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Workspace 2020 – Club, Hub and Cowork space: business models for optimal FM support for office workers in the future

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ABSTRACT

This paper presents the results of a two-year project called Workspace 2020, aimed to develop a model for the future office workspace. Work preferences are changing; the importance of the added value of workspace for individual and organizational performance is more and more recognized. Facility management (FM) should be prepared to offer the right kind of real estate and service to satisfy the office workers' needs in 2020. Therefore, the central research question is: *what is the optimal FM support for office workers in 2020?* Data were collected in 4 phases. In phase 1 a preliminary vision was drafted, based on extensive literature review and a triple case study. The subsequent triple validation process during phase 2 and 3 encompassed in-depth expert interviews, a survey, and in-depth interviews with FM-suppliers. This paper discusses the key aspects of the future workspace, such as working any place/any time, performance-based management, freedom of choice, and the increasing importance of networks and communities (e.g. for the self-employed). Phase 1-3 resulted in a validated vision, describing three options for the future workspace (beside the traditional office and home office): Cowork space, Hub and Club. Results indicate that large companies will tend to prefer shared service centres. SME's will either opt for complete outsourcing or “buy your own FM”. Cowork space, Hub and Club concepts will create new business opportunities for facility managers in 2020 (phase 4).

Keywords

Workspace strategies, workspace concepts, office workers, business model, new ways of working

1 INTRODUCTION

Nowadays, most organisations experience continuous change. New markets and work processes, economical developments, changing demographics and new technologies are known drivers for

change. However, technology increases the speed of change and its impact on society results in what sociologist Zygmunt Bauman refers to as “liquid modernity” (Bauman, 2000). Solid structures are replaced by flexible and temporary solutions; organisational boundaries fade; hierarchical structures give way to (temporary) inter-organisational networks and partnerships. Many of the networks formed in recent years are based more on information than physical assets. One of the distinctions between the industrial economy and the information economy is the nature of costs (Mauboussin, 2004). Reputation and trust are key issues (SER, 2007). Since change remains the one constant in the workspace all that is certain is that the workspace of the future will be very different from that of today. Consequently, the workspace is in a state of transition, which is having a profound impact upon the way in which organisations plan, design, finance, occupy, use, and manage the workspace (Saurin et al., 2008). With the rise of (virtual) network organisations, the facility & real estate management role changes from service provider and tactical real estate manager to supervisor and strategic manager of “networked business process systems”. Key words are: connectivity, strategic partnerships, flexible, mobile network driven work environment, co-operation, and digital (paperless) in both policy and behaviour (CoRE, 2010).

Work preferences are changing; the importance of the added value of workspace for individual and organizational performance is more and more recognized (Jensen et al., 2012). As real estate is relatively static, the solutions to increase adaptability are related to (work)space concepts and (hospitality) services, business process redesign, legal solutions (FMN & CoreNet Global, 2013). The work environment in 2020 exceeds building boundaries and includes multi-functional areas that combine work, housing and leisure. It is important to incorporate societal, technological and corporate developments, as well as the users’ needs in real estate development (FMN & CoreNet Global, 2013, p. 6). However, the future workforce is characterised by its diverse nature. In 2020 the population of the Netherlands will have increased but the active workforce will be declined, despite a higher participation of women (De Jong & Van Duin, 2011; Tucker, 2012). The majority of the workforce will be Generation X and Y, Baby Boomers are by now retired; Generation Y's preferences for meaningful, independent work, anywhere and anytime, will colour the war for talent (Bontekoning, 2011; Eisner, 2005; Lub, 2013); a sizeable number of professionals will be self-employed; third places and coworking are predicted to become more important (Spinuzzi, 2013). This has important consequences for office-based work, and calls for user segmentation and user-centred design in order to have a satisfactory fit between user and built environment. These market dynamics are the rationale to our main research question: *What is the optimal FM support for office workers in 2020?*

This paper presents the results of a two-year project called Workspace 2020, aimed to develop a business model of FM tailored to the future office workspace. The field research is limited to Dutch office based organisations (> 50 staff). Between 2011 and 2013, experts and managers were asked to describe their vision on the future workspace. As predicting the future is no easy matter, a period of 10 years was chosen, hence the name of the project, 'Workspace 2020'.

