



MANAGING UNCERTAINTY IS THE KEY TO PLANNING FOR THE FUTURE OF WORK



Modelling for a variety of futures is an important step in understanding the implications of global and regional workplace trends on areas of business such as company culture, real estate portfolios, workplace models and the role of the office.

The way we work is changing — rapidly. Companies and organizations have many questions about the future of the workplace.

To manage that uncertainty, we have been using scenario planning to help us understand and frame what possible futures could look like, not only to inform our own workplace strategy, but for our clients as well.

Scenario planning is a methodology used to construct hypothetical futures based on emerging trends and critical uncertainties. Using scenario planning, we wanted to explore and

understand how different driving forces would impact work practices — and therefore workplaces — over the next decade and use the output to help clients drive their decision-making.

Spanning two virtual workshops, a multidisciplinary team of AECOM colleagues from five continents took part in a scenario planning exercise that sought to answer the question:

How might organizations globally enable their people to work effectively as individuals and teams in 2030, and what will the impact be on places of work?

Our findings are detailed in this booklet. You'll read about the approach we took, the critical uncertainties we chose, the four scenarios and their implications across four areas: *real estate, people, technology and innovation, and business operations.*

Together, they form a strategic framework which we are using to help our clients navigate uncertainty, mitigate risks and explore future eventualities. ➔

OUR APPROACH

Our approach

How might organizations globally enable their people to work effectively as individuals and teams in 2030, and what will the impact be on places of work?

In order to answer this question, we took a four-step approach.

- 1/ We identified the driving forces that could impact the central question.
- 2/ We prioritized the driving forces that delivered the greatest level of critical uncertainty.
- 3/ We created four possible scenarios.
- 4/ We developed the context of each scenario to assess the implications for real estate, as well as the impact on people, technology and business operations.

Critical uncertainties are the foundations of scenario planning

Critical uncertainties are elements which are key to the problem you're trying to solve but are highly uncertain and unpredictable. Their impact is unknown, and they are expressed as a 'tension' or an either/or statement. The scenarios are developed by layering two critical uncertainties together to create a two-by-two scenario matrix.

Our team decided that the following two critical uncertainties would have the greatest impact on our central question.

Knowledge and skills equity/inequity

Knowledge and skills equity is not just about equal opportunities. It's about people having what they need depending on their circumstances to leverage the equal opportunities they are given.

In the context of work and the workplace, we are concerned with an individual's personal circumstances and whether they can always access, acquire and upgrade their knowledge and skills to do equally well in their jobs and career.

Hyper-localization Globalization

In a globalized world, people are not bound by country lines that dictate where they live and work. Inclusion and diversity are fundamental values for many, and economies and cultures intertwine, leading to an increased sense of global citizenship.

In a hyper-local world, people live in smaller communities that largely self-sufficient and they prioritize those in their immediate circles. They decrease their dependence on external support, and resist influence from other countries and communities. There's a growing distrust of large companies. →

Points to remember when reading the scenarios and their implications:

- / Scenario planning does not predict the future, nor present solutions. It does however, give us a platform to imagine and think about the directions we could take
- / The scenarios have global relevance and can be applied to countries, regions or cities
- / Communities refer to groups of people bonded in some way by a common focus or purpose. For example, a community could comprise people living in the same town, or equally a community of hackers spread across the globe.



THE FOUR SCENARIOS



SCENARIO 1 STRONG MICRO COMMUNITIES

Welcome to a world full of micro communities that are self-sufficient and autonomous on a good day, vulnerable with limited opportunities on a bad one.

People live in small, tight-knit ecosystems. They work close to home and no one commutes. Co-living and co-working arrangements are the norm. The sharing economy dominates over traditional ideas of ownership. People band together to take care of the environment around them. Each community has hyper-specialized skills and knowledge such as technology, agriculture and pharma hubs.



SCENARIO 2 GLOBAL CITIZENS

People's default view is that they are of the world. Their relationships are far-reaching, and their loyalties don't lie within geographical boundaries.

Corporations connect the global population and are the main proponents of upskilling the labor force and providing universal education to ensure that AI and humanity complement each other.

At the same time, governments work together to ensure digital and virtual infrastructure is cohesive across the world, and the global population has the option to live and work from anywhere. It's borderless mobility. It's multi-location teams.

