KINNARPS' TREND REPORT
8 CHANGES AFFECTING THE WORKPLACE OF TOMORROW

Kinnarps®

HOW WILL THE FUTURE AFFECT US - OR CAN WE HAVE AN EFFECT ON THE FUTURE?

It is important to look forward - to pause, reflect and analyse what lies ahead on the horizon. That is what we have done at Kinnarps. During 2012 we have worked to gain an insight into the future, to see which areas will have a significant effect on tomorrow's working environments.

We have asked questions- why, how and in what way will people work, meet and learn in the next decade? We have systematically analyzed question by question, market by market in order to find the common denominator for which changes we should expect. It is this trend spotting that has resulted in Kinnarps' Trend Report for 2013.

In short, we see eight big changes. The changes are already apparent in our society, but we believe that they will come to have an altogether greater impact on the way we evaluate our working environment. The changes which we may be able to affect - or choose to be affected by. However we look upon the future, we know that it inevitable will come. Here at Kinnarps, we are choosing to look upon this with excitement!

Hope you enjoy reading.

Per-Arne Andersson
CEO of Kinnarps AB

Per-Arne Andersson CEO of Kinnarps AB

Futurology is the art of scratching before it itches."

Peter Sellers, British actor and comedian 1925-1980

EIGHT CHANGES WHICH WILL AFFECT THE WORKPLACE OF TOMORROW

We can see that working life is undergoing a big change; or rather, several big changes. That is also the reason why you have this report in your hand.

In Kinnarps' Trend Report, we will illustrate the changes that we consider to be particularly important for the workplace. The report deals with eight important changes in the way we work, how we will meet each other and learn things in the future. We are convinced that the offices of tomorrow will look completely different to those we have today. The most important driving forces behind the changes are new technology, new values, globalization and a shift to a thought economy. Therefore we envisage that these eight changes will have a great effect on the workplaces of tomorrow:

1. From end-of-line to "cradle-to-cradle"
2. From bound to wireless
3. From bronze to silver society
4. From surface design to design thinking
5. From hard cash to soft values
6. From solitude to multitude
7. From distraction to concentration
8. From workstation to free-wheeling

THE EIGHT CHANGES IN BRIEF

The changes suggest that future workplaces will be designed to look completely different. This doesn't just mean arranging the furniture in a different way or painting the office a new colour. This means that the design will allow people to work in a new way, in environments that inspire cooperation but also offer a good working atmosphere. Many types of rooms and environments are needed for different activities in which new thoughts and ideas can flourish.

According to the experts we have interviewed, future successful companies will approach the office design process in a more scientific way. They believe that a new type of leadership will emerge which is responsible for keeping track of the organisation's structure and designing a workplace which is most appropriate for the company's profile and capabilities. With the help of today's technology, we can be constantly present but physically absent. We can be on the move but still remain mentally connected to our colleagues.

Our work with Kinnarps' Trend Report has shown us that there are major changes in the workplace as a result of well-known demographic shifts. A large number of 1940s baby boomers will soon retire, and those in Generation Y are entering the job market. However the older generation will not leave the workplace entirely. Many stay on for several years after turning 65. Therefore, we envisage that a society will emerge where 3-4 generations must work together in the same workplace. This could lead to conflicts of interest in the workplace, but it could also create new opportunities for meetings and knowledge exchange. The younger generation will also have new requirements from the working environment. For example, they will want to have lounge areas, cafés and a variety of different meeting places. They also want to have the opportunity to choose where and when they work. The older generation, who are often managers, will need to be able to deal with all these new demands. Additionally their work style may be different, for instance with a greater need for quiet areas for concentrated work.

The activity-based work which is now emerging, will lead to new ways of holding meetings and interacting. This can benefit the company through greater productivity and creativity. When the employees can control their daily lives themselves – in collaboration with others – they become more effective, happier and more motivated.

We need all of our employees and partners to share ideas, develop new thoughts and create new concepts. These collaborations are based on meetings, and these meetings can either be scheduled or happen by chance. A huge range of ideas and meetings can happen in an office with different types of meeting areas – big and small, formal and informal, quiet or noisy, with or without food or drink. Our experience

has shown us that companies which move towards activity-based work become more competitive and can stay ahead. They can also attract the best talent, as a well-designed office is an important factor to potential new employees.

The studies we have used and the interviews conducted also show that companies must work on their values and culture in order to attract talented employees, particularly young people. Hard cash is no longer enough for the new generation of workers entering the job market. They would rather that the employer is reliable and down to earth, and that the company has a culture where attitude and not just revenue is rewarded. It is important to them that the company is socially responsible and has excellent environmental standards.

To summarise what we have found, we can see that the offices of the future will be based around activities. Nobody will have a specific seat and everyone will be able to choose where they want to work at any given time – the situation will control what is needed. Employers need to create an open and attractive space for both individual work and for meetings. Work surfaces which are creative, flexible, inviting, functional and customised both for today and tomorrow. The design needs to contribute to good health, job satisfaction and increased creativity – enabling us to strengthen the company's brand.

* What distinguishes Generation Y is, among other things, mobile telephones and personal computers which have been present almost their entire lives, and the internet (which began to have an impact among the general population in 1995) has been normal since they were young.

THOUGHT ECONOMY

We hope that this report can be used as a starting point for strategic talks about the trends and changes which we have identified. Trends and changes which will lead to the emergence of a new society and a new economy. Mats Lindgren, MSE, PhD in Economics, is founder and CEO of Kairos Future, and has predicted a new era for thought economics in his new book "21st Century Management – Leadership and Innovation in the Thought Economy". It is primarily about an era where competitiveness is based upon cognitive abilities; abilities which produce as many powerful ideas and concepts as possible.

The evolution of societies, from the era of raw materials to the era of thought[1]
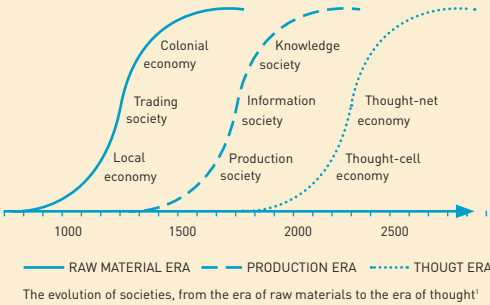
Mats Lindgren believes that while traditional means of production has consisted of labour, capital, raw materials and technology, the thought society (T Society) is an entirely new factor. This new production factor consists of information, patents, ideas and other products which are created and used through the power of human thought. The idea is therefore the new critical production factor in the Thought Economy (T Economy).

In this report we can see trends that suggest that Mats Lindgren is right in his ideas. We can see a hunger for experiences, where the workforce is always looking for new experiences and change. It means that a company that can provide its employees with projects offering self-realisation, transformation and a sense of belonging is a company that everyone will want to work for. This in turn creates a whole new game plan for designers of future workplaces and office planners, as well as for us at Kinnarps, who must consider how to plan for tomorrow.

[1] Figures from Lindgren, Mats (2012), 21st Century Management, Palgrave-Macmillan

> *"There is a really significant aspect which increasingly affects people's values, namely that of ecology and sustainability. Products which have serious sustainability credentials are becoming a basic requirement for all types of products – it is no longer something special."*
>
> Martin Cook, Head of the Interior and Graphic Design Group at BDP, UK

1. FROM END-OF-LINE TO "CRADLE-TO-CRADLE"

We are becoming more aware of our surroundings, as sustainable values such as the environment, society and the economy are becoming increasingly important. We talk about the 3 P's – Planet, People and Profit. These values and how they are integrated in companies and organisations will be crucial for attracting future employees. We are no longer talking about an end to the cycle, but caring about what happens long after we are gone.

Authorities and employees require companies to act in a new way. Thinking only about the end product is not effective and a more sustainable approach is required. It is no longer acceptable to simply be a 'green' company – sustainability must be an integral part of the business.

"As the world's population is growing dramatically, there is a great demand for products and services. It will lead to a lack of natural resources and raw materials, and I believe that consequently we are going to experience a ramatic increase in the price of goods."
Liv Tveter, MD, Kinnarps Norway

GREEN OR NOT?
"This is a strong and important trend. You can no longer distinguish yourself from the majority by caring about the environment – it is now expected that everyone does what they can. Care for the environment will become more and more important in the future, and it will take a generation or two before we get there. In order to attract new talent, you need to be aware that they will thoroughly research your company. They are interested in how you handle the question of sustainability and what values you stand for."
Derek Barker, MD, Haskoll

The studies we have used show that more and more companies are investing in sustainability. It has become favourable to care about the environment. According to research by UCL (University College London), companies which invest in sustainability experience increased productivity. Research evidence shows that companies which assume a green profile are 16 times more productive than companies which do not. This reflects a change in attitudes among the younger generation, who are more interested in working for employers who share their own values. Environmental issues are no longer reserved just for environmentalists. So how can you make an office more environmentally friendly and sustainable? As it stands, there are various different ways to define sustainability. The most basic way to describe our efforts is to minimise the individual's or society's requirement for natural resources. However, in the past few years a more holistic approach has begun to be more appropriate. More and more companies have adopted the so called 3P's – Planet, People and Profit – which means that that they care about the environmental, social and economic footprint that they leave behind. It is not enough just to consider carbon dioxide emissions, you also need to think about the materials which a product is made of (a building, a piece of furniture or a type of machine), as well as how the product can affect society and what will happen to it without waste instead of just reducing the amount of waste. The sustainability aspect is taken to a whole new level as we have seen at the Netherlands Institute for Ecology (NIOO-KNAW) which has decided to adapt its laboratories and office complex entirely according to the cradle to cradle concept.

"An environmentally sustainable working life? Of course! Users are becoming more and more demanding and it is happening NOW!"
Christina Bodin Danielsson, PhD, Architect at Brunnberg & Forshed Arkitektkontor AB and researcher at the Stress Research Institute, University of Stockholm.

SMARTER SUSTAINABILITY
Focusing on environmental sustainability is economically advantageous. The costs of different types of resources, not least energy, are constantly increasing. It is

> *"An environmentally sustainable working life – of course! Users are becoming more and more demanding and it is happening now!"*

when it is no longer required. An example of this is in the neighbourhood of Augustenborg in Malmö, where the residents themselves are involved in determining how the area is designed. The aim is to create an attractive, multicultural area with minimal carbon dioxide emissions.

The term *"Cradle to cradle"* is a registered trademark of McDonough Braungart Design Chemistry (MBDC) consultants and describes way of thinking in which people, products and the structural environment are all seen as part of a shared ecosystem. The focus is on creating a system entirely

therefore important to think about resources in a smart way – environmentally sustainable offices are more energy efficient, which minimises the company's costs for energy and other resources. In some countries, companies which have energy efficient offices are rewarded with tax breaks. Businesses also need to act responsibly and provide accurate reports in order to cope with the competition.

