/set days of the week. 70% of respondents say they do not require employees to come in on set days.

However, 12% of respondents are considering defining set days where employees must come to the office.

## By Country

**Is office presence required on specific days?**  
(% of respondents indicating given response)

- Denmark**
  1. No (78%)
  2. No - but we are considering it (13%)
  3. Yes (9%)

- Norway**
  1. No (52%)
  2. Yes (33%)
  3. No - but we are considering it (15%)

- Sweden**
  1. No (82%)
  2. Yes, No - but we are considering it (9% each)
  3. Don't know (0%)

- In Denmark and Sweden, a clear consensus emerges where 78-82% do not require employees to come in on specific days.
- In Norway, 52% say the same. However, 33% respondents state that they do require employees to come to the office on specific days - the highest share amongst the Scandinavian countries.

## By Sector

**Is office presence required on specific days?**  
(Response with highest % of respondents)

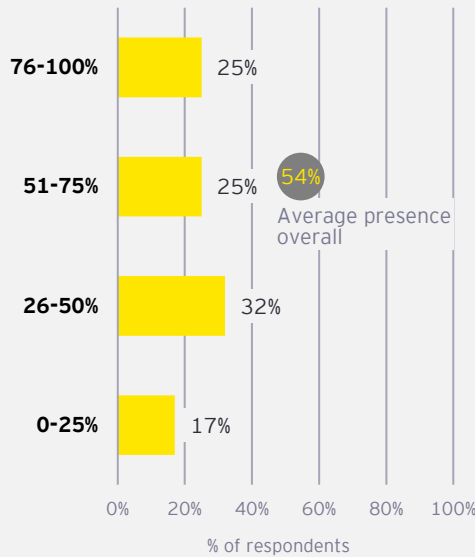
<b>Consumer Retail</b>	No (75%)
<b>Education</b>	No - but we are considering it, No (50% each)
<b>Energy</b>	No (75%)
<b>Financial Services &amp; IT</b>	No (86%)
<b>FM Supplier</b>	No (50%)
<b>Government</b>	No (67%)
<b>Manufacturing</b>	No (80%)
<b>Municipality</b>	No (62%)
<b>Professional Services</b>	No (100%)
<b>Real Estate &amp; Infrastructure</b>	No (75%)

- In a majority of the sectors, the most common answer is that no specific day is required.
- Only in Education is there a notable share who are considering requiring employees to come in on fixed days.



# Office Presence (1)

**On average, what % of employees are in the office on a given workday?**



Office presence has clearly changed, as it is no longer the place we work every day, and because employees tend to work from home between 1-3 days/week.

On average, our respondents indicate that 54% of employees are in the office on an average/given workday.

However, as the results show there is quite some variation, as with between 17-32% of respondents indicating the given range.

Remarkably, 75% say office presence is on average below 75%.

## By Country

**What is the range of office presence?**

(Top 3 by % of respondents indicating given presence)

- Denmark**
1. 26-50% (48%)
  2. 51-75% (36%)
  3. 76-100% (16%)

- Norway**
1. 76-100% (42%)
  2. 0-25% (32%)
  3. 51-75% (16%)

- Sweden**
1. 26-50% (50%)
  2. 51-75% (29%)
  3. 0-25% (13%)

- In all countries, there is a large variation in perceived office presence.
- In Denmark, 48% state that 26-50% of employees are in the office on a given weekday. A further 36% claim 51-75% office presence.
- In Norway, 42% state that 76-100% of employees are in the office on a given weekday. This is the highest office presence amongst the Scandinavian countries
- In Sweden, like Denmark, 50% state that 26-50% of employees are in the office on a given weekday. A further 29% claim 51-75% office presence.

## By Sector

**Which level of office presence is most common?**

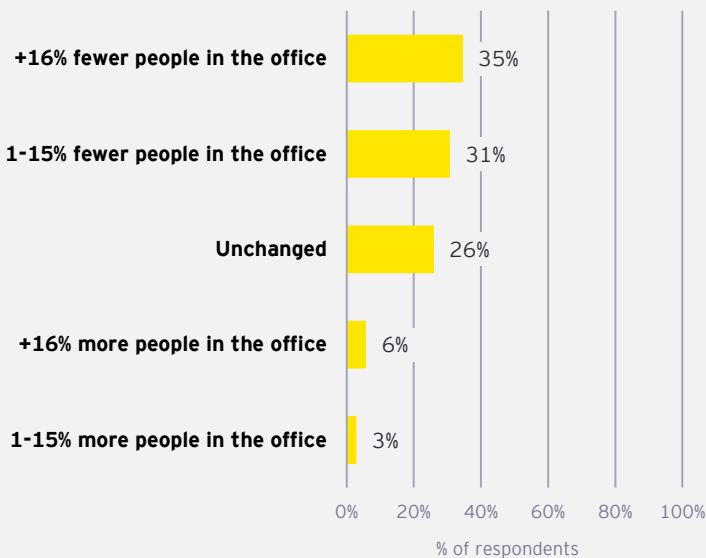
(Range with highest % of respondents)

<b>Consumer Retail</b>	51-75%, 76-100% (50% each)
<b>Education</b>	76-100% (67%)
<b>Energy</b>	26-50% (75%)
<b>Financial Services &amp; IT</b>	26-50% (57%)
<b>FM Supplier</b>	26-50% (33%)
<b>Government</b>	0-25%, 26-50%, 51-75% (33% each)
<b>Manufacturing</b>	51-75% (60%)
<b>Municipality</b>	76-100% (39%)
<b>Professional Services</b>	26-50% (67%)
<b>Real Estate &amp; Infrastructure</b>	76-100% (40%)

- Generally, two key trends appear: certain sectors with a presence around 26-50% (Energy, Financial Services & IT, FM Suppliers, Government, and Professional Services); and certain sectors with a presence of between 76-100% (Consumer Retail, Education, Municipality, and Real Estate & Infrastructure).

## Office Presence (2)

On average, how has office occupancy changed after the pandemic?



Respondents indicate that, on average, 54% of employees were present in the office on a given workday - though with large degrees of variation, also by industry and sector.

However, in terms of the change post-pandemic, there is a greater consensus: two-thirds (66%) of our respondents agree that the number of employees in the office has decreased - a full 35% say by at least 16%.

Conversely, only 9% state that the level of office presence has increased since the pandemic.

There are, however, noticeable difference by country and sector as to how much office presence has changed.

### By Country

What are the top 3 changes to office presence?

(% of respondents indicating given change)

- Denmark**
- +16% fewer people in the office, 1-15% fewer people in the office (42% each)
  - Unchanged (11%)
  - 1-15% more people in the office, +16% more people in the office (3% each)

- Norway**
- Unchanged (53%)
  - 1-15% fewer people in the office (26%)
  - +16% more people in the office (9%)

- Sweden**
- +16% fewer people in the office (72%)
  - 1-15% fewer people in the office (24%)
  - +16% more people in the office (4%)
- In Denmark, the consensus is that there are fewer people in the office, 84% of respondents saying office presence has declined by either +16% or 10-15% (42% each).
  - In Norway, the majority (53%) indicate that office presence is unchanged - the highest amongst all Scandinavian countries. Similarly, some Norwegian respondents indicate that there are significantly more people in the office (9%).
  - In Sweden, a significant majority (72%) respond that there are +16% fewer employees in the office. This is the highest of all the Scandinavian countries, and in line with other findings.

### By Sector

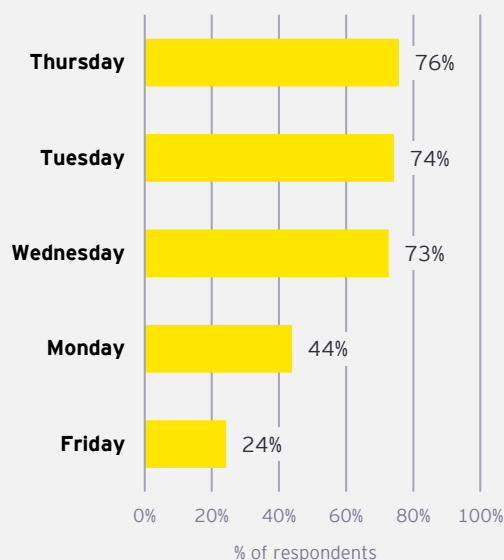
What is biggest change to office presence?