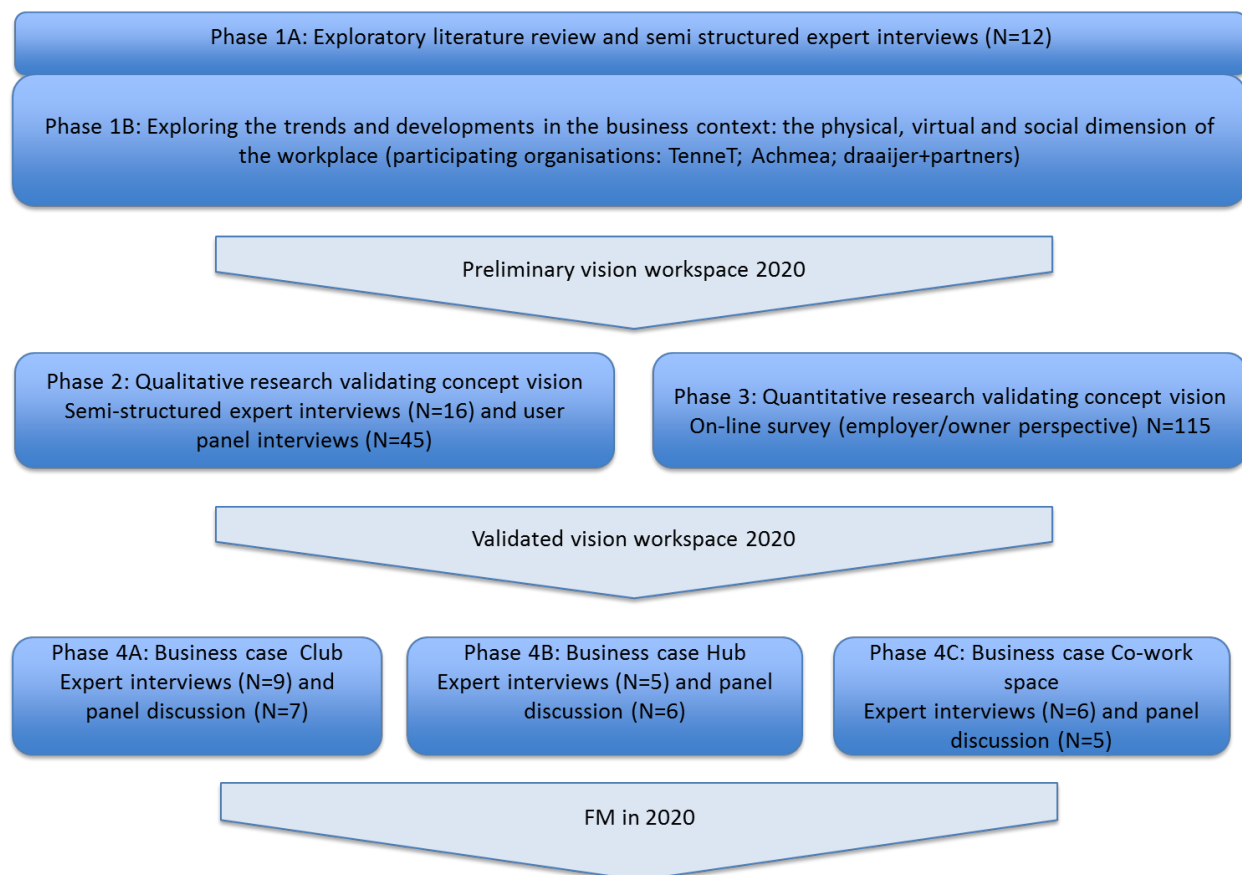
2 RESEARCH METHODS

Data were collected in 4 phases, from September 2011 to July 2013 (See Figure 2). In phase 1a preliminary vision was drafted, based on extensive literature review (1A) and exploratory research in the business context in 3 organisations (1B). The three case organisations represent

specific sectors (profit, semi-government and government), taking into account the size of the organization. The subsequent triple validation process during phase 2 and 3 encompassed in-depth expert interviews (N=16), panel discussions with future user groups (N=45), and a survey focused at core business perspective. A total of 115 respondents, either working as manager or staff in HR department (83%) or with a management position, filled in the survey. These respondents were chosen based on the assumption that they can voice the vision of organisations as well as employees and management.