A study by PWC (Pricewaterhouse Coopers) on buildings of the future, shows that sustainability is an inevitable aspect which will become more and more important over time. Regarding sustainability as a smart way of conducting business will become even more important when the statutory environmental requirements increase. In the UK, all British companies must measure their carbon dioxide emissions according to the energy efficiency plan, CRC Energy Efficiency Scheme. This means that certain companies have to buy government carbon credits in order to stay below their emissions cap.

We are also seeing that higher and higher sustainability requirements for offices are being implemented in terms of design and performance. Many companies have already adapted themselves to the developments, amongst them is PwC's new building, which is the first office building in the UK to have the environmental label BREEAM "outstanding". Requirements for sustainability are driven by both market requirements and legislation, and they are becoming more and more important for all involved. But of course, it is not enough that the buildings themselves be environmentally friendly. On the inside, i.e. the working environment and all the technical facilities, these must also be sustainable and designed according to methodologies such as the cradle to cradle concept. Furthermore, office staff must act in a sustainable way, something which they need help with. Furniture, the working environment and all technical facilities must support, not undermine environmental sustainability. It also has an effect on the companies' ability to be classified by environmental standards such as BREEAM and LEED.

SOCIAL SUSTAINABILITY
It is not just environmental sustainability which companies are striving for. We have seen that CSR – Corporate Social Respons-ibility – has become a big trend as more and more companies want to show that they are acting in a responsible way. CSR shows that companies care a lot about society and not just the environment. It is extremely important that they attract investors. CSR is simply becoming a must, especially since 88 % (according to a PwC Survey: "Millennials at work 2011") of all recent graduates and young professionals consider an employer's social responsibility an important factor when applying for jobs, and 86 % say that they would consider changing job if their employer no longer lived up to their CSR commitment. In order to attract new talent and get them to stay,

companies must work on their public image and also deliver on their promises of social responsibility. This is important as more and more companies have begun to publish information on their CSR work. A study by KPMG has recently shown that 95 % of the 250 biggest companies in the world now publish reports on how they are working to take social responsibility. They are leading a big trend in Europe, where more than 70 % of the companies in the study (both small and medium sized) produced reports on their CSR work. Therefore companies must not only take into account different environmental aspects but also make social considerations. It has become increasingly common for companies to encourage staff to volunteer, both locally and abroad. An example is Unilever, which offers its staff the opportunity to work as volunteers in India for six months as part of their normal work.

CASE STUDIES
Plantagon is currently working on its first building in Linköping. It is the world's first vertical greenhouse, with a research centre for urban agriculture on one side, and 4000 square meters of fertile ground on the other side. It is estimated that 300-500 tonnes of vegetables could be produced each year in the greenhouse. For more information visit http://plantagon.com

PwC's new office at More London Riverside is the first office building in UK which has been certified as "outstanding" by BREEAM. The whole building is designed in an environmentally sustainable way with features such as waste recycling, bicycle parking spaces and systems which ensure that less paper is used in printing and that less heat is wasted. Insects and birds which have not been seen in central London for many decades have begun to nest on some of the rooftops of the buildings.

IUCN (International Union for Conservation of Nature and Natural Resources) has its head office in Gland, Switzerland. When the office was built, every detail was assessed in terms of its environmental impact. They wanted to ensure that the building fulfilled the requirements for an economically viable, green building, from the selection of raw materials to the furniture and interior design. Kinnarps was selected to plan and design all the offices and public areas.

QUICK GUIDE

New sustainability values are breaking through, especially in the form of 3P thinking (Planet, People, Profit – i.e. companies take environmental, social and economic responsibility).

New laws are forcing companies to act in an environmentally sustainable way.

The question of sustainability is not only important for companies' images, but also for attracting the best staff.

CSR (Corporate Social Responsibility) is becoming increasingly important to clients.

CSR, environmental sustainability and profitability are closely linked.

2. FROM BOUND TO WIRELESS

The Thought Society is moving towards making the 9-5 job increasingly rare. Work finds its way into all aspects of our lives, whether it be during the day, evening or weekend. Our mobile phones and tablets are the Swiss army knives of today, as they are used for everything. Managing mobile workers is becoming increasingly important as mobility is now a way of life. Companies must adapt.

"This area will be developed, especially since more and more people are choosing to go out and chat on their mobiles, or sit in a café and use their laptops to get some peace and be able to concentrate properly – something which is difficult in today's offices. "

Derek Barker, MD, designer and architect,
Haskoll, UK

We can already see that our jobs and offices no longer look the way they used to. As technology integrates itself more and more into our lives, everything is going mobile – from our jobs to the way we shop. Technology has led to a revolution within the workplace and is slowly breaking the chains which have long tied office workers to specific places and times. We are entering a fully wireless era!

"Within five years, bandwidth will be so great that we will no longer need any cables. It is a big, big change... A change which means that technology will no longer be a problem. The new challenge is how to keep people motivated – it's about leadership, commitment and inspirational spaces. In the future we will be able to choose where we want to work simply because we will be able to do so. We are no longer confined, but free. The idea of being part of a company is

of a fixed workplace where people go to work. But this is changing dramatically. The traditional image of an office worker is someone who comes into the office at 9 o'clock and clocks off at five – this is no longer the case. We are seeing a new generation of office workers emerging – a generation which is always ready to work, regardless of place or time. They are always on standby and are ready to work wherever necessary. Work is becoming a natural part of our daily lives, without fixed times or places. *"In 2020 I actually believe that we will see more and more fully wireless companies, and at the same time, I think there will be so few fixed devices that they will have almost disappeared."*
Tim Oldman, CEO, Leesman Index, UK

It is primarily the development of mobile technology and the internet that has driven

mobile operating systems such as Apple iOS and Google Android than there was in Apollo 11 at the time of the first moon landing. It is no wonder that we are moving towards a more cybernetic way of working since we have our third brain (our mobile phone) constantly on standby.

"In 2020 I actually believe that we will see more and more fully wireless companies, and at the same time, I think there will be so few fixed devices that they will have almost disappeared"

completely psychological – it's about a feeling of togetherness more than anything else."
Martin Cook, Head of the Interior and Graphic Design Group, BDP, UK.

"This area will be developed, especially since more and more people are choosing to go out and chat on their mobiles, or sit in a café and use their laptops to get some peace and be able to concentrate properly – something which is difficult in today's offices."
Derek Barker, VD, Haskoll

A STREAMLINED WAY OF WORKING
The word 'work' makes most people think

this development which is rooted in people's desire for new things. It has led to a more fluid way of working – we no longer work in fixed places and at fixed times, but rather we work when necessary. Access to the internet is actually considered so important that the UN included it in their list of basic human rights in 2012.

There is no doubt that technology is becoming increasingly important for all of us. This development is driven by our need to make our lives easier. According to Nancy Gibbs, a writer for Time Magazine, there is now more computing power in
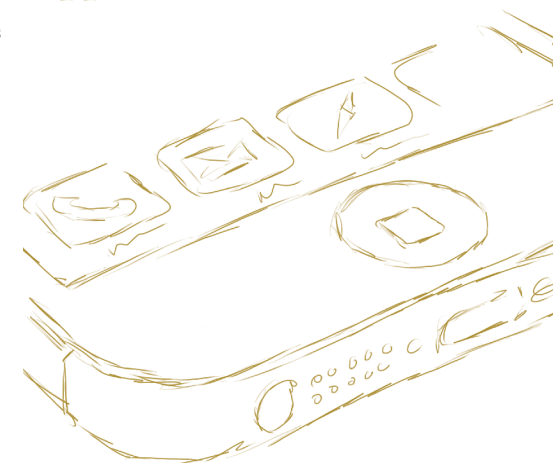
We are always connected and ready to work at any time, but this of course has an impact on our lives outside of work. We are mixing business with pleasure like never before. An example of this is that it has become normal for staff to choose to combine business trips and holidays, for example by staying an extra day when abroad.

"Dead time in front of the computer will become less common in the future as we can be somewhere else and not be tied to a screen."
Sara Córdoba Rubino, Researcher and Project Manager, Meta Products and Booreiland, Netherlands

However, we are seeing various reactions and counter trends. This is because more and more people are becoming aware of the risks of constantly being connected. For example, in the UK and the USA there is a lot of talk about the so called "CrackBerry effect", i.e. the addictive effects of mobile phones. In Germany, many companies, including Volkswagen, have chosen to shut down their email servers outside of normal working hours in an attempt to minimise the effects of dependence.

"Here in Norway, I can see a clear trend in that people are not actually talking on their mobiles on the underground, on buses and in public areas. I think that more people consciously avoid looking at their mobile devices whilst talking to others. This is a learning process that is going on at community level. The younger generation is better educated and is more aware of social media and how it can be used without becoming a burden on their everyday lives."
Liv Tveter, MD Kinnarps Norway

NEW REQUIREMENTS FOR COMPANIES AS MOBILITY INCREASES

"We have an exciting challenge ahead of us since increased mobility means that there is a need for a new kind of leadership if people are to want to work for a company."
Martin Cook, Head of the Interior and Graphic Design Group, BDP, UK.

A British study (Connected Britain, Orange 2009) has stated that 67 % of all participants would choose to work from home if they could, at least on a part time basis. The definition of an office is changing, and therefore there are new demands on managers. Managers of companies who have adapted themselves to the new and flexible way of working, must lead the work in a different way. Methods of leadership which focus on agility, speed and confidence will be necessary in the future. More and more employees are now working in places other than the office, and it is very important that they know that their bosses have faith in them. This development has many positive effects, such as making staff

happier and more productive. According to the research company YouGov, 30 % of workers in Britain think that flexibility at work makes them more productive, and 43 % feel that it reduces stress.

"The increased use of wireless devices which employees themselves bring to work (BYOD – bring your own device), and the use of cloud services from home (for example iCloud or Google Drive) are factors which provide exceptional flexibility in the workplace and in terms of how people work together. We are no longer limited in terms of location, and in principle, we can work wherever we like. This is something which we must consider when we are designing workplaces."
Ian Weddell, Commercial Manager, Kinnarps UK.

We have also seen that as more employees become better versed with technology, the demand on employers to provide various technical tools increases too. If companies want to strive for efficiency and retain employees – especially the really talented ones – they need to be able to provide the most up to date technical tools which are as good as the products which their staff is using at home.

A Swedish study by Manpower together with Kairos Future showed that only a quarter of participants felt that their technical needs were met in today's workplaces. Problems with technology, such as with wireless connections, have led to an occasional decrease in efficiency. The same study stated that a third of the employees questioned brought their own technical devices to work. According to a 2012 study by Citrix (of 19 countries around the world, for instance Germany, the Netherlands, the US, the UK. Japan, South Korea, etc.) 83 % of all companies have a policy that says that staff must bring their own technical devices to work. Since some of the technical tools that are used in the workplace are privately owned, the line between work and free time becomes even more blurred.