(Change estimate with highest % of respondents)

- |                                         |                                                                                                                          |
|-----------------------------------------|--------------------------------------------------------------------------------------------------------------------------|
| <b>Consumer Retail</b>                  | 1-15% fewer people in the office (75%)                                                                                   |
| <b>Education</b>                        | 1-15% fewer people in the office (60%)                                                                                   |
| <b>Energy</b>                           | +16% fewer people in the office (100%)                                                                                   |
| <b>Financial Services &amp; IT</b>      | +16% fewer people in the office (71%)                                                                                    |
| <b>FM Supplier</b>                      | +16% fewer people in the office, Unchanged (31% each)                                                                    |
| <b>Government</b>                       | +16% fewer people in the office, 1-15% fewer people in the office (40% each)                                             |
| <b>Manufacturing</b>                    | +16% fewer people in the office (55%)                                                                                    |
| <b>Municipality</b>                     | Unchanged (47%)                                                                                                          |
| <b>Professional Services</b>            | +16% fewer people in the office, 1-15% fewer people in the office, Unchanged, 1-15% more people in the office (25% each) |
| <b>Real Estate &amp; Infrastructure</b> | +16% fewer people in the office, 1-15% fewer people in the office (40% each)                                             |
- For all sectors, the most 'popular' estimation is typically that there are fewer people in the office. There is some variation in terms of how drastic this change has been (i.e. 1-15% fewer or +16% fewer).

# Days in the Office

## What days are most people in the office?



Generally, presence in the office has decreased since the pandemic, as employees have greater flexibility in choosing when they come to the office.

However, a clear pattern seems to emerge in Scandinavia: 73-76% of respondents state that Tuesday-Thursday are the most popular days.

Conversely, 44% indicate that Monday is popular and only 24% say the same for Friday. In essence, it appears that the days leading up to and after the weekend are less popular.

## By Country

### What are the 3 most popular days?

(% of respondents indicating day of the week)

#### Denmark

1. Thursday (72%)
2. Tuesday (64%)
3. Wednesday (60%)

#### Norway

1. Tuesday (86%)
2. Thursday (82%)
3. Monday, Wednesday (77% each)

#### Sweden

1. Wednesday (84%)
2. Tuesday, Thursday (74% each)
3. Monday (26%)

- In all countries, Tuesday, Wednesday and Thursday are the three most popular days.
- Only in Norway does Monday appear to be a particularly popular day, with 77% of respondents saying it is one of the most popular days where employees are in the office.

## By Sector

### What is the most popular day?

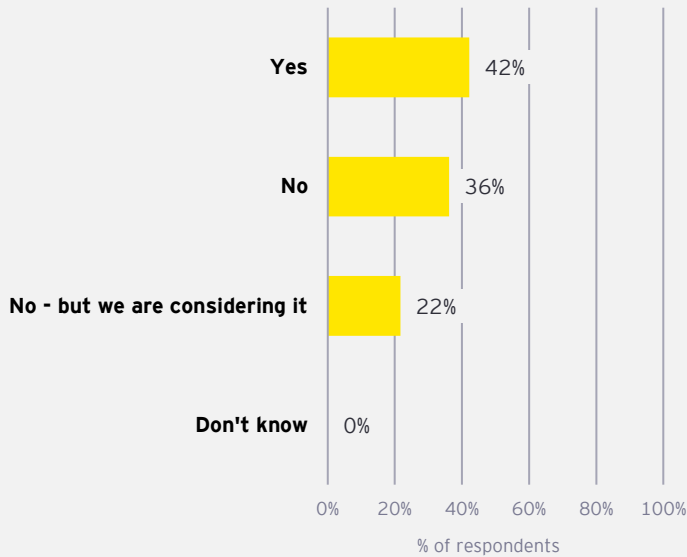
(Day with highest % of respondents)

<b>Consumer Retail</b>	Tuesday, Wednesday, Thursday (100% each)
<b>Education</b>	Tuesday, Wednesday, Thursday (100% each)
<b>Energy</b>	Tuesday, Wednesday, Thursday (100% each)
<b>Financial Services &amp; IT</b>	Tuesday, Thursday (86% each)
<b>FM Supplier</b>	Monday, Tuesday (75% each)
<b>Government</b>	Tuesday, Thursday (75% each)
<b>Manufacturing</b>	Wednesday (88%)
<b>Municipality</b>	Tuesday, Thursday (82% each)
<b>Professional Services</b>	Monday (100%)
<b>Real Estate &amp; Infrastructure</b>	Thursday (63%)

- For most sectors, Tuesday appears to be the most popular day - alternatively Thursday or Wednesday.
- Monday, however, appears to be most popular for FM Suppliers and Professional Services.

# Measuring Office Occupancy

## Do you measure occupancy of buildings and desks?



Office occupancy has changed post-pandemic and predicting how many employees are in the office on a daily basis can be difficult.

42% of respondents state that they measure building and desk occupancy, typically with the aid of technology. An additional 22% are considering doing it.

However, one-in-three of respondents do not currently measure office occupancy and do not plan to measure occupancy.

There are clear differences by country, where it is noticeably more common in Sweden to measure occupancy. By sector, the title is particularly the Energy and Financial Services & IT sectors that measure occupancy.

## By Country

### Do you measure office occupancy? (% of respondents indicating given response)

#### Denmark

1. Yes (38%)
2. No - but we are considering it (34%)
3. No (28%)

#### Norway

1. No (55%)
2. Yes (28%)
3. No - but we are considering it (17%)

#### Sweden

1. Yes (68%)
2. No (23%)
3. No - but we are considering it (9%)

- In Denmark, 38% say they measure office occupancy, while another 34% say they are considering it.
- In Norway, 55% say they do not measure office occupancy - the highest 'no' share amongst the three Scandinavian countries.
- Sweden has the highest share of respondents who do measure office occupancy (68%) amongst the Scandinavian countries.

## By Sector

### Do you measure office occupancy? (Answer with highest % of respondents)

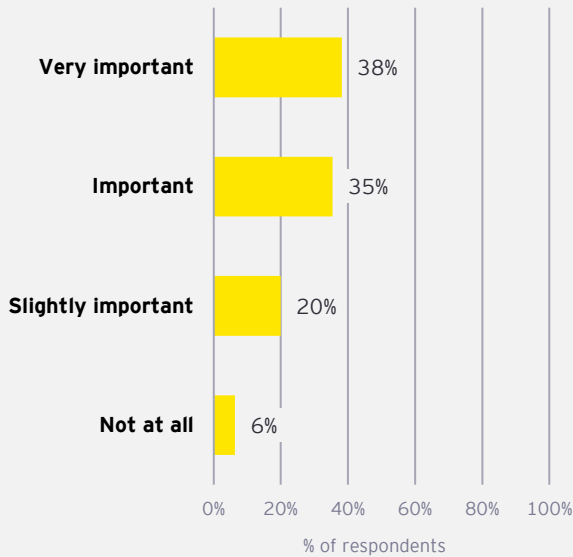
<b>Consumer Retail</b>	No (50%)
<b>Education</b>	No - but we are considering it (50%)
<b>Energy</b>	Yes (75%)
<b>Financial Services &amp; IT</b>	Yes (86%)
<b>FM Supplier</b>	Yes (50%)
<b>Government</b>	Yes, No - but we are considering it, No (33% each)
<b>Manufacturing</b>	Yes (60%)
<b>Municipality</b>	No (48%)
<b>Professional Services</b>	No (50%)
<b>Real Estate &amp; Infrastructure</b>	No (50%)

- The Energy, Financial Services & IT, FM Supplier, and Manufacturing sectors have a majority of respondents that do measure occupancy (+60%).
- For all other sectors, 50% of respondents indicate that they do not measure office occupancy.