Knowledge + skills equity

Hyperlocalization

Globalization



SCENARIO 3 RISE OF THE SILOS

People live in localized siloes and are territorial. The disparity among communities is stark, and the boundaries between them are impermeable. There is a distinct lack of social mobility, people are unable to improve their standards of living because of a lack of access to skills and knowledge. This leads to high levels of unemployment concentrated within specific communities.

Wealth is extremely fragmented, causing exploitation and disparity. There are no global efforts to address environmental concerns and some communities bear the consequences of climate change more than others.



SCENARIO 4 THE HAVES AND THE HAVE-NOTS

Corporate wealth outstrips that of national economies. Types of jobs and industries are specific to each country and concentrated in specific cities.

Corporations continue to put their top decision makers and core competencies in a few countries, concentrating knowledge, skills and wealth. AI is developed and implemented variably; infrastructure and access to upskilling is limited in some countries.

Disparity among countries become more severe.

Knowledge + skills inequity

SCENARIOS AND IMPLICATIONS



SCENARIO 1 STRONG MICRO COMMUNITIES

A look at society, politics, technology and attitudes to the environment in this future scenario.

Welcome to a world full of micro communities that are self-sufficient and autonomous on a good day, vulnerable with limited opportunities on a bad one.

The population is homogenous, anchored in similar values and beliefs. There's a strong sense of belonging, but in this collectivist culture it's also difficult to be different; being an outlier is discouraged.

People are highly skilled in their particular specialisms and do well while they remain within the micro

community. People are agile when it comes to what they work on, knowing that they can slot into different projects within their industry when needed. However, moving away or operating outside of the micro community presents challenges.

Technology is focused mostly on making life in the community better and improving infrastructure, such as vertical farms and driverless public transport. Technology does not play as big a part in people's social lives because communities are dense and physically close to each other.

The planet feels a lot healthier. Close-knit communities share responsibility for the health of their environment and each other. Travel is

mostly local and done through shared or public transportation or active modes such as walking or cycling. The need to travel further afield is limited, thus reducing long drives, commutes and flights.

Communities are self-sufficient and can achieve sustainable outcomes more easily such as water management and local energy networks.

Political power is decentralized and localized. Local authorities have more power, and their priorities (funding, public initiatives, etc.) are focused on their immediate communities. However, this fragmentation of power leads to the slowing down of systems, opposing priorities and less cooperation among authorities. ➔

THE IMPLICATIONS

What are the implications for the way we work and the workplace if people are able to leverage the opportunities afforded them in a hyper-localized world?

REAL ESTATE

Buildings

- / Buildings are designed to support a mix of business, residential, commercial and social uses.
- / They are connected and designed to be part of an open-campus environment.
- / Spaces are multi-functional, designed to support and enable the daily activities of a community.
- / Communal areas feature prominently and extensively. The boundaries between private and public spaces are permeable.

Market landscape

- / Longer leases become the norm as companies commit to and invest in their spaces and the communities that use them

Standards

- / Companies invest in green buildings because protecting the environment is considered an important priority within close-knit communities.



PEOPLE

Employee engagement

- / People seek purpose and meaningful work. Organizations and workplaces have strong social value agendas.
- / There are no trade unions. Instead, individuals rely on professional networks for support and recommendations.

Talent acquisition and retainment

- / To keep communities' economies buoyant, healthy and competitive, companies invest heavily in training and upskilling, fully aware that people are their number one resource and priority.

Workplace culture

- / People's professional and private lives are interwoven, so people value clear and structured schedules in order to maintain a healthy work / life continuum.

TECHNOLOGY

AI and data

- / As communities are highly specialized and focused on their respective expertise, AI advances quickly and raises the baseline for productivity.

Connection

- / Technology is widely used for connecting to the wider world and other communities, particularly AR / VR in lieu of physical contact.

Innovation

- / Innovation is very specific and specialized.

BUSINESS

Operating model

- / The gig economy thrives due to the availability of highly-skilled individuals who are experts in their field. Companies bring teams of experts in to deliver on particular projects.

Market landscape

- / As companies are highly-specialized, they find it hard to pivot. There is fierce competition to be the best.

Governance

- / Trade is highly regulated. Governments are vigilant about trade relations, focusing on laws that allow frictionless trading amongst communities. Companies are watched closely. →





SCENARIO 2 GLOBAL CITIZENS

A look at society, politics, technology and attitudes to the environment in this future scenario.