OFFICES OF THE FUTURE

Some people are now wondering if offices are going to disappear entirely. It may seem like that is the way that things are going, since many companies are determined to reduce their office space by 2020 (most are suggesting a 20 per cent reduction) However the office is not about to die out - it will simply evolve.

"Work is becoming more mobile, many people go to work in places other than the office, but not everyone is working from home. People will work wherever they can in order to make the most of their working hours. However, office space will still be needed."
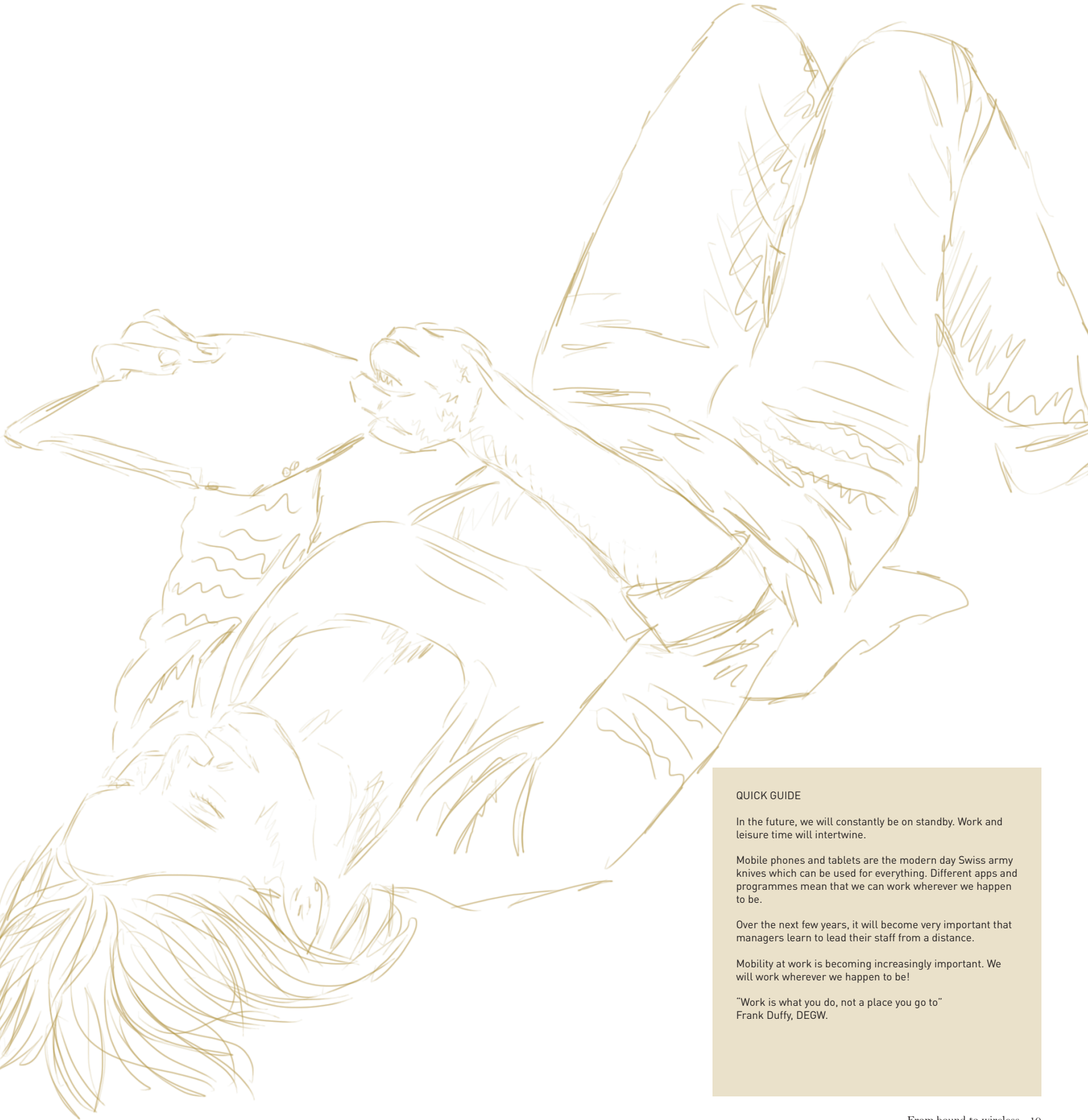Beata Osiecka, Managing Director at

Kinnarps Poland
We have seen that at present, the office functions more as a place where staff can meet and work with others in order to increase productivity. It is not a particularly surprising development since more and more employees effectively have an office in their pockets in the form of their mobiles (where they store documents, contacts and emails). Urbanisation has meant that we live in smaller areas, and many of us no longer have room for a desk and a chair at home. Instead, we go somewhere else to work, social clubs or cafés, and the office.
The internet has revolutionised the way we look at work. Nowadays, everything is just a click away, online and easily accessible so that we have a permanent working space that follows us wherever we go.

CASE STUDIES

The Hub is a collaborative workspace; a place where people with different professions and (cultural) backgrounds can work together. It is a place where all companies can access things which would otherwise cost them a lot, so that they can put time and money into their work.

Another example is United Space, Stockholm. Just like The Hub, they gather multiple companies under the same roof. However, it is not primarily a place for collaboration, but works more as an office station. It is just as flexible as The Hub but there is no requirement for companies to collaborate. However, the fact that companies are sharing the same space leads to random meetings with possible clients or collaborators.
The idea with both The Hub and United Spaces is that companies can use their office space to the maximum, while the premises provide optimal opportunities for meetings and new business. Having people of different backgrounds together leads to the emergence of new ideas. Meanwhile, the office space is being put to maximum use.

> *"For the first time, we have four
> generations in the workplace and this
> means that everyone must thrive and find
> their own individual ways of working.
> It is important to remember that a 70 year
> old and a 20 year old have completely
> different needs in the workplace."*

Henrik Axell, Concept Developer of Kinnarps' Activity
Based Working Environment, Kinnarps Sweden.

3. FROM BRONZE TO SILVER SOCIETY

Retiring at a standard retirement age is no longer a matter of course. We both want to and need to work longer into old age. The working environment must therefore be suitable for attracting both young and old. It is about using the competencies which different generations possess and getting them to work together. It is about motivating everyone.

We are seeing that Europe and larger areas of the western world are undergoing big demographic changes – we are getting older. It is not just the average age of the population at large, but also the average age in the workplace. The world is moving from a bronze to a silver society, a development which is happening very fast and is affecting all aspects of work.

"I can see that there has been an important change in how people look at ageing. I think there is some truth in the saying that 60 is the new 40. I'm sort of only half joking, but the fact is that I still feel 30. A senior young person – that's me! We want to look modern, and I think that goes for clothing, furniture, colours and so on."
Derek Barker, MD, designer and architect,

of us. There will be more silver-haired people who are healthier than in the previous generation. For many of them, including myself, work is a lifestyle and I will never want to retire."
Martin Cook, Head of the Interior and Graphic Design Group, BDP, UK.

LIVE LONGER, WORK LONGER
We might be working longer. But at the same time, we are living much longer because of health improvements. Every generation has an increased life expectancy, and the 1940s baby boomers, who are now nearing retirement age, expect to live longer than any previous generation. According to Eurostat calculations, people who are over 50 today will live five years longer than the previous generation. This

In 2011, Eurostat predicted that the proportion of people in the EU of working age (15-64) would halve by 2060, i.e a decrease from a quarter to an eighth. It means that social support systems will continue to be depleted. This in turn means that despite their increasing age, the pressure on the older generation to work longer will increase even more.

"As a society we can no longer justify people being pensioners for over 20 years, when they can still work and contribute. But if older generations start working, we need adapt the workplaces for them, with tools such as better hearing devices and ergonomics."
Thomas Fürth, Research Director at Kairos Future.

> *"There will be more silver-haired people who are healthier than
> in the previous generation. For many of them, including myself,
> work is a lifestyle and I will never want to retire"*

Haskoll, UK
"We are seeing that the older workforce will work longer in the future. It's about utilising their skills and experience. I think that the experience of the 1940s baby boomer generation provides support to the younger generation, while Generation Y can convey a sense of being "cool, connected and on-line" to their older colleagues. The mixture has a positive effect on the whole company. Smarter interior design solutions, which encourage different generations to mix, will be increasingly in demand."
Ian Weddell, Commercial Manager, Kinnarps UK
"I believe that we have a fascinating time ahead

change is leading to new opportunities in terms of work and employment. For example, in Sweden it is no longer acceptable to retire at 65, which is the general retirement age. Now that many people live until they are 80, retiring so early means that they spend more than 15 years without accomplishing any kind of productive work. So it is no wonder that governments all over the world are considering raising the age of retirement. Statistics show that of the 27 EU countries, the proportion of the population aged over 55 has increased from 25 % in 1990 to 30 % in 2010, and by 2060 it is expected to be around 40 %.

According to EU statistics, we are also seeing that the proportion of employees aged 60-64 increased from 23 % in 2000 to 31 % in 2010. This is not just because people are feeling pressure from companies and governments – the fact is that different generations actually want to work longer. A study of 1,189 employees of different generations asked whether they could imagine continuing to work after the age of 70. It showed that 77 % of the 1940s baby boomer generation and 82 % of Generation X* thought that they would be able to work that long. This suggests that the transition to a silver society is both necessary and desired by different generations.

ACKNOWLEDGING THE VALUE OF THE OLDER GENERATION

"Having more older people in employment can affect the way in which we deal with the careers of younger employees, how we promote staff and how we design the physical working environment and provide various aids. The older employees' role is likely to change in the future and they will play more of a supportive role."
Derek Barker, MD, designer and architect, Haskoll, UK

A number of changes are reshaping the world of work. One change is that more people want to work longer (since improved health means fewer want to retire), another is that we are experiencing a demographic change which means that there will be fewer young people in the workplace. A third change affecting us is the transition to a thought economy. We are moving towards a society where work no longer involves physical labour, but rather a labour of thought. At the same time there is not enough talent to meet demand. The fact that companies are looking for new talent means that they are more than ever in need of expertise and experience to succeed. Since intelligence is more important that muscle in the thought economy, the best results should be achieved when the cognitive abilities of different generations are brought together. We are already seeing that a generational shift is taking place in our workplaces around Europe. For example, there are workplaces where as many as four generations are working together. The older generation is becoming more and more attractive to recruit. It comes as no great surprise that recruiting platforms such as "Erfahrung Deutschland" and "Age-Broker" in Germany are providing professional support from retired specialists who are genuinely appreciated for their skills and knowledge.