The majority was female (62%). Male respondents were significantly older than female respondents (47 ± 9 and 39 ± 11 years, respectively; t-test, $p=0.004$). Respondents were working in the profit sector (42%), for the government (27%), or for semi-government organisations (30%); almost one third of the respondents work in the Randstad (32%), and half of the respondents work in the mid-eastern provinces (Gelderland, Overijssel; 49%). The composition of the response shows that the HR departments delivered significantly more female respondents (χ^2 , $p=0.00$), and the mid-eastern provinces significantly more men (χ^2 , $p=0.020$). Furthermore, the distribution of respondents over profit/semi-

Figure 1: Research framework



government and government was significantly different between the three regions (χ^2 , $p=0.027$), with semi-government especially located in the mid-eastern provinces. The result of phase 2 and 3 is a validated vision on Workspace 2020. In phase 4 these concepts were translated to business models using the Business Model Canvas (Osterwalder & Pigneur, 2010). The business models

were completed with the input from entrepreneurs of similar business concepts in the current market (N=20) and panel discussions with entrepreneurs and FM en RE consultants (N=18).

3 RESULTS

This chapter contains – after a short introduction based on the output of phase 1 - the results of phase 2, 3 and 4 of the research.

3.1 Phase 1

The output of phase 1 was a preliminary vision on Workspace 2020:

Work 2020: The knowledge-based economy will shift to a network-based economy. Organisations limit themselves to the core business and will be surrounded by flexible peels of network organisations, experts, and flexible staff. Work will become more project-based, in changing (external) project teams.

Technological developments and economic crisis will tighten the labour market. Organisations will aim for less, but higher qualified staff, whose quality will be an important competitive advantage.

Workspace 2020: New Ways of Working (NWW) will be standard. This trend will cause a rise in the vacancy rate of office building. Only offices on A-locations will survive. Inner city and logistically attractive areas will emerge. Multifunctional areas and buildings will be the solution for the ever- changing demand for work environments. There will be a broader offer of workspace concepts. Organizations will focus on availability instead of possession. There will also be more attention for life cycle asset management. In 2020 three workspace concepts (besides the traditional office and home-office) are identified with future potential:

1. Club: organisations' headquarters aimed at organizations' core business; internal focus, facilitating collaboration and knowledge sharing (part of former traditional office).
2. Hub: regional office for short/mid-term use of space, focused on task performance (solo or team); compared to the former satellite concept in 2013 this concept is more user centred, and facilities possibly shared with other (external) companies to improve occupancy rates.
3. Co-workspace (former 3rd place): regional work and meeting space, commercial short/mid-term rent of workspace, added value: high accessibility and network-centred.

FM 2020: focus on cost reduction will change to maximising added value. Traditional FM will turn into FM intra- and entrepreneurship. End users will have more influence on the configuration of their workspace and tools. Buy your own FM will be more and more the standard. There will be a various offer of business models, depending on the size of the organisation:

- large (>250 employees) => Shared Service Centres in combination with an increase of outsourcing of FM activities
- medium (>50 employees) => facility sharing (with other organisations)
- small (<50 employees) => be your own FM

3.2 Work in 2020 (phase 2 and 3)

In 2020, the work force will consist of Generation X (1965-1980), Generation Y (1981-1995), and Generation Z (>1985) (Eisner, 2005). Generations have been shown to have different needs,

expectations and skills (Bontekoning, 2007; Howe & Strauss, 2007; Lancaster & Stillman, 2005; Lub, 2013). A shortage of skilled labour is expected, as the younger generations will need to replace the retired Boomers (CBS, 2010). Increased productivity will not be the sole solution, and companies may have to compete for talents (Phillips & Roper, 2009; Ware & Grantham, 2003). Furthermore, as life-long employment with one company is decreasing rapidly, and employees' loyalty to their organisation is being replaced by loyalty to their profession, attracting and retaining staff will become crucial for business success. Twenge et al. (2010) found Generation Y to be quite self-confident, to have high expectations from their employers, and to be more likely to leave the organisation if their expectations are not met. In this respect, it is important to envision workers' preferences for 2020.