There are no barriers to movement in this future. Any negative mindset and attitudes about foreigners and immigrants are completely transformed...in fact, those words are rarely used.

People can work for anyone from anywhere; and therefore, choose to work for organizations whose values resonate and where they will find like-minded colleagues. Social networks are formed mainly from work. People have a lot of social and career mobility, powered by continuous learning, untethered to specific cities or countries.

People are empowered, wealth is more evenly distributed, and there is a big emphasis on equity. Education syllabus becomes more universal and the quality of education becomes more equitable across the globe.



WEALTH IS NO LONGER THE SINGLE MOST IMPORTANT MEASURE OF AN ORGANIZATION OR COUNTRY'S SUCCESS.

Technology and its infrastructure is hyper connected, ubiquitous and standardized. Rapid advances in development and deployment have been achieved due to both investment from global organizations and world governments in order to keep abreast of competition and remain part of a global network.

Data is the new currency. Protection and privacy of data becomes even more crucial and regulations and their enforcement are consistent globally.

Wealth is no longer the single most important measure of an organization or country's success.

Corporations are defined differently as they are responsibility reach far beyond generating financial returns for their stakeholders. Corporations are expected to be good and to do good, to be responsible for the environment, and to educate the populace.

The approach to climate change is global and united. Responsibility is spread equally between corporations and governments, and filters down

to every person. People expect corporations to operate within low or net zero carbon ideals. Global citizens are connected, switched on. This heightened awareness means that people demand solutions to climate change.

Clean energy and alternative power sources are the norm, funded extensively by corporations and governments for mass adoption. Technology is focused on making the world greener, more sustainable in areas such as agriculture, construction and transportation.

Governments have become more unified to facilitate global cooperation and coordination. World organizations like the United Nations and World Trade Organization are much stronger, reducing barriers to trade and freedom of movement. Corporations play a bigger role in central governments, influencing areas such as education, taxation laws, and foreign relations. As such, there are risks from corruption, and monopolies and cartels. →

THE IMPLICATIONS

What are the implications for the way we work and the workplace if corporations have global reach and influence, connecting the global population and driving universal equity in knowledge and skills?

REAL ESTATE

Buildings

- / Mixed-use developments that include co-working, co-living spaces, retail and leisure are popular. Corporations don't own real estate.
- / Many people work from home. All newly-built apartments and houses have dedicated office space.

Market landscape:

- / Space is a service. In urban areas, ground floor premises function as plug and play centers where people can co-work for hours or even days.

Standards

- / There are global benchmarks and standards for safety, design, carbon emissions, and sustainability — there are no more poor cousins. Buildings are smart and green.

PEOPLE

Employee engagement

- / People's personal and work connections are intertwined. People look to their networks and connections at work to also fulfil personal / social needs. Workplaces will facilitate and provide platforms for people to build relationships outside of work-related matters (e.g. yoga, fitness, interest groups, etc.). As a result, employees will feel very connected and loyal to their organizations.

Talent acquisition and retainment

- / Because people can work for anyone from anywhere, the motivation for choosing a job or a company to work for centers around a holistic set of benefits, not just pay. There is a different psychological contract between employee and organization. The nine-to-five day makes no sense anymore, as people interact across time zones. Global working has a new rhythm, the cadence of which is set by the individuals or teams.
- / Businesses leverage on their global nature to be more flexible, mobile and adaptable. They have access to a global talent pool who are able work asynchronously to deliver throughout a 24/7 cycle.

Culture and values

- / Organizations invest heavily in people's training and education, particularly around digital skills. This helps to build strong corporate cultures that engender a deep sense of belonging.
- / Higher connectivity and social equity mean people have increased knowledge and awareness about the planet and what needs to be done on an individual, country and company level.
- / As borders are fluid, people's immediate work circles are more global. Aging populations welcome younger demographics seeking new opportunities from other countries.

TECHNOLOGY

AI and data

- / Collective and personal data will be collected and used safely to connect people.
- / Data is the new currency. Protection and privacy of data becomes even more crucial, and global regulations are consistent and enforced.

Connection

- / Virtual and physical spaces are integrated and act as one congruent environment. As such, tech is an extension of the office portfolio and organizations are constantly upgrading the workplace (tools, apps, etc.).