Many want to continue to work after they turn 65. But there are many who experience the height of their careers in their forties. The question we need to ask ourselves is not just how to get the older generation to work longer, but how we get them to feel motivated and happy in their work. It is these types of questions which must be answered to create a working environment where all employees are seen as productive.

ADAPTING TO THE NEW WORKFORCE

When three or four generations are in the same workplace, there will be new demands on the working environment. On one hand, older people have specific needs which must be met, such as better lighting. But on the other hand – and this is something that is often underestimated – they have unique skills precisely because of their age: they have the ability to make wise decisions, they are experienced and are mature as individuals. These are qualities which are always in demand and can be offered by the silver society. The fact is that older entrepreneurs, or 'Silverpreneurs', already benefit greatly from this. In offices where many generations work together, it is important that the working conditions are adapted to suit all employees. It is not just about the physical possibilities in the workplace, it is also extremely important that we take into account what motivates different employees.

Awareness of inclusive design is very important when we respond to this development. This is where cooperation with countries and authorities can be important, since development is a considerable burden on the welfare system. If we succeed in creating working environments which make it possible for people to work further into old age, we can also maintain the necessary experience in the workforce and therefore avoid the funding costs.
"We are going to need more retirement homes and care institutions, and we need to design them in a completely different way, since there will be no staff in the sector."
Liv Tveter, MD, Kinnarps Norway

Every generation has grown up in a different time and has been influenced by the zeitgeist when they were young. The driving forces seem to be different for different generations, likewise the perception of leadership, learning and career planning. According to Collar's 2011 study "Millennials at Work – reshaping the Workplace", cooperation is comparable to formal education for Generation Y. They value the opportunity to work on important projects as much as they value support for higher education or further study.
In another study, "No Collar Work Study" conducted in 2012 by MTV, 89 % of those in Generation Y thought that it was important to be constantly learning new things at work, and PWC's study showed that 50 % of those asked in Generation Y felt that their managers didn't understand the way that they used technology in the workplace. Generational gaps will place new demands on managers and workplaces of the future. Many of the experts whom we interviewed believe that mentorships will become more common in the future. This is interesting since 76 % of those questioned in Generation Y in MTV's study thought that their managers could learn a lot from them, and almost as many wanted mentors. It is obvious that older and younger employees are not interchangeable, but should be seen as complementary. In the future, there may be many more older people in the workplace, but more importantly we will see people from many different generations working together to achieve the best results.

CASE STUDY

The Amazings is a social enterprise in London where people over 50 share their competence and their skills with others. The company offers all types of courses, everything from food to storytelling http://www.theamazings.com/

* Generation X is a term for people born between 1961-1979.

* What distinguishes Generation Y is, among other things, mobile telephones and personal computers which have been present almost their entire lives, and the internet (which began to have an impact among the general population in 1995) has been normal since they were young.

QUICK GUIDE

We are moving towards a change in working life where different generations will increasingly work together - the focus of workplace design is no longer just on the younger generation.

It is very important that working environments are suitable for all generations and their changing needs - different generations are motivated by different things and need different tasks to be considered productive.

The older generation is not going to replace the younger, rather all generations will be utilised to create a common thought platform where everyone can work together.

4. FROM SURFACE DESIGN TO DESIGN THINKING

Taking sick leave is an ever increasing problem. More and more people become ill due to stress. Designing working environments with health and wellbeing in mind will become significant in the future. If we are feeling well, we work well, resulting in increased productivity. It is also about design as part of the employers brand and design for thought productivity.

"The word 'design' refers to a wide ranging concept — it is about finding a solution to a problem rather than just deciding what colour to paint the walls of the reception. It's about a holistic approach to the workplace"

Louise Clarsten, CEO, ColourHouse, Sweden

In the past few years design has started to be taken more seriously, and it affects all aspects of office work on all levels. Design is about more than just the finishing touches – it's about understanding what makes people productive and how to increase efficiency in the workplace. In the future, design will be the key to managing human potential. According to a new study (2013) carried out by Demoskop on behalf of Kinnarps, 94 % agreed that working environments are important in allowing people to be happy in the office.

Well thought out design in working environments results in increased job satisfaction and performance among employees, and made employers more attractive. According to the same investigation, only 1 in 4 are completely satisfied with the working environment at their place of work.
"We are going from designing individual elements to designing a whole environment. More and more people want to live in harmony, and a well-designed environment creates such positive feelings. Design that isn't just about expressing prestige and status is the kind of design for me." Beata Osiecka Managing Director at Kinnarps Poland.
"It is ultimately about developing solutions from a holistic perspective. We shouldn't be designing separate products without considering how the workplace is changing. Similarly, it is impossible to put forward design solutions without an understanding of the client's culture, aims and direction. Separate application of product design and interior design is not sufficient. We need to combine design work with a full understanding of the client's culture and aims – that is the only way to succeed."
Ian Weddell, Commercial Manager at Kinnarps, UK.

DESIGN FOR INCREASING WELL-BEING IN THE WORKPLACE
Everything which we come into contact with has been designed, which includes working environments. Currently, with an urbanisation process that never seems to slow down, a large proportion of the world's population works with tasks which traditionally were performed in office environments. At the same time, office work is changing from traditional and process tasks, to knowledge work and thought production, which means that information, is converted to new ideas, concepts and innovations.

Knowledge workers can often choose where they want to work – yesterday at home, today in the office, tomorrow somewhere else. Since there is value in people meeting each other, it is important to attract the employees into the office. It also helps to keeps them stay innovative and productive. It is especially important from a health perspective since illness associated with metal health is now one of the most common reasons for people taking sick leave. For decades employers have acknowledged that the working environment is important if their employees are to perform well, but now the working landscape (and personal demographics of the workers) are changing, and new challenges are emerging in attempting to meet these needs.
"Natural light, noise levels, temperature and air quality. These things have an enormous effect on how productive we feel and how engaged we are when we are in the office."
Tim Oldman, CEO, Leesman Index, UK

According to the Swedish Social Insurance Agency [Försäkringskassan] (2011), stress is a common reason for taking sick leave in Sweden. There is a strong correlation between the increase in the number of sick days and office design. Research from Ohio State University and the National Institute of Mental Health, showed that people become more stressed if the environment has not been designed in a well thought out way. The study compared new and old buildings (i.e. refurbished and re-designed buildings, and older, poorly designed buildings). It showed that those who worked in the older environments were far more stressed, even when they weren't at work. The stress levels were so high that they increased the risk of heart disease. This shows that design really can increase well-being at work, something which in turn means that design will be a big factor in future office environments. Well-designed offices can simply keep employees healthy. However, it is important to emphasise that it is not enough just to design a new office chair – the whole working environment needs to be designed with health in mind. Research conducted by Christina Bodin Danielsson shows that healthiness and job satisfaction increased in more flexible offices and offices with separate rooms."

"More and more people want to live in harmony, and a well-designed environment creates such positive feelings."

*"The positive experiences of the office environ-
ment were mainly connected to the aesthetic
aspects, while the negative comments were to do
with functionality"*
From "The Office" by
Christina Bodin Danielsson (2010)

*"Sitting for long periods in an airless room will
be seen as unacceptable, backwards and a non-
productive way to work. Some office furniture
will be replaced by new types of activity equip-
ment which reduce the health risks associated
with inactivity."*
Gus Desbarats, FCSD, FRSA, mIDSA,
founder and Chairman of Alloy, UK.

DESIGN AS A PART OF THE EMPLOYER'S BRAND
Health and well-being are key factors in
designing a working environment. How-
ever, there is another important factor to
take into account, namely that design can
be used to strengthen the brand and attract
new, talented employees. In a 2012 study by
Manpower, 33 % of companies in Britain
said that the lack of technical abilities or
hard skills meant that it was difficult to
attract suitable employees. A third said that
it was difficult to attract the right person
even for advertised jobs. It has been much
the same over the past few years. According
to a survey by the American Society of
Interior Designers, those who were happy
in their workplace were 31 % more likely to
be happy in the job itself. Of those looking
for work, nearly half said that how the
office looked would affect whether or not
they took the job.

Today, brands are not just expressed
through communication and the products
and services which they sell. Brands must
express themselves through all the points
of contact which they have with the outside
world. One of the most important contact
points is with the employees. As more and
more companies open their doors to their
clients and the public, the interior design of
their offices becomes an extension of their
brands.
*"We need to get employees to feel proud of their
workplace. It can help if we ask ourselves: Is this
a place that I would proudly show my family?
Is this a place where I would like to bring my
clients? Is this a place I would like to bring my
colleagues? Do I feel proud when showing
visitors around? Pride is important for
companies as a whole. It gives you loyal
employees, who strive hard to represent the
company's brand better."*
Tim Oldman, CEO, Leesman Index, UK

The physical workplace is the key to the
brand. Offices with cubicles, white walls
and sharp, fluorescent light are a thing of

the past. We want to enjoy our workplaces.
From table tennis to green walls – every-
thing contributes to creating more attrac-
tive offices. It is no longer just the function
of the office that counts, rather we are after
things which distinguish us and strengthen
our identity. Regardless of whether the
brand is new and exuberant, or established
and radiates reliability, it can express its
values through its interior design. This is
something which consumers have begun to
get used to. We are bombarded with new
insights – new products are launched at
lightning speed and shopping environments
which offer experiences beyond just shop-
ping are becoming the norm. Plus, the ex-
plosion of online shopping and mobile shop-
ping (shopping via smartphone) has added
to this development. It is almost impossible
to always have the latest things, but the fact
is, this is what many people want. They are
always on the hunt for the latest things.

Some of the experts who we interviewed
believe that it has also changed the expecta-
tions which we have of our offices.
*"Boredom is the worst thing that the younger
generation knows. So how can we create
environments which constantly stimulate us"*
asks Martin Cook, Head of the Interior and
Graphic Design Group, BDP, UK.
It is important to constantly change the
environment in one way or another, both
so that employees remain happy and pro-
ductive, and so that their creativity is not
stifled. This means that most companies and
managers need a complete rethink. In addi-
tion, we need new ways for the employees
to get involved in the on-going process of
developing the working environment.