# Flexibility & Talent Attraction

To what extent do you believe the opportunity to work from home is important for recruiting and retaining employees?



Previous studies by EY show that employees highly value flexibility in terms of where and when they work. For many employees, it is increasingly a parameter they require from employers, and it may influence career decisions.

73% of the respondents agree - flexibility to work from home is important or very important for recruiting and retaining employees in an organization.

## By Country

How important is talent attraction? (Top 3)  
(% of respondents indicating given response)

- Denmark**
1. Very important (56%)
  2. Important (36%)
  3. Slightly important (8%)

- Norway**
1. Slightly important (40%)
  2. Important (33%)
  3. Not at all (16%)

- Sweden**
1. Very important (58%)
  2. Important (38%)
  3. Slightly important (4%)

- In Denmark and Sweden, 56-58% agree that flexibility to work from home is very important. Another 36-38% agree it is important.
- In Norway, the view is slightly different, with 40% indicating that it is slightly important, and only 33% indicating it is important.

## By Sector

How important is talent attraction?  
(Response with highest % of respondents)

<b>Consumer Retail</b>	Important (75%)
<b>Education</b>	Very important (60%)
<b>Energy</b>	Very important (100%)
<b>Financial Services &amp; IT</b>	Very important (57%)
<b>FM Supplier</b>	Very important (36%)
<b>Government</b>	Important (60%)
<b>Manufacturing</b>	Important, Very important (45% each)
<b>Municipality</b>	Important (39%)
<b>Professional Services</b>	Very important (75%)
<b>Real Estate &amp; Infrastructure</b>	Very important (63%)

- In majority of sectors, flexibility is either important or very important for a significant majority (+60%).
- However, in certain sectors - e.g. FM Supplier, Manufacturing, and Municipality) - responses are more varied, with the most popular response only receiving 36-45% of total responses.

# Workplace of the Future





# Workplace of the Future

## Summary of Findings

### The Scandinavian Workplace

Views on the future of the workplace vary, but it is clear we are not returning to the office - at least not to the same extent as pre-pandemic. Rather, a small majority (44%) of survey respondents state the office is an Anchor where we work most days. For between 21-24% of respondents, the office is either a Connector (meet and collaborate), or a Magnet (where we learn, develop, and feel the culture).

Across Scandinavia, fixed seating is still the preferred workplace concept to organize office spaces. A total of 48% say they use fixed seating. An additional 19% say they use a combination of fixed and free seating.

For most respondents (65%), the area efficiency of the Scandinavian office lies in the range between 10 and 19 sqm (gross) per employee (36% and 29%, respectively). There is notable variation by countries and sectors, however, which are elaborated on in this section.

### The Future Workplace Design

71% of respondents say they will change the physical design of the workplace in the next 0-2 years. In particular, 94% of respondents from Sweden indicate they will make a change - compared to only 46% in Norway.

The new workplace design will cater to Online Meetings, Collaboration, Socializing and Focus/Concentration.

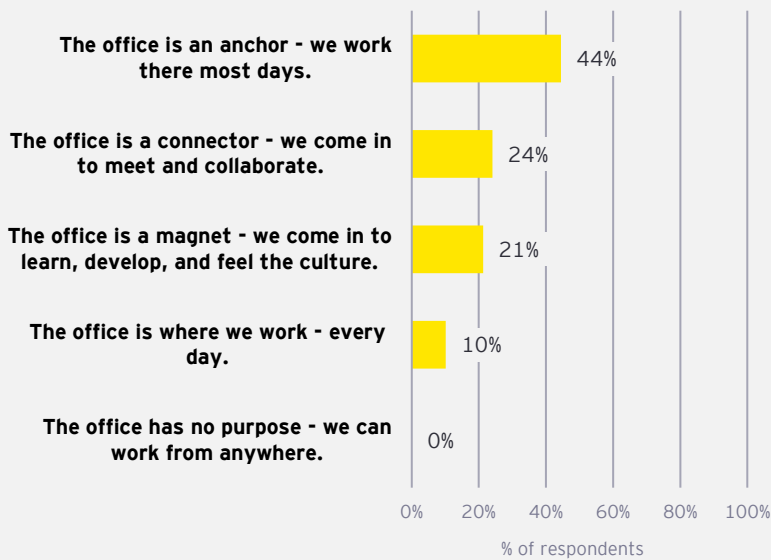
Respondents indicate that the new workplace design will also be much more space efficient: 77% respond that they will decrease space ratio, i.e. the number of square meters/employee - 53% indicate they will do so by at least 11%.

To achieve this, 88% respond that they will decrease the desk ratio, i.e., the number of desks/employee. 56% will decrease the number of desks by over 10%.

However, 71% respond that they will increase the meeting room ratio, i.e. the number of meeting rooms - to better accommodate the growth in online meetings.

# The Office of the Future

Which of the following statements best aligns with your expectations for the purpose of the office in the future?



Views on the future of the office vary, but one thing is abundantly clear: post-pandemic we have not returned to working from the office every day.

Similarly, however, the office still retains a purpose, no REFAM organization believes we can work from anywhere.

Rather, for a small majority (44%) of survey respondents, the office is an Anchor where we work most days. For between 21-24% of respondents, the office is either a Connector (meet and collaborate), or a Magnet (learn, develop, and feel the culture).

Only 10% respond that the office is where we work every day; and 0% of REFAM organizations believe the office no longer has a purpose.

## By Country

How do countries view the purpose of the office?  
(% of respondents indicating statement)

- Denmark - The Office is...**
1. An anchor - we work there most days (62%)
  2. A connector - we meet and collaborate (26%)
  3. A magnet - where we learn, develop, and feel the culture (20%)

- Norway - The Office is...**
1. An anchor - we work there most days (36%)
  2. A connector - we meet and collaborate (30%)
  3. Where we work - every day (23%)

- Sweden - The Office is...**
1. A connector - where we meet and collaborate (44%)
  2. An anchor - we work there most days (32%)
  3. A magnet - where we learn, develop, and feel the culture (13%)

- In Denmark, the majority (62%) say the office is an Anchor - where we work most days.
- In Norway, perspectives differ. 36% believe the office is an Anchor (where we work most days), but 23% say it is where we work every day.
- In Sweden, 44% believe the office is a Connector, bringing employees together to meet and collaborate, while 32% say it is where we work most days (Anchor).

## By Sector

What is the main purpose of the office?  
(Statement with highest % of respondents)

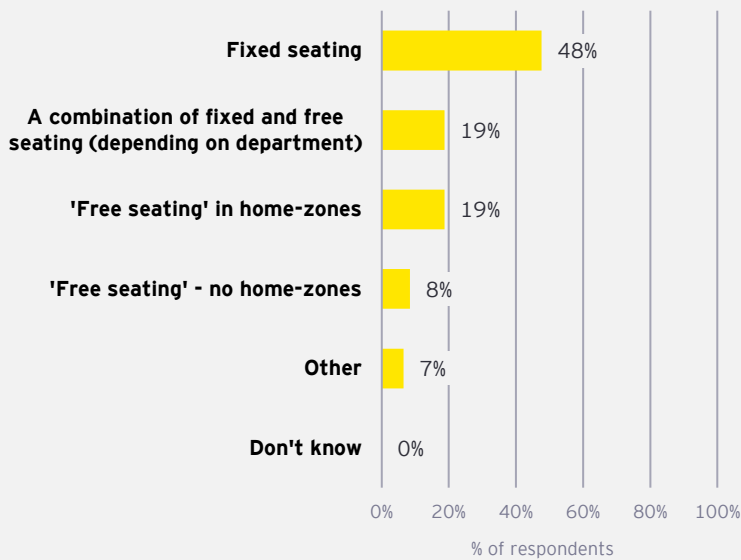
<b>Consumer Retail</b>	Anchor - we work there most days (100%)
<b>Education</b>	Anchor - we work there most days (80%)
<b>Energy</b>	Connector - we meet and collaborate (50%)
<b>Financial Services &amp; IT</b>	Magnet - where we learn, develop, and feel the culture (43%)
<b>FM Supplier</b>	Anchor - we work there most days (41%)
<b>Government</b>	Anchor - we work there most days (83%)
<b>Manufacturing</b>	Connector - we meet and collaborate (50%)
<b>Municipality</b>	Anchor or Magnet (33% each)
<b>Professional Services</b>	Anchor or Connector (50% each)
<b>Real Estate &amp; Infrastructure</b>	Anchor - we work there most days (57%)

- Most sectors see the office as an Anchor - especially Consumer Retail, Education, Government where over 80% of respondents say so.
- In the Energy and Manufacturing sectors, the office is more often viewed as a Connector (50%) compared to other perspectives.