- / Technology, its infrastructure and platforms are hyper connected, ubiquitous and standardized globally to intuitively connect people across the globe at work and in life.

Innovation

- / Rapid advances in technology development and deployment have been achieved. This is due to both investment from global organizations and world keen to remain part of a global network and stay competitive for talent.
- / Technology is focused on making the world greener, more sustainable in areas such as agriculture, construction, transportation and the running of data centers.

BUSINESS

Operating model

- / Corporations are defined differently as their responsibilities reach far beyond generating financial returns for their stakeholders.
- / Corporations are expected to be good and to do good, to be responsible for the environment, and to educate the populace.
- / People expect corporations to operate within low or net zero carbon ideals.

Market landscape

- / Companies that have strong environmental credentials and operate at low or net zero carbon levels will dominate the marketplace.
- / The number of SMEs begins to decline as start-ups and entrepreneurs eventually fold into global organizations to leverage on their scale to become part of the wider world, instead of focusing on organic growth.

Governance

- / Countries and corporations have complex metrics and KPIs for measuring success beyond financial performance. The happiness index is seen as a credible indicator of true success.
- / Organizations' greater level of influence on the world stage is reflected in higher corporation tax. ➔



SCENARIO 3 RISE OF THE SILOS

A look at society, politics, technology and attitudes to the environment in this future scenario.

Communities are homogenous with strong, common belief systems with little risk of dilution. Societies lack diversity. Exposure to other cultures is limited leading to a low tolerance of cultural and racial differences.

Communities are insular and intra-tribe movement is difficult resulting in a lack of socio-economic mobility. There is very limited upward mobility, and people often remain as they are for generations — leading to underlying feelings of unrest and discontent.

The digital divide is more severe than it has been. It's a vicious cycle — the wealthy and technologically advanced communities keep advancing while the poor and technologically inferior ones fall behind. It's not uncommon



COMMUNITIES ARE HOMOGENOUS WITH STRONG, COMMON BELIEF SYSTEMS WITH LITTLE RISK OF DILUTION.

for wealthier communities to pass down second-hand tech for reuse.

Wealthy communities advance their AI and automation technologies and capabilities, further eliminating the need for labor resources from poorer communities.

Infrastructure, platforms and connectivity are disjointed among communities and countries as there is little imperative for standardization.

Wealth is extremely fragmented. It is concentrated in specific communities causing exploitation and disparity. Social care and health care standards vary drastically, further cementing a community's status and halting any upward mobility.

People want to migrate to other countries or to cities for a better life, but protectionist governments and harsh border laws make this difficult, increasing the levels of illegal movement of people.

Less wealthy countries bear the consequences of climate change and are more vulnerable to extreme weather events. Some countries will have to deal with elevated levels of pollution as manufacturing concentrates in poorer countries with no access to clean energy and alternative fuel sources.

There is no unified view of climate change or global efforts to address environmental concerns. Everyone is focused on their immediate environment and challenges.

Governments are incredibly fragmented. Congress and parliaments don't have an obvious majority but are instead made up of multiple factions. Extremism is common and riots and revolutions are on everyone's minds in the poorer communities.

Trade between countries is closely monitored, and mostly transactional rather than based on any real partnership and cooperation. ➔

THE IMPLICATIONS

What are the implications for the way we work and the workplace if social inequity is rife and wealth, digital capabilities, skills, expertise are concentrated in certain communities around the world, often at the expense of others?

REAL ESTATE

Buildings

- / Corporations no longer believe in the value of having global headquarters. Instead, real estate is dispersed through smaller, regional satellite offices. The offices are in multi-tenanted buildings that are well-serviced and where workers enjoy an excellent range of amenities.
- / Cellular offices make a come-back and are used as rewards to reinforce the notion of status and hierarchy.

Market landscape

- / Building quality is extremely varied depending on the location and organization as there are no global guidelines or standards. There is a disparate approach to facilities depending on location.

Standards

- / Building standards and environmental certifications such as WELL and LEED will only be used by wealthier countries and organizations. In fact, in poorer areas corporations overrule local planning rules to build on greenfield sites.



CELLULAR OFFICES MAKE A COME-BACK AND ARE USED AS REWARDS TO REINFORCE THE NOTION OF STATUS AND HIERARCHY.