Some of the experts whom we spoke with
emphasised the increasing importance of
the younger generation's and the new
talent's interest in knowing what value ma-
nagers place on teamwork and cooperation,
how the working environment and organi-
sational culture is formed and developed. In
the interviews, some of the experts said
that that the young talent valued teamwork
even more. It is therefore important that
companies express this – not just through
the general organisational culture, but also
through their actions. Derek Barker, MD at
Haskoll, said that values can be shaped and
reflected by the type of office building a
company has, and by the physical design of
the office.
*"In the future, the office and the furniture will
be an important factor in the kind of culture
that is created"*
Other experts like Martin Cook, Head of
the Interior and Graphic Design Group,
BDP, UK agreed and emphasised that the
quality of the working environment is ex-

tremely important in attracting and
inspiring the right kind of people:
*"The office area itself must have its own charac-
ter so that the architects and designers can create
spaces which motivate employees. This includes
sharing ownership so that there is a collective
mentality rather than an individual one.*

DESIGN FOR THOUGHT PRODUCTIVITY
In the Leesman Index we have seen that
only 52 % of 120,000 questioned said that
their workplace promoted productivity.
Since the human capital is the most impor-
tant and most expensive part of most
companies' budgets, this is a shocking reve-
lation. Companies simply must do more to
increase their employees' productivity.
One way to do this is to create a working
environment which is interesting and stimu-
lating. This is especially important since
neuroscientific studies have shown that the
physical environment is crucial for cognitive
abilities.

Sometimes offices can even help us think. In
a 2007 study by the University of Minneso-
ta, it was discovered that workplaces with
high ceilings lead to more free and creative
thinking, while offices with low ceilings
were better suited to critical and constructi-
ve thinking. In the future, employees will
need to be able to think in different ways,
and therefore we need to create office
environments which can stimulate the diffe-
rent ways of thinking when the employees
need it. Other factors, such as noise, lighting
and airflow, are also important in ensuring
that employees reach their potential. Design
for thought productivity and well-being,
means creating places where employees feel
good and can do their best. Future offices
need to promote creativity, be inspiring and
encourage cooperation. Research by the
Universities of Illinois, British Columbia
and Virginia, has shown that creative
thinking is best stimulated in café style
environments. This means that companies
must create café-like environments in their
offices if they want to stimulate employees
creativity.
*"In the offices of the future, the focus will be on
interaction, to a certain extent on processing, but
mainly on interaction, production and exchange
of ideas. From there, you go on to selling,
auditing and research. Office space must meet
the requirements of these different activities"*
Martin Cook, Head of the Interior and
Graphic Design Group, BDP, UK.

If this is what future working environments
are going to look like, then design
will definitely been seen as something much
more than just desks and chairs.

*"Can we create better working conditions –
either at home or in the office – which give us
more positive energy? We need to think more
about how workplaces can increase creativity"*
Jonas Falk, architect at Strategisk
Arkitektur, Sweden
*"The role of the aesthetic dimension seems to be
underestimated in the debate about what a good
environment is, since the emphasis has traditio-
nally been on functionality. Aesthetics has been
seen as a luxury. The result indicates that the
aesthetic dimension does not just have an effect at
an individual level, but also at a group level, as
it affects how employees perceive the workplace
and the company as a whole.".* From "The Offi-
ce" by Christina Bodin Danielsson (2010)

CASE STUDIES
In June 2009, dtac moved their workforce
from six separate buildings to the new dtac
House in Chamchuri Square in Bangkok.
dtac House reflects the company's desire
to be the employer of choice, to improve
cooperation and communication, to
strengthen the common goal, to increase
creativity and make it easier for the brand
to react quickly to changing conditions.
For staff and clients, the new environment
aims to communicate dtac's brand approach
of *"play and learn"*.

One very interesting office project for the
future was developed by BDP for PWC in
2011. It is a building with 4,500 seats for
6,000 people, and the number is growing
due to the mobile workforce which is not
in the office every day. The office space
was designed after thoroughly identifying
personal activity patterns. According to
Martin Cook at BDP, the investment was
very cost effective due to the flexible solu-
tions.*"The flexibility makes the building
more sustainable and gives the office a
character which appeals to the graduate
talent which the company wants to attract.
"And that was the key. The building should
function as a catalyst for the future. In the new
project at PWC, we are investigating – on a
smaller scale at their regional offices – more
radical changes, such as how we can create
environments almost entirely without normal
desks. We have adopted a university mentality.
The internal environment is more flexible and
democratic. The employees are not designated a
specific seat at all. They work in a way which
suits what they are doing. This doesn't mean
that there is nowhere for them to sit and work –
there are things that could maybe be described as
desks, but which look nothing like the traditional
office systems that we have had for the past 50
years."*
Martin Cook, BDP, UK

QUICK GUIDE

As taking sick leave is increasing, it is becoming all the
more important to design offices which promote health and
well-being.

Design is an important tool which strengthens an
employer´s brand and something which can contribute to
getting employees to be more productive and feel happier
with their work.

Thought productivity can be achieved through environme-
nts where employees feel really good.

5. FROM HARD CASH TO SOFT VALUES

Soft values such as appreciation, dedication and the ability to influence, contribute increasingly to our happiness at work. Salary is less important. The company's own values are also essential when choosing a job. It is also visible that individuals have the same values. Finding out what motivates each individual is something which companies must devote more time to in the future.

"Soft values are becoming more important, and they are in fact what can give a company both hard cash and profitability in the long run"

Thomas Fürth, Research Director at Kairos Future

The search for meaning and authenticity is a prominent trend in today's society and it also affects the workplace. Flexibility, well-being and self-fulfilment in the workplace are becoming increasingly important for employees. Work is no longer a place we go to, but something we believe in and something that is meaningful.
"Soft values are becoming more important, and they are in fact what can give a company both hard cash and profitability in the long run"
Thomas Fürth, Research Director at Kairos Future.

"Things which are important to employees are also important to employers. An employee who feels good is more loyal and engaged, which is an obvious economic advantage for the employer. Employers know that their employees are their most important asset, or perhaps they are more than that: the heart of the company. They therefore do everything to attract them and hold onto them. The standard of the working environment is an important motivational factor and an important part of what they employer is offering in addition to salary and other benefits."
Beata Osiecka, Managing Director at Kinnarps Poland.

INTRINSIC MOTIVATION, AN IMPORTANT VALUE IN THE FUTURE
We are moving from concrete, salary based working environments, to a system with abstract salaries. This is maybe not that strange since working is, to a high degree, affected by how engaged and motivated employees are. According to BlessingWhite's study, Employment Engagement, many employees think that their work is neither motivational nor engaging – just 31 % said that they felt engaged at work.

Employers firstly need to understand that they need to motivate their staff with

abstract rewards to get them to perform as well as possible. Money and status are no longer the most important motivators. That was the case when employees worked in factories and did the same tasks day after day. Since that kind of work can be automated, it didn't really matter whether the employee wanted to work or not. But now that work has changed its focus from tasks to projects, motivation and engagement are becoming increasingly important. There is no longer a production sheet or detailed instructions – work is more or less about what we can do with the pure power of thought. Therefore, the traditional motivational factors do not work. According to an international survey by Kairos Future, the most important conditions for making people feel happy with their work are the ability to influence the working situation, to get affirmation and feedback from managers

and colleagues so that we feel committed to the job and enjoy it.

Daniel Pink has conducted several studies to investigate what it is that motivates people in their work life. His studies show that the best way is to not give employees set rewards, but to use abstract rewards. The studies also show that different types of set motivators can reduce the intrinsic motivation, degrade performance, kill creativity and crowd out good behaviour. Tangible rewards can encourage unwanted behaviours such as cheating, leading to dependency and short term thinking, where

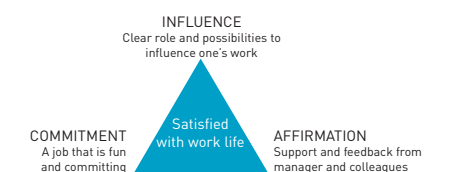employees just want their needs met as soon as possible.

With increasingly complex work which is focused on thought productivity, Pink suggests working with abstract aspects such as autonomy, mastery and purpose. Autonomy means motivating employees by allowing them to engage themselves in the work, i.e. leaving them in to get on with it rather than micro managing their tasks. Mastery is defined as the desire to be the best at something, and to be able to do something well. This can be closely connected to flow – the feeling that you get when you do something really well. Purpose is the context for autonomy and mastery; that is when we feel motivated and feel that what we are doing is meaningful. There is a big difference between what employees want from their managers in terms of motivation

"We are moving forward in understanding what effect soft values have on business. In principle, soft values can be converted into business values."

and what managers think that they want (65 % of managers think that money is the most important motivator, but that view is only shared by 18 % of employees).

INFLUENCE
Clear role and possibilities to influence one's work

Satisfied with work life

COMMITMENT
A job that is fun and committing

AFFIRMATION
Support and feedback from manager and colleagues

WHAT ABOUT ME?

Nowadays, many companies allow their employees to undergo training. It is about giving the workforce opportunity for personal development. Working environments can contribute to lifelong experiences which are both rewarding and inspiring. Many offices have specific classrooms for regular staff training, while others even extend this offer to their clients. In a survey of young Swedes, 90 % said that personal development was the most important aspect of a career. Many companies also work in a more learn-ing focused office environment, not just to get their employees to master their tasks, but also to keep them motivated.

"Interesting assignments where staff can learn new things which also contribute to personal development are important for those looking for work today. We therefore need good leadership so that we can lead those young people who are entering the world of work. Leadership development is important in allowing the skills of the new generation to be utilised in the best possible way. The new generation is accustomed to receiving feedback and attention, which can be a challenge"
Liv Tveter, MD Kinnarps Norway

SOFT VALUES – VITAL FOR MEANINGFUL WORK

Money is not the most important factor when choosing a job. Instead, people are looking for flexibility, values, well-being and opportunities for personal fulfilment. Stress levels have risen in society as people try to combine work and family life. So far, the discussion has been about finding a balance between work and home life. But now we are seeing an increased focus on how to integrate work and home life. Flexible working hours make it easier for employees to organise their lives since they can work as and when they want. The next step is to give parents the opportunity to work in the office and be fully focused on the job while their children are looked after nearby – either through public childcare or in a kindergarten provided by the employer. Flexibility and connectivity mean that people can choose when they want to work so that it is easier to integrate their work and family lives.

"We are moving forward in understanding what effect soft values have on business. In principle, soft values can be converted into business values"
Tim Oldman, CEO, Leesman Index, UK

Social aspects, such as the feeling of community and togetherness are becoming increasingly important. Companies such as Southwest Airlines are trying to create good environments for their employees.

Zappos is also doing something similar; they convey their vision through their staff. The workplace can supplement or replace various aspects of the community (family, the neighbourhood, clubs, etc.). Workplaces which convey a sense of community also create a sense of meaning for employees. An example of this is Zappos, which only employs people who fit the company's culture. In the workplaces of tomorrow, aspects such as purpose and soft values will almost certainly play a bigger role – it is important that employers take into account what really matters to their employees.

CASE STUDY

McBassi & Company is an example which shows that it pays to invest in individually-focused measures to increase learning capacity, knowledge and personal development. Those companies which invest most in their human capital seem to reap the greatest economic rewards. Talented people tend to apply to this type of company as they help them to develop themselves.