# Workplace Concept

## Which workplace concept does your organization currently apply for office spaces?



Across Scandinavia, fixed seating is still the preferred workplace concept to organize office spaces, with nearly two-thirds responding they used fixed seating. A total of 48% say they primarily use fixed seating (across the organization). An additional 19% say they use a combination of fixed and free seating.

Only 27% indicate they primarily use free seating - and only 8% do so without home zones entirely.

However, there is a noticeable difference at country level, as outlined below.

### By Country

#### How do countries organize their workplace? (Office concepts by % of respondents)

- Denmark**
  1. Fixed seating (54%)
  2. Free seating in home zones (23%)
  3. A combination of fixed and free seating (13%)
- Norway**
  1. Fixed seating (63%)
  2. A combination of fixed and free seating (19%)
  3. Free seating in home zones (12%)
- Sweden**
  1. Free seating - no home zones, A combination of fixed and free seating (28% each)
  3. Free seating in home zones (24%)

- In Denmark and Norway, the majority (54% and 63%) have fixed seating. The remaining ~30% have a combination of fixed and free seating, or free seating in home zones.
- In Sweden, 28% say they have abolished homezones, and simply have free seating - this compared to 2-3% in Norway and Denmark. In fact, only 12% in Sweden say they have fixed seating.

### By Sector

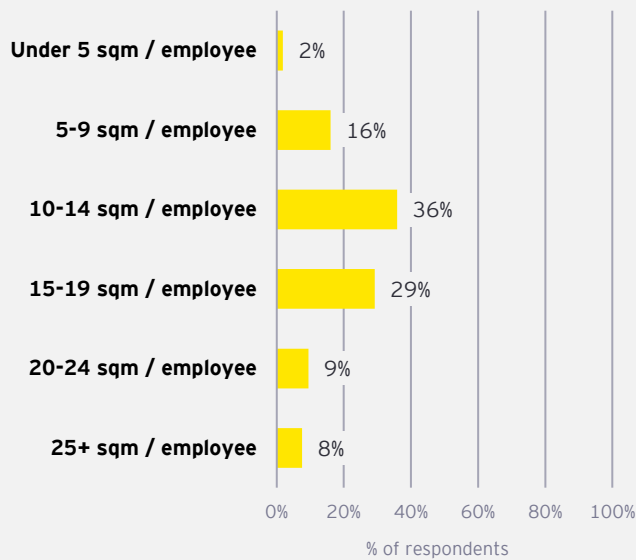
#### What is the main workplace concept? (Concept with highest % of respondents)

<b>Consumer Retail</b>	Fixed seating, Free seating in home-zones (50% each)
<b>Education</b>	Fixed seating (60%)
<b>Energy</b>	Other (Transitioning to free) (50%)
<b>Financial Services &amp; IT</b>	Fixed seating, A combination of fixed and free seating (29% each)
<b>FM Supplier</b>	Fixed seating (38%)
<b>Government</b>	Fixed seating, A combination of fixed and free seating (33% each)
<b>Manufacturing</b>	Free seating in home-zones (50%)
<b>Municipality</b>	Fixed seating (64%)
<b>Professional Services</b>	Fixed seating (50%)
<b>Real Estate &amp; Infrastructure</b>	Fixed seating (71%)

- The vast majority of industries have fixed seating (+50%), or a combination of fixed and free seating.
- A few industries, e.g. Consumer Retail and Manufacturing, have to a larger extent adopted free seating in home-zones (+50%).
- Also note that the transition to free seating without home zones is not industry-specific.

# Space Management

## What is your average area efficiency for office space today? (Gross)



For many sectors, the office and the buildings occupied are the greatest contributor to carbon emissions. Optimizing office space and area utilization can help reduce costs and environmental impact.

For the majority of Scandinavian workplaces (65%), the area efficiency/utilization lies in the range between 10 and 19 sqm (gross) per employee (36% and 29%, respectively).

A small but significant share (18% and 17%, respectively) have either a very high area utilization (under 9 sqm/employee) or low area utilization (above 20 sqm/employee).

There are some noticeable differences across countries and sectors, as described below.

### By Country

#### How do countries differ in area efficiency? (Area utilization range by % of respondents)

- Denmark**
1. 15-19 sqm/employee (42%)
  2. 10-14 sqm/employee (18%)
  3. 5-9 sqm/employee (15%)

- Norway**
1. 10-14 sqm/employee (44%)
  2. 5-9 sqm/employee (23%)
  3. 15-19 sqm/employee (19%)

- Sweden**
1. 10-14 sqm/employee (44%)
  2. 15-19 sqm/employee (32%)
  3. 25+ sqm/employee (12%)

- In Norway and Sweden, 44% indicate an average area utilization of between 10-14 sqm/employee for office areas, which is rather efficient. Denmark appears to have a slightly less efficient area utilization, as 42% indicate a utilization of 15-19 sqm/employee on average.
- In Norway specifically, there appears to be a higher area efficiency compared to Denmark and Sweden. One in four indicate an area utilization of 5-9 sqm/employee or lower (compared to 18% and 4% in Denmark and Sweden, respectively)

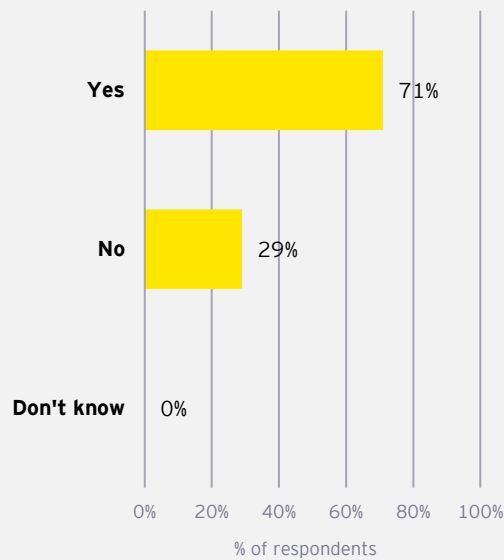
### By Sector

#### What is the typical area utilization? (Area utilization range with highest % of respondents)

- |                                         |                                           |
|-----------------------------------------|-------------------------------------------|
| <b>Consumer Retail</b>                  | 5-9 sqm/employee (67%)                    |
| <b>Education</b>                        | 15-19 sqm/employee (50%)                  |
| <b>Energy</b>                           | 20-24 and 15-19 sqm/employee (50% each)   |
| <b>Financial Services &amp; IT</b>      | 15-19 and 10-14 sqm/e (50% each)          |
| <b>FM Supplier</b>                      | 10-14 sqm/employee (41%)                  |
| <b>Government</b>                       | 20-24 sqm/employee (40%)                  |
| <b>Manufacturing</b>                    | 10-14 sqm/employee (50%)                  |
| <b>Municipality</b>                     | 10-14 sqm/employee (43%)                  |
| <b>Professional Services</b>            | 15-19 sqm/employee (50%)                  |
| <b>Real Estate &amp; Infrastructure</b> | 25+, 20-24, 15-19 sqm/employee (29% each) |
- The Energy and Government sectors appear to have relatively more space, with between 40-50% indicating an average utilization of 20-24 sqm/employee.
  - Conversely, 67% of Consumer Retail respondents indicate that they have 5-9 sqm/employee on average.
  - The other sectors lie in the average range of between 10-19 sqm/employee.