Satisfaction with supervisor is an important factor in job satisfaction (Babin & Boles, 1996; Newsham et al., 2009). One of the characteristics of new ways of work is that employees will work anywhere/anytime. This requires emphasis on trust in the relationship between an employee and his/her superior, resulting in performance-based appraisals. Cook and Wall (1980) define trust as the extent to which one is willing to ascribe good intentions to and have confidence in the words and actions of other people. According to Van Baalen et al. (2007) "performance appraisal on results will increasingly become more important within organizations, whereby it is important that employees feel they are rewarded for their performance." Therefore, we asked respondents to indicate preferred leadership style for 2020. The majority of the survey respondents indeed indicated that the preference for 2020 is managing on trust and performance (70%), with supportive leadership in second position (17%).

In 2020, the importance of networks and communities will increase (Palmer, 2006; SER, 2007; Johns & Gratton, 2013). To meet the required quality standards and level of flexibility, temporary teams will be common. Team members are selected on their added value, and will increasingly be self-employed (Spinuzzi, 2012), or employed by multiple organisations on smaller contracts. The survey respondents predict that in 2020 20-40% of employees will have a flexible contract; men predict a higher % of flexible contracts than women (Mann-Whitney, $p=0.016$). This increase in flexible contracts is in line with current predictions (European Commission, 2007; Holtshouse, 2010)).

In 2020, the office worker will enjoy more freedom in exchange for increased responsibilities. Time and place independent work is standard. This will suit employees' need to balance work life and home life (Edwards et al., 2006; Sok et al., 2014). Output specification is supported by IT. A quarter of the respondents predict that all information will be available anytime anywhere, most state that it will be available partly within and partly outside the office (74%). This has an enormous impact on cooperation within and between organisations, and on staff recruitment. Only 3% of survey respondents' expect staff in 2020 to work on a fixed schedule during office hours; 74% expects a combined fixed/flexible work schedule. Others (mainly male; χ^2 , $p=0,015$) predict that schedules will be completely flexible (See Table 1).

The relative importance of employment conditions is changing, caused by changing labour contracting. Respondents most value aspects like a pleasant atmosphere at work, and a meaningful job. Payment comes second. Generation Y is thought to be less loyal towards employers, and therefore be more inclined to change jobs when quaternary employment conditions are not fulfilled (Holtshouse, 2010).

The relative importance of employment conditions is changing, caused by changing labour

Table 1: Importance of employment terms and conditions in 2020 (N=115).

Employment conditions		Mean	Sd
Primary	remuneration	3,85	,596
Secondary	e.g. holidays, leave, lease car, access to training, career prospects	3,64	,703
Tertiary	in-company facilities: canteen, staff outing, office design, fitness room	3,43	,928
Quartary	e.g. work atmosphere, meaningful work	4,37	,705

contracting. Respondents most value aspects like a pleasant atmosphere at work, and a meaningful job. Payment comes second. Generation Y is thought to be less loyal towards employers, and therefore be more inclined to change jobs when quaternary employment conditions are not fulfilled (Holtshouse, 2010). ANOVA showed no significant differences in importance of the 1st, 2nd, 3rd and 4th level employment conditions, respectively; the post hoc test (LSD) revealed that the government is predicted to value 2nd employment conditions lower than the profit sector (1-sided Anova, LSD; $p=0.032$) and quartary employment conditions lower than semi-governmental organisations (1-sided Anova, LSD; $p=0.018$). There is no moderating effect of job position, gender, or region.