QUICK GUIDE

For employees to feel happy in their work, soft values such as influence, affirmation and engagement are more important than the salary itself. The employer's values also play a crucial role when people are looking for jobs.

Different things are important to different people – some highly value flexible working hours, some self-fulfilment and others a sense of community. It is very important that employers take note of exactly what motivates their employees.

Soft values are important for stimulating employees' inherent motivation, which in turn is a crucial factor within the thought economy.

Personal development and learning are very important for employees. It means that they can do their work in a more independent way, something which increases their motivation.

6. FROM SOLITUDE TO MULTITUDE

Society is actually becoming more secluded since, to a large extent, work is the only place where we integrate and cooperate with other people. Broadly speaking, the workplace is changing from a place of tasks to a place of projects. A place where knowledge is the most important resource. Individual work in the workplace is decreasing in favour of more cooperation.

"Without an office, it is difficult to create social cohesion among employees. Without an office, it is difficult for employees to feel connected to the company and its values"

Beata Osiecka, Managing Director at Kinnarps Poland

The new workplace is not about the individual, it is about collaboration! As work is becoming more autonomous, the workplace needs to not just be a place for working, but also a place for social interaction. Our research shows that thoughts and ideas are better developed together with others rather than in solitude. That is why collaboration is the key to success of the thought economy with new requirements for cooperation between different industries and ideas.

ALONE TOGETHER – SOCIAL NEEDS OF THE OFFICE IN THE DIGITAL WORLD
Never before have we been so connected to each other through different social networks and digital media, but as we use these social networks, we end up detached from the real world. According to the market research

on the social aspects of work. Since we are moving towards a knowledge economy or even a thought economy where employees will be more and more autonomous and companies will give employees increased freedom to choose how they want to work. Since more and more work is done in places other than the office, the need for the office to act more as a place of social interaction increases.

Louise Clarsten, CEO at ColourHouse believes that collective sharing is the driving force behind the coming era. She calls certain offices 'WE offices', where togetherness and office play (social, creative role-play) are two important characteristics. *"Young people have grown up with Fatboy brand cushions, mobile technology and digital interaction. Will they have any interest in the traditional office space with classic straight-*

outside companies can be just as important as expertise within a company. As Don Tapscott says: *"Throughout the 20th century, we have held the view that expertise should be retained within the company... But with the internet, expertise can be readily found outside these boundaries, and the whole world can be a resource."*
We would rather find human capital outside the company than inside it. Technology is the driving force behind this collective intelligence, and every time we download a video clip on YouTube, write a comment on LinkedIn or share something – we are programming the collective intelligence. *"If employees change their mind-set and try to think about networks and collaborative work, it can be a way to deal with the new demands of the market."*
Sara Córdoba Rubino, Metaproducts & Booreiland.

"If employees change their mind-set and try to think about networks and collaborative work, it can be a way to deal with the new demands of the market."

firm Euromonitor, the number of single occupancy households globally increased from 153 million in 1996 to 277 million in 2011– an increase of 80 % in 15 years. More people live alone, and 21 % of young people aged 18-24 in the UK are concerned about loneliness. Young people are more concerned than any other age group about loneliness, being single and about their relationships with friends and family. This concern, combined with the increase in the number of single occupancy households, means that for many, the office will be the most important place in terms of socialising. As a result, greater importance will be put

backed chairs? Or would they rather sit on a desk, or slouch into a corner like at kindergarten? They will soon be entering into the office world. Will they have changed?"

COLLECTIVE INTELLIGENCE AND SUCCESSFUL EXCHANGE OF IDEAS
Today we are seeing that organisational structure is being split by new collaborative ways of working. ODesk can give us all the expertise we want simply at the click of a mouse. Web solutions like "Patientslikeme" allow patients to manage their own health information and help to renew the health sector. Nowadays, expertise that is found

"The office must be an intelligent product which supports what the individuals do so that they can perform to the best of their ability – something which benefits the whole group. Collaboration must be supported and strengthened".
Jonas Hurtigh Grabe, Veldhoen + Company Sweden AB.

The approach is changing from tasks to projects, where knowledge will be a key resource in the thought society. In order to succeed, companies must refine and develop the knowledge which is found on the internet or elsewhere into something concrete. The focus is shifting from pure knowledge to the ability to connect concepts and ideas in order to create something new and innovative. Just as with collective intelligence, this involves both openness and sharing by creating more fluid company boundaries, but also acting globally. One of the consequence of this is that individual work has diminished in the past few years and more focus has been put on collaboration. Right now, 50 % of our working hours are spent working together. 50 % is spent working individually and many analysts say that working together will increase up to 70 % by 2030.

The more the hierarchical workplaces with their rigid structures move towards a more autonomous collective, the more crucial networks will be, both in and outside of the company.

THE LEARNING ORGANISATION

A career is described more and more often as a personal development rather than "climbing the career ladder". According to

Share of work time

From individual work to collaborative work
(Source: Veldhoen + Company)
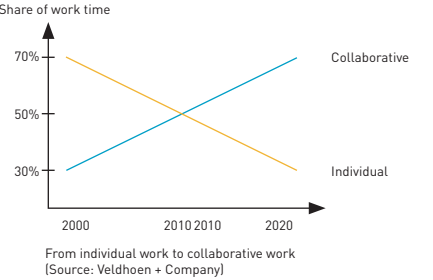
Manpower's survey on work in Sweden, a dream job is defined as something which is exciting and will contribute to personal development. 90 % of respondents in a Swedish survey among young people said that personal development was one of the most important aspects of their career. Therefore, work is something which is more than just a place where you go – it's a place for learning and development. This is crucial for companies which want to recruit young talent. Employees often ask themselves: How can I reach my potential? Companies such as Google and Apple have already created plans for how they will help their employees to better themselves through education. Many companies have problems with recruiting talented people, therefore they need to make sure to develop

the human capital which is already within the organisation. Therefore we are seeing that working environments need to be supportive and inspirational to lifelong learning. Companies are often equipped with classrooms and give their staff personal training and some also provide training for their clients. But this isn't happening – in the future, we need to encourage spontaneous interaction and learning within organisations. In the thought society, innovation and concepts are core values which will create spontaneous interactions. Companies will be successful if they can discuss new ideas and connect them together. A critical factor in success is a corporate culture with a natural transfer of learning and knowledge.

CASE STUDY

Apple's head office in the UK often has workshops and training for employees and clients. They regularly invite lecturers to inspire staff and allow other organisations join in their development.
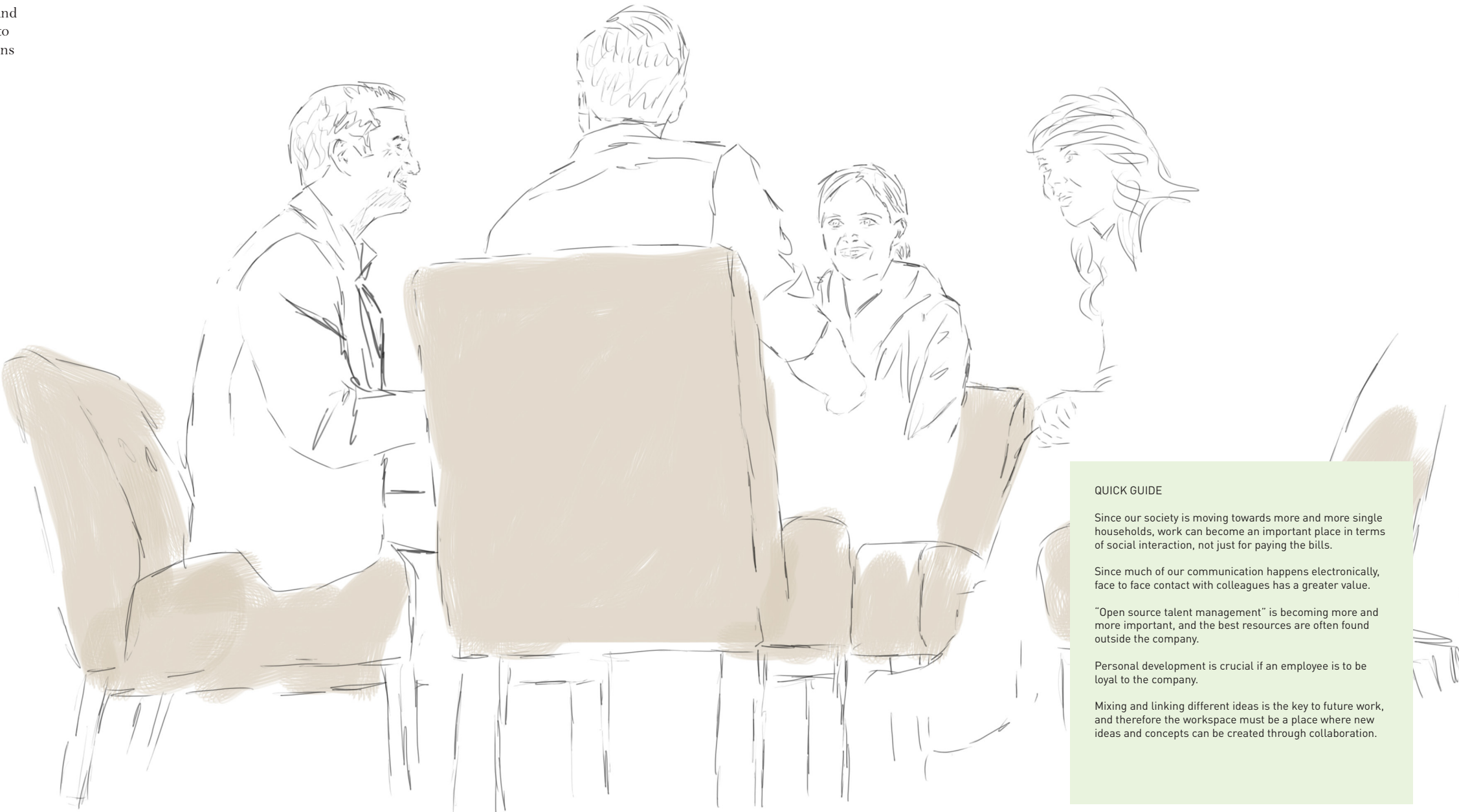
QUICK GUIDE

Since our society is moving towards more and more single households, work can become an important place in terms of social interaction, not just for paying the bills.

Since much of our communication happens electronically, face to face contact with colleagues has a greater value.

"Open source talent management" is becoming more and more important, and the best resources are often found outside the company.

Personal development is crucial if an employee is to be loyal to the company.

Mixing and linking different ideas is the key to future work, and therefore the workspace must be a place where new ideas and concepts can be created through collaboration.