# Workplace Design

## Will you change the physical design of the workplace within the next 0-2 years?



The way we work is changing, and results indicate that many employees work from home and office presence lies below 75%. As a result, the purpose of the office has to change, and for many that also entails re-designing the physical workplace.

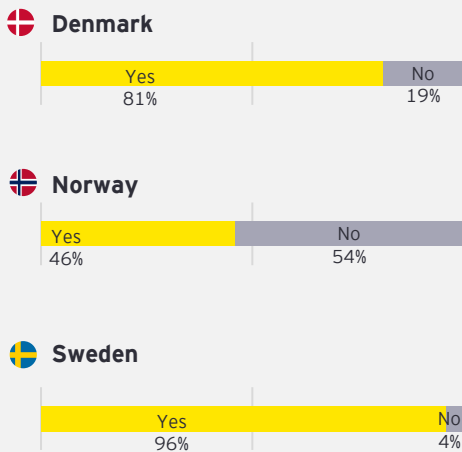
A significant majority (71%) say they will change the physical design of the workplace in the next 0-2 years.

The remainder (21%) say they do not intend to make any change to the physical design of the workplace.

There are distinct differences by country and sector, with Denmark and Sweden particularly ambitious changing the physical workplace.

### By Country

#### Which countries will change the physical design? (Answer by % of respondents)



- In Sweden, there is an overwhelming majority of respondents who say they will change the physical design (96%).
- There is a similarly high majority in Denmark (81%), though nearly one in five respondents say they will not change the physical design.
- In Norway, more than half of respondents (54%) indicate that they will not, or do not expect to, change the physical design of the workplace.

### By Sector

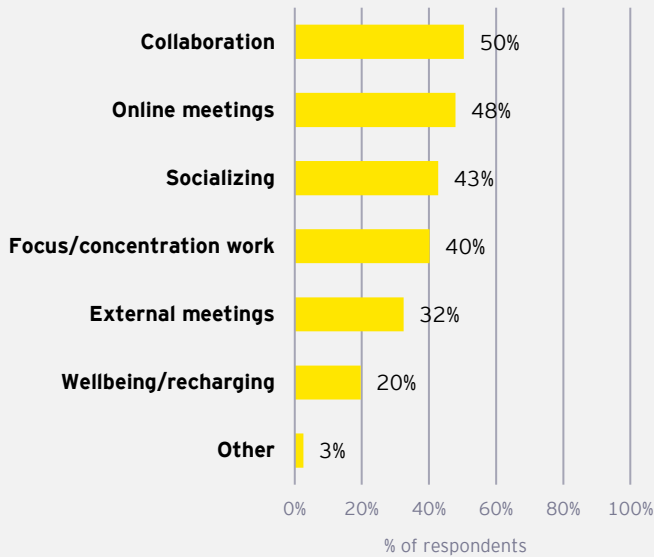
#### What sectors will change the physical design? (Answer with highest % of respondents)

<b>Consumer Retail</b>	Yes (67%)
<b>Education</b>	Yes, No (50% each)
<b>Energy</b>	Yes (100%)
<b>Financial Services &amp; IT</b>	Yes (100%)
<b>FM Supplier</b>	Yes (87%)
<b>Government</b>	Yes (80%)
<b>Manufacturing</b>	Yes (78%)
<b>Municipality</b>	No (53%)
<b>Professional Services</b>	Yes (100%)
<b>Real Estate &amp; Infrastructure</b>	Yes, No (50% each)

- It is predominantly the Education, Municipality, and Real Estate & Infrastructure sectors, where a significant share of respondents (~50%) indicate that they do not expect to change the physical design of the workplace.
- In the other sectors, there is an overwhelming majority (67% or higher) who indicate that they will change the physical design of the workplace.

# Office Activities

If you will change the physical design of the workplace - what activities will you cater to in your office spaces?



The physical workplace needs to change, to adapt to new and more hybrid ways of working, exemplified through new workplace behaviors and activities.

50% of respondents say they will cater to Collaboration, and a similar share (48%) will also change the physical design of the workplace to cater to online meetings.

Approximately two in five respondents (40-43%) will also increasingly cater to socializing, as well as focus/concentration work.

32% will re-design the office to cater to external meetings. Only 20% will support employee wellbeing/recharging.

## By Country

What activities are most catered to?  
(% of respondents by activity)

- Denmark**
  1. Online meetings (58%)
  2. Collaboration (55%)
  3. Socializing (53%)
- Norway**
  1. Collaboration (35%)
  2. Online meetings (30%)
  3. Socializing (20%)
- Sweden**
  1. Collaboration (78%)
  2. Socializing (74%)
  3. Online meetings (70%)

- In all Scandinavian countries, Collaboration and Online Meetings are the top two activities.
- In Sweden, there is a significant consensus of what should change: more than 70% of respondents say they will focus on the top 3 activities. In Denmark, between 53-58% say the same. In Norway, views on what should change are more diverse - the most popular activity, Collaboration, is only selected by 35% of respondents.

## By Sector

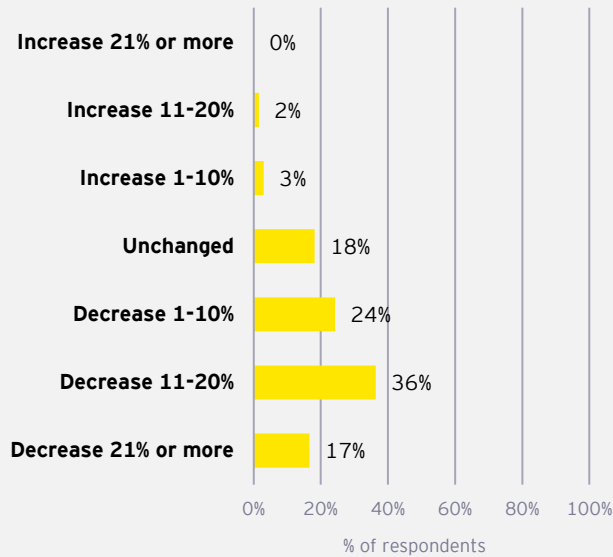
What is the most common activity to cater to?  
(Activity with highest % of respondents)

<b>Consumer Retail</b>	Online meetings (50%)
<b>Education</b>	Focus/concentration work, Collaboration, External Meetings, Online Meetings, Socializing (40% each)
<b>Energy</b>	Focus/concentration work, Collaboration, External Meetings, Online Meetings, Socializing (100% each)
<b>Financial Services &amp; IT</b>	Collaboration, Online Meetings, Socializing (100% each)
<b>FM Supplier</b>	Collaboration (61%)
<b>Government</b>	Focus/Concentration work (67%)
<b>Manufacturing</b>	Socializing (64%)
<b>Municipality</b>	Collaboration (41%)
<b>Professional Services</b>	Collaboration, Online Meetings, Socializing (80% each)
<b>Real Estate &amp; Infrastructure</b>	Focus/concentration work, Collaboration, Online Meetings (25% each)

- Strong consensus to re-design the workplace is seen in several sectors, where certain activities receive between 61%-100% of sector responses (e.g. Energy, Financial Services & IT, FM Suppliers, Government, Manufacturing, Professional Services).

## Space Management (2)

If you will change the physical design of the workplace - how will your sqm / employee (space ratio) change?



The office space will change, but not only that: many REFM organizations indicate that they will also require less space in the future.

Of those respondents who say they will change the physical design of the workplace in the coming years, 77% respond that they will decrease space ratio, i.e. the number of square meters/employee.