Conclusions on work in 2020: the increase in flexible schedules and temporary jobs (by choice of the employee as well as the employer), combined with preferences concerning employment conditions reflects an increased importance of the quality of the interaction between employees and organisations. Currently, a sizeable proportion of the workforce has temporary contract, or is self-employed. This trend will continue. If the predicted shortage of labour will occur, then employer need to pay attention to quaternary employment conditions to attract and keep motivated employees.

3.3 Workspace in 2020 (phase 2 and 3)

Gensler's 2008 Workspace Survey shows that the physical work environment is an asset with a specific and quantifiable impact on business success: top-performing companies have significantly higher-performing work environments than average companies. In today's environment - where work processes must change quickly in response to customer demand and competitive pressures - the workspace must be highly agile. "Agility means more than having buildings and communication technology ready for alternative uses. It means continuously improving work and the infrastructure that supports it. Agility requires a dynamic relationship between work processes, the workspace, and the tools of work. Each must respond to changes in the others. Thus, the agile workspace must be co-invented with work. The agile workspace is also a system - a bundle of occupancy, connectivity, and managerial services that interact with the particular work of the organization" (Bell and Joroff, 2003). Contradicting the trend of globalization, our qualitative research indicates an increased focus on regions and local communities. Cooperation and co-creating are core aspects in this development. This increased focus on regional communities may be explained as a counter to urbanisation. Regions like Zeeland, Limburg and Groningen are faced with a decline in population, against growing urban areas like the Randstad. This influences the RE strategy of locations for organisations; access to potential workforce is important in the war for talent.

The added value of the physical workspace is meeting others, sharing knowledge and ideas and for networking (Van Baalen et al., 2007; Gensler, 2008). Knowledge creation is an important

outcome of collaboration. Research at MIT showed that people were five times more likely to turn to another individual for information than to search a non-human source such as a file or database, pointing to the value of interactive work as a business asset. It is estimated that over 70% of what people know about their jobs is gained through everyday interactions with their colleagues (Gensler, 2008). Appel-Meulenbroek (2010) found that spontaneous informal interaction is a better predictor for innovation than scheduled formal meetings.

Regarding the location of workspace, the in-company office and the home office are predicted to be used by almost all respondents; working on the road, in the office of clients or partners, and in third party offices is mentioned by about one third of the respondents. These results show a number of significant differences between respondents based on position, sector, and region: HR managers predict a significant higher use of in-company offices, the profit sector has a significantly higher preference for working on the road and at client's offices, and in the Randstad network partners and restaurants will be more popular according to the respondents (Table 2). Due to the fairly conservative view from HRM on the in-company workspace may have consequences on the speed with which organisations implement new ways of working. Furthermore, it was expected that profit companies work in remote locations, because they have a more externally orientation. The higher use of grand cafes and restaurant for to work in the Randstad is probably caused by the more extensive offer of these kind of establishments.

Table 2: Workspace locations in 2020. P= profit; SG = semi-government; G = government

Location	N	Position	Sector	Region
Office in company building	106 s(92%)	χ^2 , p=.026 more HR	-	-
Home office	96 (84%)	-	-	-
On the road	42 (37%)	-	χ^2 , p=0.036, P>SG>G	-
At client's office	46 (40%)	--	χ^2 , p=0.001, P>SG,G	-
Grand cafe or restaurant	21 (18%)	-	-	χ^2 , p=0.024*
Network partners of my company	36 (31%)	-	-	χ^2 , p=0.043**
Third party offices	34 (30%)	-	-	-

* Mostly Randstad; ** More Randstad + Eastern Region

Accessibility by car will not change according to 74% of respondents; significantly more managers than HR staff predict a deterioration in this accessibility (Mann Whitney, p=0.020). However, new ways of work are supposed to improve accessibility, a mere 9% of respondents think that accessibility will decrease. The profit sector is more positive in its answers than (semi)government (Kruskall-Wallis, 2-sided, p=0.04).