PEOPLE

Employee engagement

- / Career paths stagnant. People tend to stay in one job and companies don't bother with upskilling.

Talent acquisition and retainment

- / There are hiring biases and overwhelming amounts of groupthink in organizations.
- / People are hired predominantly through word of mouth or personal reference.

Culture and values

- / Strong common belief systems with little risk of dilution. Companies lack diversity. Exposure to other cultures is limited leading to a low tolerance of cultural and racial differences.

TECHNOLOGY AND INNOVATION

AI and data

- / Wealthy communities advance their AI and automation technologies and capabilities, further eliminating the need for labor resources from poorer communities.
- / Wealthier insular communities will use access to data to assert dominance and control poorer ones.

Connection

- / Infrastructure, platforms and connectivity are disjointed among communities and countries as there is little imperative for standardization.

Innovation

- / Technology is restricted, secured and open source is rare. Technology giants and global companies have their own servers, and do not share.
- / Technology is not standardized at a global level, so communities innovate at different speeds, increasing disparity. It becomes a vicious cycle.
- / A lack of global cooperation is a barrier to innovation. There is less risk taking. Innovation is limited to those who can afford to do it.

BUSINESS

Operating model

- / Companies tend to specialize in narrow scopes of work. Businesses become less resilient and more susceptible to economic downturns and shocks.
- / Organizations have a huge impact on which communities are wealthy and do well, as they control local wages and growth.

Market landscape

- / Wealth is extremely fragmented. It is concentrated in specific communities causing exploitation and disparity. Social and health care standards vary drastically, further cementing a community's status and halting any upward mobility.
- / Less wealthy countries bear the consequences of climate change and are more vulnerable to extreme weather events.

Governance

- / Trade between countries is closely monitored, and mostly transactional rather than based on any real partnership and cooperation.
- / There is no unified view of climate change or global efforts to address environmental concerns. Some countries will have to deal with elevated levels of pollution as manufacturing concentrates in poorer countries with no access to clean energy and alternative fuel sources. ➔





SCENARIO 4 THE HAVES AND HAVE-NOTS

A look at society, politics, technology and attitudes to the environment in this future scenario.

Even though the world works together as part of a virtual supply chain, countries remain very separate and entrenched within their own national cultures. There are high levels of distrust among different countries, especially between richer and poorer nations.

Work life balance and boundaries are blurred in this global workplace, especially in countries that are performing administrative and back-of-house functions that cater to corporations' value-generation elements.

Corporations drive the advancement and investment of technology because standardized and connected platforms are required for their businesses to work seamlessly across the world. However, while platforms are standardized (for example, everyone uses Android), hardware quality varies (people in richer countries have the latest handsets while those in poorer countries get hand-me-downs).

Through the increasing adoption of automation and AI the richer countries constantly reduce their dependence on poorer countries to provide labor. Skills and training are very specific

to each country depending on their main export.

Wealth is not distributed evenly across virtual supply chains. Countries become super skilled in a narrow field, placing economies at a high risk and heightening vulnerabilities.

It is difficult to move to another country as people do not possess the required knowledge and skills.

Less wealthy countries bear the consequences of climate change and are more vulnerable to extreme weather events. Some countries must deal with elevated levels of pollution as manufacturing concentrates in poorer regions that have no access to clean energy and alternative fuel sources.

Governments do not lead the charge on climate change. However, organizations recognize the benefits to their business and so unite to drive forward climate change efforts.

Countries are heavily dependent on corporations for economic growth. They rely heavily on corporate decisions regarding the location of services and manufacturing. As a result, organizations exert a strong influence over governments.

Countries become more dependent on each other for economic stability. Governments ensure that laws, regulations and policies are aligned to keep the corporate wheel running smoothly. ➔



LESS WEALTHY COUNTRIES BEAR THE CONSEQUENCES OF CLIMATE CHANGE



THE IMPLICATIONS

What are the implications for the way we work and the workplace if the marketplace is fully globalized but regional disparities persist?

REAL ESTATE

Buildings

- / Big flagship headquarters are back in fashion, alongside regional headquarters.

Landscape

- / Real estate premium varies drastically between locations.
- / Companies dictate the quality of base builds, levels of amenities and services in each market — and these can vary drastically.
- / Companies influence city planning (either negatively or positively) so that their real estate or manufacturing needs can be met in specific, desired locations.