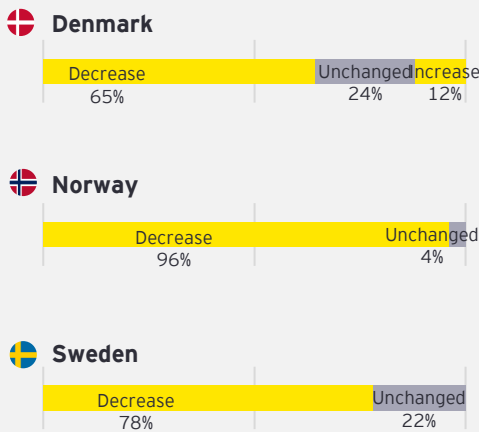
53% indicate they will do so by at least 11%.

Only 5% of respondents indicate that they will increase the amount of space per employee (i.e. sqm/employee).

18% will leave their space efficiency unchanged.

### By Country

Which countries are most ambitious to change?  
(% of respondents by expected change to space ratio)



- In Norway, nearly all respondents (96%) that will change the physical workplace say they will reduce available area (decreasing sqm/employee).
- In Sweden, 78% indicate they will decrease sqm/employee. But 22% will leave area unchanged.
- In Denmark, fewer respondents than the rest of the Scandinavian countries will decrease space ratio (only 65%), and 12% say they will in fact increase available area (increasing sqm/employee)

### By Sector

What is the most common change in area?  
(Answer with highest % of respondents)

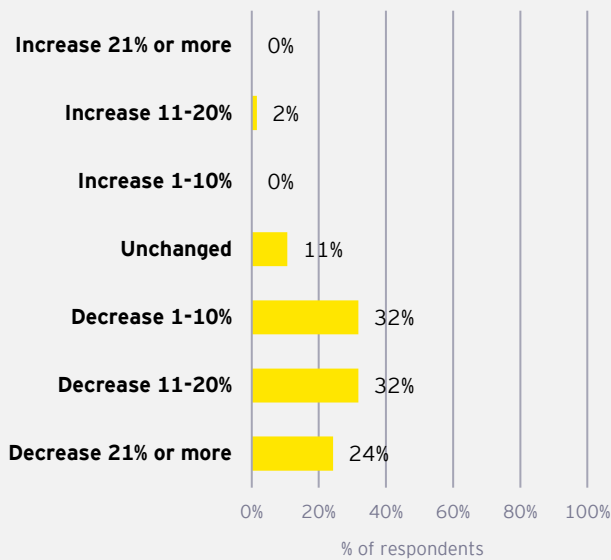
<b>Consumer Retail</b>	Decrease 1-10%, Unchanged (50% each)
<b>Education</b>	Decrease 11-20%, Unchanged (50% each)
<b>Energy</b>	Decrease 21% or more (100%)
<b>Financial Services &amp; IT</b>	Decrease 1-10% (43%)
<b>FM Supplier</b>	Decrease 1-10% (40%)
<b>Government</b>	Decrease 1-10% (50%)
<b>Manufacturing</b>	Decrease 11-20% (57%)
<b>Municipality</b>	Decrease 11-20% (36%)
<b>Professional Services</b>	Decrease 21% or more, Decrease 11-20%, Unchanged, Increase 1-10% (25% each)
<b>Real Estate &amp; Infrastructure</b>	Decrease 21% or more, Decrease 11-20% (50% each)

- The Energy and Real Estate & Infrastructure sectors are the most ambitious in terms of area reduction; nonetheless, they indicated the highest current area utilization (approx. 20 sqm/employee).
- Typically, approx. 50% of respondents per sector indicate they will reduce sqm/employee by between 1-20%.
- Only in Consumer Retail and Education are there significant share of respondents (50%) who will not change the space ratio.



# Desks

If you will change the physical design of the workplace - how will the number of desks / employee (desk ratio) change?



Less space also means more efficient space, and in particular REFM organizations will reduce the number of desks made available to employees.

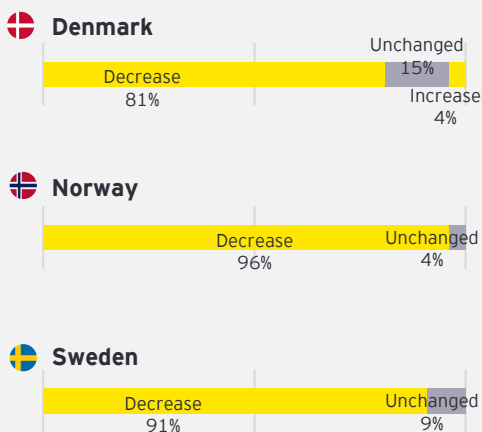
Of those respondents who say they will change the physical design of the workplace in the coming years, 88% respond that they will decrease the desk ratio, i.e. the number of desks per employee.

Over half (56%) indicate they will do so by at least 11%. In fact, 24% say they will remove one in every five desks, a reduction of at least 20%.

Only 11% indicate that they will maintain the current number of desks.

## By Country

Which countries are most ambitious?  
(% of respondents by expected change to desk ratio)



- In all Scandinavian countries, the vast majority (81-96%) say they will decrease the number of desks.
- In Denmark and Sweden, 26% say they will decrease the number of desks by more than 20% - In Norway, 18% say the same.
- Only between 4-15% will not change the number of desks.
- And only in Denmark, a minority (4%) will actually increase the number of desks.

## By Sector

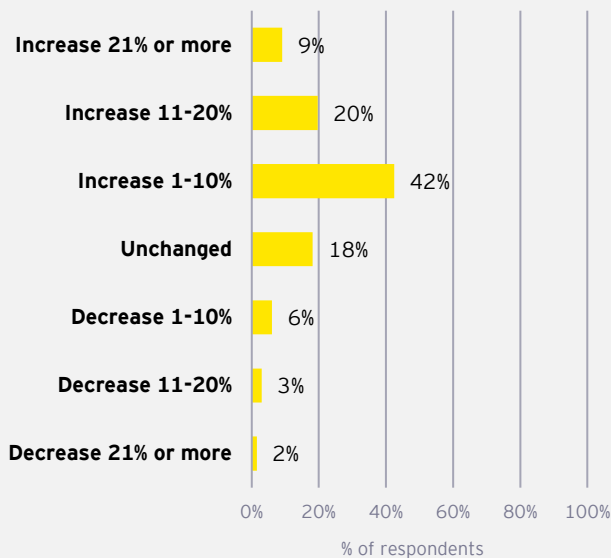
What is the most common change in desk ratio?  
(Answer with highest % of respondents)

<b>Consumer Retail</b>	Decrease 1-10%, Unchanged (50% each)
<b>Education</b>	Decrease 11-20%, Decrease 1-10% (50% each)
<b>Energy</b>	Decrease 21% or more (75%)
<b>Financial Services &amp; IT</b>	Decrease 1-10% (57%)
<b>FM Supplier</b>	Decrease 11-20% (45%)
<b>Government</b>	Decrease 1-10% (50%)
<b>Manufacturing</b>	Decrease 21% or more, Decrease 11-20%, Decrease 1-10% (29% each)
<b>Municipality</b>	Decrease 21% or more, Decrease 11-20%, (36% each)
<b>Professional Services</b>	Decrease +21%, 11-20%, 1-10%, Unchanged (25% each)
<b>Real Estate &amp; Infrastructure</b>	Decrease 11-20% (100%)

- The Energy, Manufacturing, and Municipality sectors all have a noticeable ambition to reduce desks by 21% or more.
- In most other sectors, the most common response is to decrease typically between 1-10% or 11-20%

# Meeting Rooms

If you will change the physical design of the workplace - how will the number of meeting rooms / employee (meeting room ratio) change?



Although there might be less space required in the workplace of the future, there is still a clear requirement for different and certain kinds of spaces. In particular, REFM organizations indicate that the office will require a few more meeting rooms.

Of the respondents who say they will change the physical design of the workplace in the coming years, 71% respond that they will increase the meeting room ratio, i.e. number of meeting rooms.