Respondents predict that in 2020 20-40% of employees will have a flexible contract; men predict a higher % of flexible contracts than women (Mann-Whitney, p=0.016). Only 19% of these flexible contracts will always have a workspace; more than half of the respondents think that less than 50% of the flex workers will have a workspace in 2020. There are significant differences between profit, semi-government and government (Kruskal-Wallis, p=0.004). Representatives for governmental organisations predicted the lowest number of workspaces for flexible staff.

Figure 2: Present work concepts (2013)

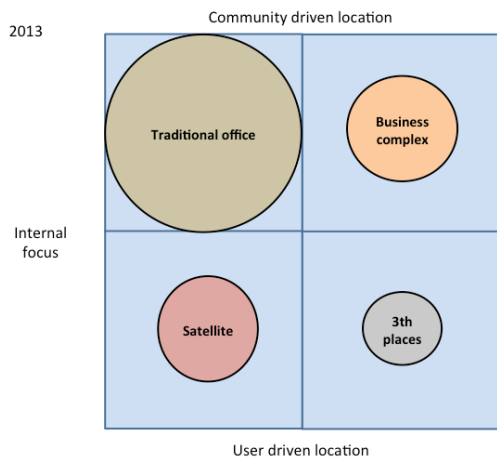
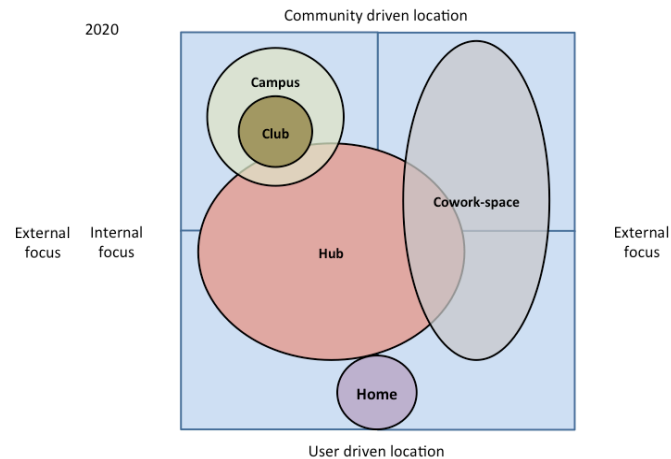


Figure 3: Workspace concepts 2020



In 2013 we see a dominant position of the traditional office (combined with flexible use of home office). Larger organisations may have satellite offices in the region, but will share their surplus of m², caused by the decrease in staff, with for example business partners. There is an upcoming market for business complexes: multi-tenant buildings with short/mid-term lease contracts. A relatively new development is the 3rd place: short term work (for individuals or business communities) and meeting facilities (max. 1 day), on highly accessible locations like city centres and train stations. Figures 2 and 3 illustrate the different concepts in a two-axes model: focus (internal vs. external) and location (user driven vs. community driven).

For 2020, the results of this study identify the potential of new workspace concepts, as well as the disappearance of others:

1. Club: organisations' headquarters aimed at organisations' core business; internal focus, facilitating collaboration and knowledge sharing (part of former traditional office).
2. Campus: collection of offices centred around a Club, focussed on task performance (former traditional office).
3. Hub: regional office for short/mid-term use of space, focussed on task performance (solo or team); compared to the former satellite concept in 2013 this concept is more user centred, and facilities possibly shared with other (external) companies to improve occupancy rates.
4. Cowork-space (former 3rd place): regional work and meeting space, commercial short/mid-term term rent of workspace, added value: high accessibility and network centred.
5. Home-office (as an explicit place of work).

Conclusion on workspace 2020: the agile workspace must be co-invented with work. It supports a full range of workspaces and facilitates rapid scale-up and contraction. In-company and home office are predicted to be used by almost all respondents, whereas working on the road, in clients' or partners' offices, and in third party offices are less used, with significant influences of position, sector and region. Only a small part of staff working on a flexible contract will be facilitated with a workspace. From a FM perspective this may seem efficient; however, it introduces a serious risk for diminished creation and sharing of knowledge. As a result of an increased importance of inter- and intra organisational networks, future office concepts in 2020 will have a stronger external focus, and an emphasis on facilitating and building communities.