> *"You go to work for two reasons: to have meetings and be distracted. If you want to do something constructive, don't go to the office"*

Martin Cook, Board Director and Head of the Interior and Graphic Design Group at BDP, UK

7. FROM DISTRACTION TO CONCENTRATION

Today, many people choose to work at home or from somewhere other than the workplace in order to avoid distraction. In short, reducing distractions leads to increased motivation. It will be crucial that future working environments are designed so that complete concentration is possible if a desired level of productivity is to be reached. For example, open plan offices are not good for all tasks or for all people.

In recent years, creative people who get on well in open plan offices with a vibrant atmosphere have had the chance to flourish. This has many positive effects, but in our thought society it is also important to create environments which promote concentration and privacy. We see it as environments where we can find an optimal balance between the private and social spheres, between meetings and work, between concentration and dialogue.
"Most of the organisations we work with understand that clients value collaboration, but unfortunately they often forget the advantages of solitude. They have focused so much on the common view of work that they have missed the value of solitude"
Tim Oldman, CEO, Leesman Index, UK.
"When we opened our new showroom in

MOTIVATED WORKERS
Nowadays, nobody gets more than three hours of uninterrupted work done in the office. This change has happened gradually over the past few years, much as a result of open plan offices and complex, technology driven tasks. One of the main reasons is that working environments have changed from separate office rooms to open plan offices which are focused on ideas and group work. Technology is another underlying factor as it leads to distractions. How big the distraction is depends on the work and other external factors, but most of us are affected by the normal disturbances such as emails, text messages, noise, colleagues talking nearby and micro managing supervisors. These aspects lead to work being more fragmented and complicated.

is also further affected by working environments which lack structure and have unclear goals. Greater structure is therefore crucial in giving employees the opportunity to achieve this "flow"

KNOWLEDGE DISSEMINATION OR REASON FOR DISTRACTION
Approximately twenty years ago, there was a big change in working environments as they changed from cubicle offices to open plan. This was said to be an ideal way to transfer ideas and knowledge between staff in the working environment. Whilst it is true that knowledge sharing was a benefit, disturbances also became more common. According to a study by Manpower and Kairos Future, 22 % of employees go to a place where they can be alone when they

> *"Most of the organisations we work with understand that clients value collaboration, but unfortunately they often forget the advantages of solitude. They have focused so much on the common view of work that they have missed the value of solitude"*

London, we noticed an interest in the concept of the 3Cs − Collaboration, Concentration, Contemplation. It was clear that a bench-like working system for employees did not create a workplace suitable for tasks requiring great focus. Space to concentrate is very important. Employees who use mobile technology should have different types of space in the office which suit different types of tasks, such as working in groups, having planned meetings, informal meetings or doing focused thought based work"
Ian Weddell, Commercial Manager, Kinnarps, UK.

NO DISTRACTION LEADS TO MORE

Consequently, few of us have time to sit down and really be productive by thinking of solutions to different problems we face. It is possible that productivity decreases due to the increasing number of distractions, but many employees also experience decreased motivation when they are disturbed whilst working. Employers should strive for what Csikszentmihalyi calls "flow". This is when someone is totally absorbed in their task and is completely devoted to it. It is difficult for employees who are constantly disturbed to achieve this flow, and consequently it is difficult to feel the motivation that comes with it. Employees' motivation

want to be productive. If you sit in an open plan office and have nowhere to go, it is quite likely that you will use your headphones to shield yourself and be more productive. You create your own "noise space" – 28 % of those who sat in an open plan office chose to listen to music when they wanted to be productive. Open plan offices are not suitable for all type of tasks, especially not for the more common and important tasks which require a bit more thought.

However, it is not just the open plan offices which are problematic, but also the number of meetings which employees have to go to each day. A new study by Manpower and Kairos future showed that most employees felt that two meetings a week is about right. Various aspects of knowledge transfer can interrupt and interfere with employees' thought processes. Studies over the last decade have shown that when we multitask, we lose concentration, and this way of working hinders us from achieving the desired "flow". We need to create environments where employees can fully focus on the task at hand so that they can achieve this "flow" and their full potential.

"People want to either concentrate on a task or meet others to communicate. Acoustics will remain an important issue in distinguishing these two ways of working. It is also important to create a "do not disturb" culture so that everybody's need for privacy and concentration can be better respected"
Beata Osiecka, Managing Director at Kinnarps Poland.
But of course we do need "meetings". Is it a meeting when a few people get together in a creative process? Is it a meeting when a number of people get together for coffee? Is it a meeting when employees are gathered together for a formal briefing? Meetings inspire us and make us feel happy with our work.
"It is through having meetings that we create values for our organisations."
Henrik Axell, Concept Developer of Kinnarps' Activity Based Working Environment, Kinnarps Sweden.

THE NEW INTROVERTS

Vi har gått från arbetsplatser med fokus på We have gone from workplaces focused on the individual worker to more collaborative workplaces. During this process, we have forgotten that we think best when we concentrate, and more importantly, we have forgotten that everyone is different. Some employees are introverts. According to Susan Cain, these employees need seclusion and quiet environments in order to concentrate. These people do not form their best ideas in group environments (which often suit the most vocal, the socially confident and the quick thinkers), instead they perform better in their own quiet environments.

There are also differences between people in different age groups. The older generation has learned to concentrate on one thing at a time, therefore they can become frustrated by all the interruptions. The younger generation is more used to multitasking (or at least having more than one thing on the go at once).
If we really want an innovative culture which values both new ideas and hard thinking, we need to give employees the opportunity to think in peace. Thinking is becoming the new competitive factor, mainly because we have easy access to facts and data everywhere we go. Knowledge is no longer the most important factor, rather understanding it and combining seemingly different ideas with new concepts and solutions which really make a difference. Therefore, we need to design workplaces so that they support the tasks which require concentration; open plan offices do not work for everything and everyone.

CASE STUDY

Pixar is a company which creates environments which work for all sorts of people. They try to create environments which promote thought productivity as much as possible. Their offices have recently been redesigned with a focus on allowing the imagination to flow, regardless of whether their employees are introverts or extroverts.

QUICK GUIDE

It is crucial that we create environments where employees can properly concentrate so that they get a sense of "flow".

Distractions reduce employees' motivation.

Open plan offices are not suitable for all types of tasks.

The needs of both introverts and extroverts must be met.

8. FROM WORKSTATION TO FREE-WHEELING

New technology, new values and new requirements in terms of creativity and efficiency have resulted in employees leaving their fixed workstations. We work in so many different ways that we spend little time at our desks. This results in specific desks for specific tasks, smaller and more efficient office space, as well as increased productivity and creativity.

"Workplaces of the future will be more focused on the individual and based on the activities which we actually do"

Henrik Axell, Concept Developer of Kinnarps'
Activity Based Working Environment, Kinnarps Sweden

"I do not see the changes to future activity-driven working environments as an interior design project, but rather a major project for change. The changes consist of three parts, where each part must be understood – the physical environment, the digital environment and the organisation/leadership. The reason for going through these changes is to give employees greater freedom, but also to create flexible, functional and stimulating working environments."
Henrik Axell, Concept Developer of Kinnarps' Activity Based Working Environment, Kinnarps Sweden.

The traditional workplace, with an individual desk, chair and cabinet for each employee simply isn't sufficient for today's office environment. Consequently, we are seeing significantly large changes happening in office work. New technology, new values

ves. The concept of a personal place or "my" desk is disappearing, and is being replaced by a place where individuals and teams can work in different places at any time, according to the task at hand"
Ian Weddell Commercial Manager, Kinnarps, UK.

MANY DIFFERENT ACTIVITIES ON THE SAME DAY

Being given a task and doing the same things day after day is a thing of the past. Now, many different things happen each day. We read emails and text messages, discuss ideas, plan conferences, read and write reports, draw drawings, take part in workshops, make calls, go to meetings, talk to colleagues, look for information and much more.

What are people doing if they aren't sitting at their desks? They're working! However, nowadays there are so many different aspects and nuances of work that not all can happen in the same place. The different activities must instead happen in the places which are most suitable. Sometimes we sit at our desks, but often we work from a café or at home, go to meetings or try to find a secluded corner where we can think in peace.

"How effectively is a building used? How often is a desk/meeting room occupied? Property is a major business cost that is potentially being under-utilised using traditional design solutions. More flexible interior design is in demand as property rent increases"
Ian Weddell, Commercial Manager, Kinnarps UK.

"The highest performing spaces that we've seen are those where the client has not necessarily invested more money in the design or the construction of the workplace, but has invested more time and compassion and conversation in understanding exactly what their employees need to contribute at the level they can contribute at."

and new requirements for creativity an efficiency mean that employees are leaving their traditional desk positions. Instead of sitting in a specific seat, they conduct their activities wherever is most suitable. The desk is good for some things, but certainly not for everything. Staff and companies are realising that they can work much more efficiently if they are free from desks and wires.

"The trend is for more workplaces where employees have chosen their own working environment according to the activity, and for workplaces which can offer them different environments where they can complete their objecti-

The traditional workplace with fixed seats is often poorly suited for all these activities. It is better that a particular activity takes place somewhere which is specifically designed for that activity. For example, it is possibly better to read a book in a library, or hold a workshop in an area with space for lots of people. And it is probably appropriate that formal decisions are made in a boardroom.

NO-ONE LEFT
An office is never more than 50 % full. Various studies (e.g. Flexibility.co.uk and Francis Duffy) show that the normal capacity is about 40 %, often lower.

BETTER PRODUCTIVITY
When there is so much space not being used, there is a great opportunity to increase productivity. Instead of a desk, a chair and a cabinet for each employee which only gets used a third of the time, companies can reorganise their offices. By changing the environment and creating different spaces for different activities, all employees can choose where they want to do their work.

This improves productivity and consequently profits. With the help of activity based work, the requirement for floor space can be reduced. Usually, we need 5-10 m2 per employee. It is entirely possible to manage with less than 5 m2 per employee. This is possible by not forcing everyone to have fixed places, rather allowing them to move freely around the office and choose the place that best fits the task they are doing.
"The highest performing spaces that we've seen are those where the client has not necessarily invested more money in the design or the construction of the workplace, but has invested more time and compassion and conversation in understanding exactly what their employees need to contribute at the level they can contribute at. That for me is the difference in the future, that the industry will be bolder by telling people to slow down and think to provide better considered space that is more tailored to the individual"
Tim Oldman, CEO, Leesman Index, UK

Personal productivity will also increase in a mobile and flexible working environment. According to a study by Citrix, employees benefit from a quiet workplace, which they consider gives them greater flexibility (65 %), increased personal productivity (62 %), shorter commuting times (61 %) and a better work-life balance (55 %). They also have more time for their clients (48 %).