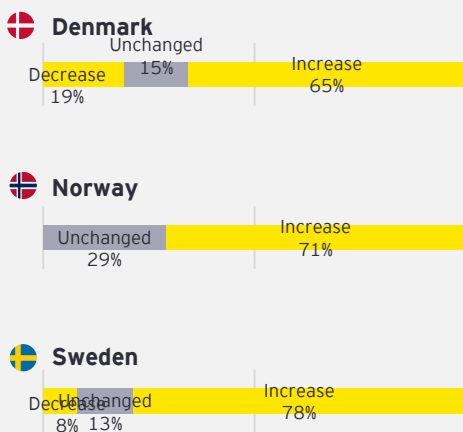
42% indicate they will do so by 1-10%. A further 29% will increase meeting room numbers by 11% or higher.

Only 11% of respondents say they will decrease the number of meeting rooms.

## By Country

Which countries are most ambitious?

(% of respondents by expected change to meeting room ratio)



- In all Scandinavian countries, the vast majority (65-78%) say they will increase the number of meeting rooms. Between 24-30% say they will do so by at least 11%.
- In Norway, 29% will not change the meeting room ratio - compared to only 13-15% in Denmark and Sweden.
- In Denmark and Sweden, a minority (8-19%) indicate that they will conversely decrease the number of meeting rooms (mostly between 1-10%). No respondents in Norway indicate that they will do that.

## By Sector

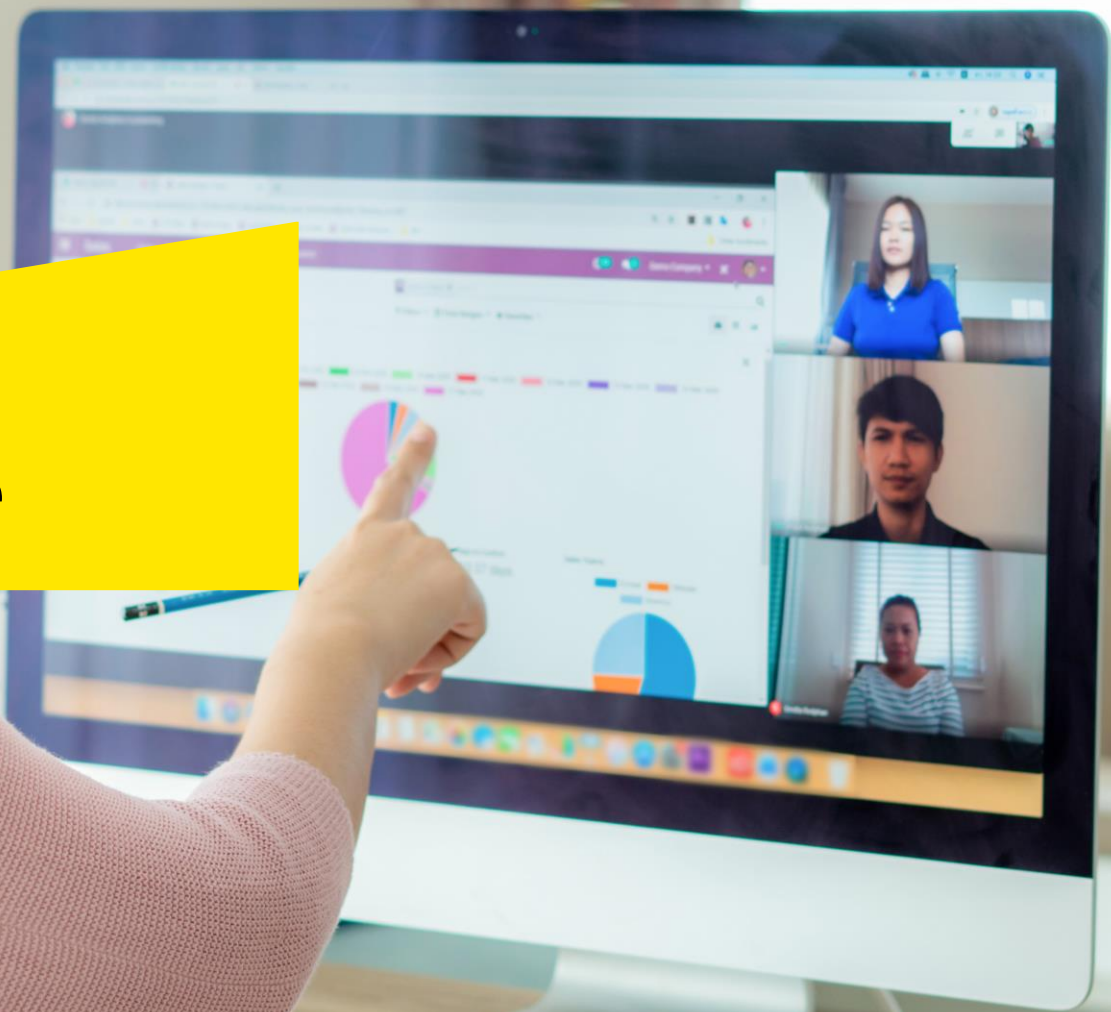
What is the most common change in room ratio?

(Answer with highest % of respondents)

<b>Consumer Retail</b>	Decrease 1-10%, Unchanged (50% each)
<b>Education</b>	Increase 1-10% (100%)
<b>Energy</b>	Unchanged, Increase 1-10%, 11-20%, +21% (25% each)
<b>Financial Services &amp; IT</b>	Increase 1-10% (57%)
<b>FM Supplier</b>	Unchanged, Increase 11-20% (30% each)
<b>Government</b>	Increase 1-10% (50%)
<b>Manufacturing</b>	Increase 1-10% (57%)
<b>Municipality</b>	Increase 1-10% (57%)
<b>Professional Services</b>	Increase 11-20%, 1-10% (50% each)
<b>Real Estate &amp; Infrastructure</b>	Increase 1-10% (100%)

- Most sectors will increase meeting room ratio by between 1-10%.
- Respondents from the Consumer Retail sector indicate they will either decrease the ratio between 1-10% or keep it unchanged.

# Home Office



# Home Office

## Summary of Findings

### Equipment & Services

With many employees able to work from home a few days per week, 42% of respondents offer IT equipment for employees to use at home - and an additional 26% also provide furniture. The tendency to provide IT equipment is more common in Denmark than in Sweden or Norway.

A very small share of employers (<6%) offer other services related to health & wellbeing, catering, cleaning, and utilities.

### Employee Satisfaction with Services Provided

Across Scandinavia, REFM organizations surveyed judge that employees are fairly satisfied with the equipment and services currently provided: 61% respond 'to some extent', and another 27% respond 'to a large extent'. There is little variance across the three countries.

However, there is clearly an opportunity to improve employee satisfaction, increasing the share who respond, 'to a large extent'.

### Financing

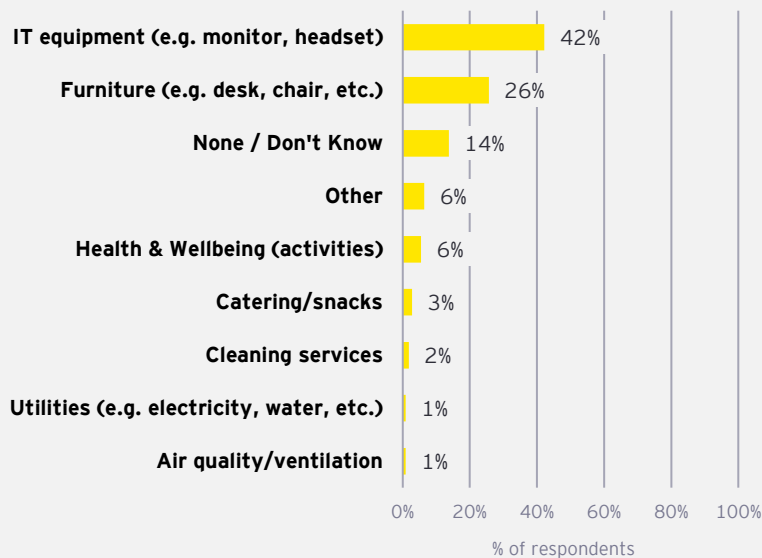
For the respondents that do provide services and equipment for employees (60%), it is typically the organization that pays for it - for example as a cash subsidy, or on loan (of equipment) by the employee during the duration of their employment. For 39% of respondents, the organization only finances the employees' PC/laptops.