Not ownership, but access to workspace will be the focus of the future. In larger organizations, HRM's have a considerable impact on policies regarding workspace. However, their apparently rather conservative views on workspace may inhibit developments in NWW in these kind of organisations. Smaller organisations will probably develop at a faster pace.

3.4 FM in 2020 (phase 4)

Once facility - and real estate managers begin to think of the workspace as a bundle of services dedicated to support the enterprise's work, and as a network of investment and contractual arrangements, they can move toward a more holistic view of workspace costs (Termaat, 2011). All phases - from planning through systems and facilities retirement - are considered. A good understanding of the added value of the workspace is essential to decide on investment trade-offs between space and IT, and different degrees of infrastructure outsourcing (Bell & Joroff, 2003; Jensen et al., 2012; Termaat, 2011). Agility requires that facility and real estate managers focus on the specifics of work as the driver of workspace design - intertwining their tasks with IT, HRM, and business processes. After all, real estate is not an end in itself; its only purpose is to serve the value-creating activities of the enterprise (Jensen et al., 2012).

In 2004 CoreNet Global described the workspace 2010 in a Workspace Strategist Model; the core characteristic of the model is the integral approach of workspace-related issues. This model is in accordance with the results of our study: in 2020 larger organisations will prefer to organise FM, HR, IT and CREM in Shared Service Centres; they will take well-thought make-or-buy decision, in line with the business strategy. Property Providers should develop new business models, tailored to the needs of availability rather than ownership. Current PPPs are a good example of such business models.

The present study indicates a preference in smaller organisations for a different concept: 'Buy your own FM': users are provided with a personal FM budget – to be spent on workspace, IT, transportation, and tools. This enhances a staff members' freedom of choice, and is a way to respond to workforce diversity. Providers of work and network sites have a great future. Providing an inspiring working environment and continuous innovation are key success factors, with an increasingly important role for the hospitality industry and active participation of user communities. In phase 4 (Figure 2) the Club, Hub and Cowork space concepts have been translated to Canvas business models (see Table 3), each requiring a different role for FM. In the cowork space the facility manager acts as an entrepreneur in hospitality; for the Hub (s)he to supports and facilitates hospitality; in the Club (s)he is host and organisation-based director of hospitality.

Conclusions on FM 2020: Agility requires that facility and real estate managers focus on the specifics of work as the driver of workspace design - intertwining what they do with IT, HRM, and business processes. In 2020 larger organisations will prefer to organise FM, HR, IT and CREM in Shared Service Centres. Smaller organisations will embrace 'Buy your own FM'. Providers of work and network sites have a great future. Providing an inspiring working environment and continuous innovation are key success factors, with an increasingly important role for the hospitality industry and active participation of user communities. Three concepts with great potential for the future are: Cowork space, Hub, and Club.

Table 3: Business model Canvas for co-work space, Hub and Club.