Standards

- / Companies have global standards for their workplaces, buildings and technology. But these will be categorized by building typology and location.

PEOPLE

Employee engagement

- / Work life balance and boundaries are blurred in this global workplace, especially in countries that are performing administrative and back-of-house functions that cater to corporations' value-generation elements.

- / There is a huge disparity in roles, functions, benefits, and pay. People can work for the same corporation but be treated and compensated very differently depending on which country they are in.

Talent acquisition and retainment

- / For the worker, the market is incredibly competitive as there is a skillset surplus in each particular location
- / There's a lack of career mobility unless people emigrate. Less wealthy countries don't offer the same opportunities for learning and skills improvement as wealthier countries.

Culture and values

- / People will hack their way out of the inequality by moving from rural to urban regions and migrating (legally or not). Likewise, start-ups and entrepreneurship become adept at hacking the system.

TECHNOLOGY

AI and data

- / Data is power. Data is leverage. Data is the new dollar. Companies will use data to control, study, monitor and understand people as both consumers and employees.
- / AI will have very different impact on countries depending on their level of wealth and role in the global supply chain. For example, in some countries, AI will have obvious benefits and adds convenience to people's lives, while in other countries it threatens jobs and obliterates lower skill, task or process driven jobs.

Connection

- / Common platforms will allow corporations to standardize their processes across the globe. However, the interfaces, hardware and quality of tech will vary depending on where people live.
- / Global language (e.g. emoji) becomes widespread.

Innovation

- / Services and manufacturing are fragmented so innovation is more difficult. There's no opportunity to experience a product's entire life cycle within one country. Communities only deliver a certain services, and have no visibility over other areas of operations.

BUSINESS

Operating model

- / Companies tend to have their supply chain and the different parts of their product or service lifecycle spread out across the globe. They concentrate high-value work in specific locations while building out mass capability for process-driven functions in others.
- / Complex intra-company relations become commonplace, and companies become a lot less flexible and highly bureaucratic.

Market landscape

- / Each geographic location can be incredibly diverse in the number of industries it serves but very focused in how it serves each industry. This will lead to an employee-led market in locations where high value work is concentrated, and an employer-led market in locations where process-driven work is concentrated.

Governance

- / Countries are heavily dependent on corporations for economic growth, relying on corporate decisions regards location of services and manufacturing. As a result, organizations exert a strong influence over governments.
- / Countries become more dependent on each other for economic stability. Governments ensure that laws, regulations and policies are aligned to keep the corporate wheel running smoothly. ➔





FUTURE OF WORK THE NEXT STEPS

At AECOM, we want to build back better. We want to help global organizations enable their workforce to work effectively as individuals and teams over the next decade and beyond.

This scenario framework is just one way that we are helping clients make decisions about their future workplaces, and what the journey to get there might look like.

Our workplace teams use the four hypothetical futures presented in this document to help clients navigate uncertainty, mitigate risks and explore future eventualities. Scenario planning is a process, which has to be meaningful and relevant to each individual organization. So, we help clients consider external factors that lie beyond their control by tailoring this scenario planning methodology, helping them define their central question so that they can further understand their specific business needs and develop their real estate strategy.

Ideally, this framework should be used in conjunction with other methods such as workforce surveys and pulse polls that help companies look inwards

to deepen and extend understanding of their own workforce. At AECOM, we ran an internal competition asking our employees to consider what they thought the workplace of the future would look like across the topics of technology and connectivity; people and culture; and workspaces and office. We have written about how the winning results have informed our [Fast Forward to the Future policy here](#).

Together, these methods help us understand the complexities of the challenges before us and where workplace trends are going — so that companies can create agile, workplace strategies that are future-ready, no matter what lies ahead. [ML](#)

To explore how these scenarios could impact your companies' real estate strategy or for more info on AECOM's workplace offer, please email

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WE HELP CLIENTS CONSIDER EXTERNAL FACTORS THAT LIE BEYOND THEIR CONTROL BY TAILORING THIS SCENARIO PLANNING METHODOLOGY, HELPING THEM DEFINE THEIR CENTRAL QUESTION SO THAT THEY CAN FURTHER UNDERSTAND THEIR SPECIFIC BUSINESS NEEDS AND DEVELOP THEIR REAL ESTATE STRATEGY.