In a separate question, 97% of organizations surveyed respond that they do not expect to provide employees with any additional financial compensation for using their home as an office (for example to cover increased utility bills or other indirect costs).



# Equipment and Services

## What equipment and services do you provide for employees' home office?



With organizations offering employees the opportunity to work from home a few days a week, discussions arise about the responsibility of the employer towards employees' home office. It is a subject of discussion between labor market representatives in the Scandinavian countries. Some organizations also increasingly use home office services as part of their recruitment and talent attraction strategy.

In this survey, we find that most organizations provide little to no equipment for employees' home office. As it stands, 42% of respondents offer IT equipment for employees to use at home - and additional 26% also provide furniture.

A very small share of employers (<6%) offer other services related to health & wellbeing, catering, cleaning, and utilities.

### By Country

#### What are 3 most common services provided? (% of respondents indicating given service)

- Denmark**
  - IT equipment (65%)
  - Furniture (43%)
  - Health & Wellbeing (15%)
- Norway**
  - None / Don't Know (22%)
  - IT equipment (17%)
  - Furniture, Other (4% each)
- Sweden**
  - IT equipment (44%)
  - Furniture (33%)
  - Other (11%)

- In Denmark, a majority of organizations provide IT equipment (typically a monitor) and, to a lesser extent, furniture (e.g. ergonomic office chair - 43%). A small subset also offer Health & Wellbeing services, e.g. access to a physiotherapist.
- In Norway, it is much less common to offer equipment to employees, with only 17% offering IT equipment.
- In Sweden, some organizations provide IT equipment (44%) and furniture (33%).

### By Sector

#### What is the main service provided? (Criterion with highest % of respondents)

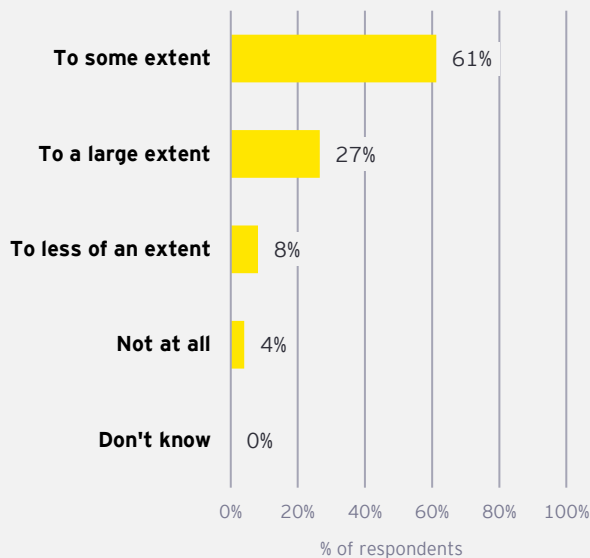
<b>Consumer Retail</b>	IT equipment (50%)
<b>Education</b>	IT equipment (60%)
<b>Energy</b>	Furniture, IT equipment (75% each)
<b>Financial Services &amp; IT</b>	IT equipment (71%)
<b>FM Supplier</b>	Other, None / Don't Know (11% each)
<b>Government</b>	Furniture, IT equipment (100% each)
<b>Manufacturing</b>	IT equipment (82%)
<b>Municipality</b>	IT equipment (38%)
<b>Professional Services</b>	Furniture, IT equipment (40% each)
<b>Real Estate &amp; Infrastructure</b>	IT equipment (63%)

- Most sectors offer employees IT equipment. However, in some sectors it is more prevalent (e.g. Energy, Financial Services & IT, Government, Manufacturing) with over 60% saying they provide equipment to employees.
- Only amongst FM Suppliers is there a lower tendency to offer equipment, in part because many employees are on-site.



# Employee Satisfaction

## Are employees satisfied with the equipment and services for home office that are currently offered/provided?



A key element of the great workplace experience is ensuring user/employee satisfaction. However, it can be difficult to determine how satisfied employees are with what employers offer for the home office. In part because there are no clear requirements for what employees should offer.

Nonetheless, the REFM organizations surveyed respond that that employees are fairly satisfied with the equipment and services currently provided.

When asked, 61% respond 'to some extent', and another 27% respond 'to a large extent'. This indicates that there is room for improvement.

### By Country

#### How satisfied are employees? (% of respondents by answer)

- Denmark**
- To some extent (62%)
  - To a large extent (31%)
  - Not at all, To less of an extent (4% each)

- Norway**
- To some extent (67%)
  - To a large extent (22%)
  - To less of an extent (11%)

- Sweden**
- To some extent (57%)
  - To a large extent (21%)
  - To less of an extent (14%)

- In Denmark and Norway, around 90% of respondents combined respond that employees to 'some' or 'large' extent are satisfied with services provided. In Sweden, 78% of respondents state the same, suggesting slightly lower satisfaction.

### By Sector

#### What is the average satisfaction level? (Answer with highest % of respondents)

<b>Consumer Retail</b>	To some extent (67%)
<b>Education</b>	To some extent (67%)
<b>Energy</b>	To some extent, To a large extent (50% each)
<b>Financial Services &amp; IT</b>	To some extent (67%)
<b>FM Supplier</b>	To a large extent (100%)
<b>Government</b>	To a large extent (67%)
<b>Manufacturing</b>	To some extent (67%)
<b>Municipality</b>	To some extent (69%)
<b>Professional Services</b>	To a large extent (67%)
<b>Real Estate &amp; Infrastructure</b>	To some extent (83%)

- In a majority of sectors, surveyed organizations indicate that employees 'to some extent' are satisfied.
- In the Energy, FM Supplier, Government, and Professional Services sector, however, a majority indicate that employees to a 'large extent' are satisfied.

# Financing of Equipment

## How do you finance home office equipment and services?



For the respondents that do provide services and equipment for employees, it is typically the organization that pays for everything (45%) – sometimes offering the equipment on loan by the employee during the duration of their employment.

For 39% of respondents, the organization only finances the employees' PC/laptops. Only 6% provide a financial subsidy to purchase equipment.

In a separate question, 97% of organizations surveyed respond that they do not expect to provide employees with any additional financial compensation for using their home as an office (for example to cover increased utility bills or other indirect costs).

### By Country

#### What are the top 3 financing methods?

(% of respondents indicating given method)

- Denmark**
    - The organization pays for everything (60%)
    - The organization does not pay for anything besides PC (27%)
    - A combination (10%)
  - Norway**
    - The organization does not pay for anything besides PC (56%)
    - The organization pays for everything (38%)
    - A combination (6%)
  - Sweden**
    - The organization does not pay for anything besides PC (44%)
    - The organization pays for everything (28%)
    - The organization provides a subsidy (17%)
- In Denmark, it is most common that the organization pays for everything (60%).
  - In Norway and Sweden, this is less common (38% and 28%, respectively). It is more common amongst the respondents that the organization only pays for the PC/laptop (56% and 44%, respectively).

### By Sector

#### What is the main financing method?

(Method with highest % of respondents)

- Consumer Retail** The organization does not pay for anything besides PC (67%)
  - Education** A combination (67%)
  - Energy** The organization pays for everything (50%)
  - Financial Services & IT** The organization does not pay for anything besides PC (50%)
  - FM Supplier** The organization does not pay for anything besides PC, A combination (50% each)
  - Government** The organization pays for everything (100%)
  - Manufacturing** The organization pays for everything (56%)
  - Municipality** The organization does not pay for anything besides PC (55%)
  - Professional Services** The organization pays for everything (50%)
  - Real Estate & Infrastructure** The organization pays for everything (67%)
- Two tendencies emerge: in some sectors, it is more common for the employer to pay for everything (Energy, Government, Manufacturing, Professional Services, and Real Estate & Infrastructure). While in other sectors, it is more common for the organization to only pay for the employees' PC/laptops (Consumer Retail, Financial Services & IT, Municipality).

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