NEW KNOWLEDGE AND CREATIVITY
"The term 'office' needs to be completely redefined. It used to be that a company hierarchy was created which was simply transferred to the building – the interior design therefore reflected the organisation. The work we do today is considerably less isolated and individual. Nowadays, more emphasis is put on cooperation, we write and create things together, and it drives forward a whole new approach to work in the future. Teams must work together internally as well as with different companies, in physical meetings as well as virtual ones. Therefore, organisations as a phenomenon must find new ways of relating to the building. My vision of the workplaces of the future is known as "activity based clusters". This is based on the premise that when you collaborate with others in the cluster or temporary connection, you are together creating the space you need, regardless of the boundaries of the office or department."
Philip Ross CEO of Cordless Group, UK.

In the thought society, creative thinking and sharing knowledge is the key in business activities. Without new ideas and thoughts, companies are quickly left behind. The old ways of working have not shown to have the best solutions for the thought economy. New ideas are born out of collaboration. In order for collaboration to work, we need

spaces which promote people working together. These places and spaces can be anything from a short meeting by the coffee machine to large rooms designed for creative activities.

The short, unplanned meetings often spontaneously give rise to new ideas. When we meet someone who we weren't expecting to meet, our minds get a kick out of it. Stimulation in different forms such as coffee, can also contribute to new thinking. But in general, new ideas do not come so easily. New thoughts require structure and rhythm. We can achieve this by creating room for creativity, collaboration and imagination. It is partly about the space, where space is a pre-requisite, and colour and decoration are additional. The way the room is equipped is also important: furniture, drawing boards, TVs, balls and games as well as other things can get the creative juices flowing.
"At a management level, we should always be talking about attractive design, creativity, productivity, office space, interiors and environments. These questions must come up at a strategic level. We must continually discuss this. When it is time to move, it would otherwise just be a matter of changing address"
Jonas Falk, architect at Strategisk Arkitektur, Sweden.

NEW SPACE DEMANDS NEW LEADERSHIP
In a quiet office, we know exactly where things are. An old-fashioned manger wants to see the employees: if they are sitting at their desks, they are working, if not, they are probably skiving. However, this view of leadership is also changing. Most people carry out their tasks in several different places. According to Manpower's WorkLife study, half of Sweden's employees work from home or other places outside of the office at least a few times a month, on average 1.5 days a month. Almost all work at a table or from a private office. According to the same study, 4 % work in bed and 16 % from other places at home or in the office. Even in the office, we work from different places. This means that managers have less control over their employees, something which requires a new kind of leadership where managers actively seek out their employees and talk to them. Technology is a necessity for making calls, video chatting or just getting hold of each other easily. However, above all, managers must learn new ways to lead, see and empower their employees
"Change is happening all around us, but right now we are seeing a rapid change in what an office is. Those companies which don't want to be left behind must be serious in terms of office

planning, and carefully consider the consequences of the decisions they make today for the future"
Ian Weddell, Commercial Manager, Kinnarps UK.

IN PRACTICE
There are a number of things which need to change if we are moving away from a working environment with fixed places to a free environment. First and foremost, we need to define and understand the different activities which organisations need – what do you need to be able to do during a day at work? In addition, we need to understand how often the different activities happen – once a day, once a month or just once a year? From there, you will have a creative process where new space is developed to accommodate different types of activities and tasks.

However, it is not just about furniture and layout. The most important thing is to engage employees so that they are included in the whole process of change, from beginning to end. To start with, opposition against change can be great, but it is possible to turn even sceptics into ambassadors.
challenge to take the first step towards an activity based environment. In the beginning, there was considerable opposition. After the surveys, which showed very good results, no-one wanted to go back to the old way of working. It is a journey, and it's incredibly important to have everyone on board. Engaging everyone in

the process. Even sceptics can become ambassadors for change!"
Heléne Lidström, Corporate Communication Manager, Microsoft.

"I think that the workplaces of the future will be location independent and activity orientated. This means that the workplace is created in accordance with the actual occupancy and the personal workplace is exchanged for a number of flexible, functional and stimulating working environments, which promote various work tasks and various individuals. We currently have a number of queries on this and I am incredibly curious about the activity based concept, although not all organisations are ready to take the plunge yet."
Henrik Axell, Concept Developer of Kinnarps' Activity Based Working Environment, Kinnarps Sweden.
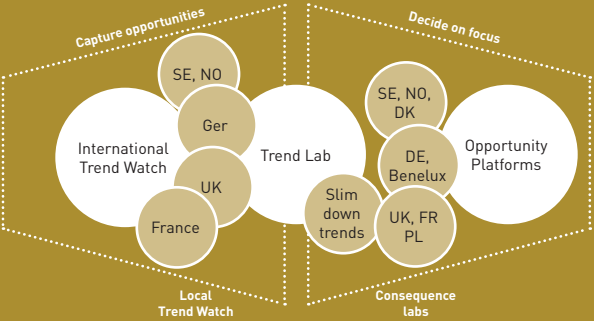

CASE STUDY
Microsoft has rebuilt a number of offices, most notably is probably their office in Amsterdam. In 2010 the new office was opened which was designed specifically for activity based work. Nobody has their own room, own desk, or chair- not even the top managers. Although there was a certain level of resistance and opposition before the change began, a survey shows that after six months, all employees are happy with the new office. Nobody wants to go back to the old way of working. According to Microsoft, they have experienced a 30 % reduction in property costs, increased productivity, enhanced market reputation, ability to attract and retain talented employees, increased mobility for employees and benefits for the environment. Microsoft is calling it *"The New Way of Working"*.

QUICK GUIDE

We are leaving the individual desks and the individual chairs behind us – there are no fixed places in the new offices.

The new office is activity based, with different areas for different activities.

The floor area can be reduced while the number of workers can increase.

Productivity and creativity benefit from a flexible approach to work.

Management must develop and embrace activity based work.

The transition from fixed to free workplaces is a process of change which must be given time!

THE WORK BEHIND KINNARPS' TREND REPORT

Kinnarps' Trend Report is based on a wide trend and future analysis by a number of people from Kinnarps' different markets, as well as trend analyses from external partners.

Firstly, we concentrated on creating a broad and useful Trend Map which includes the most important changes in the current situation which we can identify and which have or will have a major impact on how we work, meet and learn things in the coming years. Work to identify trends continued in 2012 in partnership with Kairos Future (international consultancy and research company). Together, we succeeded in finding more than 200 phenomena and trends which will increasingly shape and change our working environment.

Capture opportunities

SE, NO

Ger

International Trend Watch

Trend Lab

UK

France

Local Trend Watch

Decide on focus

SE, NO, DK

DE, Benelux

Slim down trends

UK, FR PL

Opportunity Platforms

Consequence labs

During the process, we also interviewed a number of prominent experts and opinion leaders to differentiate the groundwork and to test the Trend Map which we were about to develop (see reference list). During the process, we ranked the material and compiled a Trend Map of the 22 trends and phenomena which we considered particularly important. We have gradually refined this map and have found eight different changes which we think will affect the workplace of the future. It is these eight changes which we are presenting in Kinnarps Trend Report.

THE WORK PLACE **OF** 2020

"In 2020 we will live in a society where technology is used everywhere. We will be able to work where and when we want. I also believe that we will place greater importance on personalisation in the office, as togetherness becomes more important in a world fixated with technology. Furthermore, I believe that products and services within office design should be flexible – furniture must be modular and should be used for many different purposes."
Liv Tveter, MD, Kinnarps Norway

"In the future we are going to be better at balancing office design with a clarity about the company's brand and what it stands for. Working conditions will also be optimized in the same obvious way through new solutions for ergonomics, health and technology. Smart offices, where DESIGN, HEALTH and TECHNOLOGY are equally valued, will ensure that both staff and visitors feel comfortable, something which will ultimately benefit the company's management."
Louise Clarsten, CEO ColourHouse AB

"The workplace in 2020 will be very heterogeneous and it will offer people choice based on who they are and who they want to work with and what they want to do. From a user's perspective it will be more and more transparent when it comes to technology infrastructure, and there will be far less clutter. The workplace will be a range of settings, complemented by other environments to work in, which will give people a better sense of ownership because they will have the freedom to choose and adapt the space to their needs. The workplace will be more nimble, more flexible, it has pulse and velocity."
Philip Ross, CEO of Cordless Group, UK

"The office is no longer just about where I sit, where my telephone is or where I keep my files or computer. The office will become a meeting place for collaboration and information, a place for focused work and for important social meetings with colleagues."
Ian Weddell, Commercial Manager, Kinnarps UK

"The variation and diversity is dominant in tomorrow's office. An office will not always look like an office. It is a climate and weather protected area for meetings. It can look like anything!"
Christina Bodin Danielsson, PhD, Architect at Brunnberg & Forshed Arkitektkontor AB and researcher at the Stress Research Institute, Stockholm University

"The future office 2020 is characterised by movement. The experience of the office is that we move around much more and in new patterns. Much more dynamic furnishing and organisation encourages new meetings and behaviours."
Andreas Lundberg, Business Developer, Property Development, Commercial Properties, Skanska Öresund AB, Sweden

"In the new office things happen that would never happen in the old office – new encounters, new collaborations and new possibilities emerge. There is a more immediate access to leaders in the new office – you get a day-to-day relationship with managers."
Heléne Lidström, Corporate Communication Manager, Microsoft Sweden

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Meyers-Levy, Joan and Rui (Juliet) Zhu (2007): The Influence of Ceiling Height: The Effect of Priming on the Type of Processing That People Use, University of Minnesota

WITH THANKS TO

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About Kinnarps

Kinnarps is a Swedish interior design company that offers innovative and inspiring total solutions for working environments. Our main office is located in Kinnarp, in the west part of Sweden, where the company was founded in 1942 by Jarl and Evy Andersson. We are still a family owned company that today is the European leader in our industry and are represented in more than 40 countries. Our starting point is sustainability, well-being and profitability for those using the environments we design. Today we offer solutions for different types of workspaces, offices, schools/education and hospitals/health care. We are in control of the entire process, from concept and production to distribution and installation. All to achieve maximum efficiency and top quality with the lowest possible environmental impact. Our more than 70-year tradition has given us solid expertise and experience. We also work continually to analyse what trends will have an impact on the working environments of tomorrow. With our product brands Kinnarps, Drabert, MartinStoll, Materia, Skandiform and NC Nordic Care we offer durable solutions with different expressions. We also have a wide supplementary range of products from a number of renowned partners. Kinnarps has about 2 400 employees and its turnover in 2013/2014 totalled SEK 3.7 billion. The Group conducts progressive and in-depth work to improve the environment and complies with the leading eco-labelling demands. Kinnarps is also certified in accordance with FSC®, ISO 9001 and ISO 14001. Read more at **www.kinnarps.com**

NOTES

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