Canvas business model aspect	Club	Hub	Co-workspace
Customer segmentation	<ul style="list-style-type: none"> - Organisation - Staff members/internal users - External visitors/customers * External use appear to be increasingly important for the near future 	<ul style="list-style-type: none"> - Independent professionals - People working near home - Small and Medium Enterprises (SME) 	<ul style="list-style-type: none"> - Unclear user segmentation (all people working time and place independent) - Community related
Value proposition	<ul style="list-style-type: none"> - Identity (most important) - High quality services and facilities - Image - Hostmanship 	<ul style="list-style-type: none"> - Value for money (low costs/high hospitality solutions) - Logistically accessible - Office space and meeting- and workplaces - Flexibility - Facilities and services - Long opening hours 	<ul style="list-style-type: none"> - Connecting - Knowledge sharing - High performance workspaces - High accessibility - Flexibility
Channels	<ul style="list-style-type: none"> - Host(ess) - Intranet - Narrow casting - Corporate communications - Account-/demandmanagement 	<ul style="list-style-type: none"> - Host(ess), or receptionist/security - Website - Social media - Word-of-mouth 	<ul style="list-style-type: none"> - Host(ess) (= internal channel) - Social media - Word-of-mouth - Visibility on the location - Advertisement
Customer relations	<ul style="list-style-type: none"> - Host(ess) - Front office/hostality desk (B2C) - Account-/demandmanagement (B2B) 	<ul style="list-style-type: none"> - Host(ess), or receptionist/security - Free trial - Newsletter - Transparent contracting 	<ul style="list-style-type: none"> - Host(ess) - Brand loyalty - Membership
Revenues	<ul style="list-style-type: none"> - Internal rental/charging - Culture improvement - Image propaganda - Higher employee satisfaction - Additional services (various) 	<ul style="list-style-type: none"> - Rental of premises (primary) - Rental of offices and meeting- and workplaces - Office services - Additional services (secretarialservice, printing, mailbox, etc.) 	<ul style="list-style-type: none"> - Subscriptions - Rental of meeting- and workplaces - Catering - Events - "Social capital" - Additional services (various)
Key resources	<ul style="list-style-type: none"> - The building/location - High quality facilities and services - Additional services (shops, care, Child Services, etc.) - Staff 	<ul style="list-style-type: none"> - The building/location - Facilities (f.e. WIFI, catering, events) - Flexibility and multifunctionality - Additional services (secretarialservice, printing, mailbox, etc.) - Staff 	<ul style="list-style-type: none"> - The building/location - Facilities (f.e. WIFI, catering, events) - Staff - Online platform
Core activities	<ul style="list-style-type: none"> - Offering high quality facilities and services - Supporting meetings and knowledge sharing - Hostmanship - Safety and security - Maintain and operate 	<ul style="list-style-type: none"> - Offering office space, or meeting- and workplaces - Maintain and operate - Services 	<ul style="list-style-type: none"> - Hosting - Maintain and operate - Catering - Events
Key partners	<ul style="list-style-type: none"> - Service suppliers (when outsourced) - HRM/ICT/RE 	<ul style="list-style-type: none"> - Service suppliers (when outsourced) - Larger companies - Franchise partners - Landlord 	<ul style="list-style-type: none"> - Community - Service suppliers (when outsourced) - Franchise holding - Landlord
Costs	<ul style="list-style-type: none"> - Housing (highest) - Purchase and maintain facilities - Staff - Energy - Suppliers 	<ul style="list-style-type: none"> - Housing (highest) - Purchase and maintain facilities - Staff - Energy - Suppliers - Marketing - Contribution Franchise 	<ul style="list-style-type: none"> - Housing (highest) - Purchase and maintain facilities - Staff - Energy - Suppliers - Marketing - Contribution Franchise

4 CONCLUSIONS

The workplace is in a state of transition. This research reports on a 2-year project into current visions on Workspace 2020, based on literature review, expert interviews, panel discussions, case studies, and a survey among HR professionals and managers. Those involved are mostly users of corporate offices, not visionaries; they are aware of current trends, maybe up-to-date with new concepts, but their views may be rather coloured by already existing trends in workspace. Their views are a valuable source of information on what will happen in the near future, but their insight in out-of-the-box concepts is limited.

In 2020 larger organisations will prefer to organise FM, HR, IT and CREM in Shared Service Centres, with a well-thought make-or-buy decision. Smaller organisations will embrace 'Buy your own FM' as a response to workforce diversity and need for freedom of choice as to how, when and where staff works. Providers of work and network sites have a great future. Providing an inspiring working environment and continuous innovation are key success factors, with an increasingly important role for the hospitality industry and active participation of user communities. Three concepts with great potential for the future are: Cowork space, Hub, and Club. Each concept requires a different role for FM: in the co-workspace the facility manager acts as an entrepreneur in hospitality or community manager; the Hub requires the facility

manager to support and facilitate a business-like working environment by providing hospitality; in the Club the facility manager is the host and organisation-based director of hospitality. The task of a facility manager will remain, but question is, do we call them facility 'managers'? Maybe it's better to speak of 'facility professionals': same knowledge, but no more fixed roles.

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