

Future workplace strategy
in the Middle East

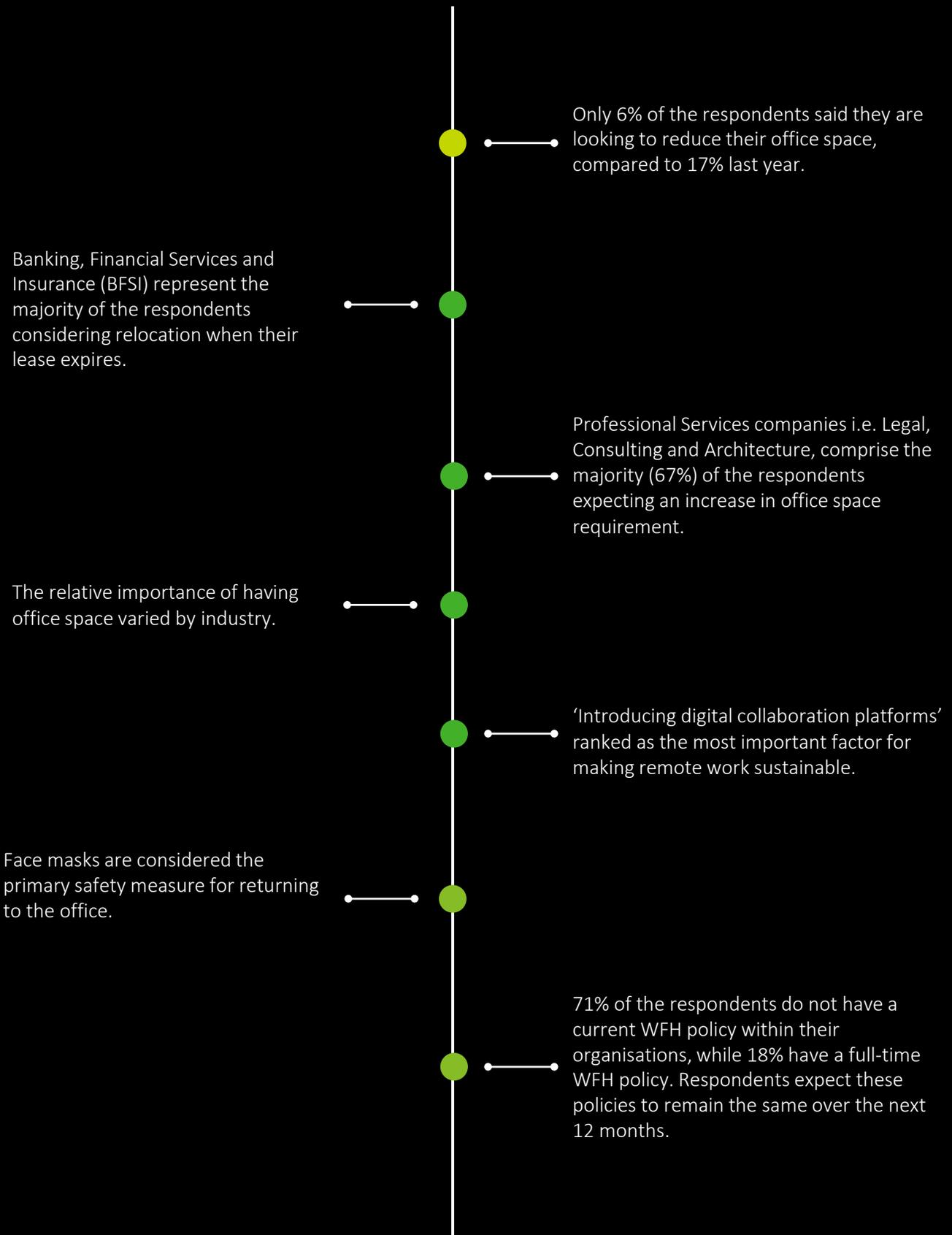
December 2021

Introduction

To help understand the current state of workplace usage and future plans, Deloitte captures sentiment from companies across the Middle East in relation to the evolving nature of their bricks and mortar requirements, work from home (WFH) experience and policies to reflect the 'new normal'.

This survey was conducted in November 2021 and the findings are based on responses from senior executives across a range of industries.

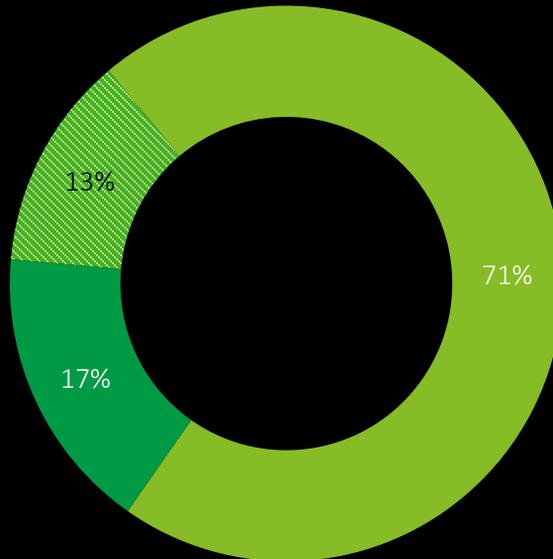
Key findings



Only 6% of the respondents said they are looking to reduce their office space, compared to 17% last year.

Expected change in space requirements when the current lease expires *November 2020*

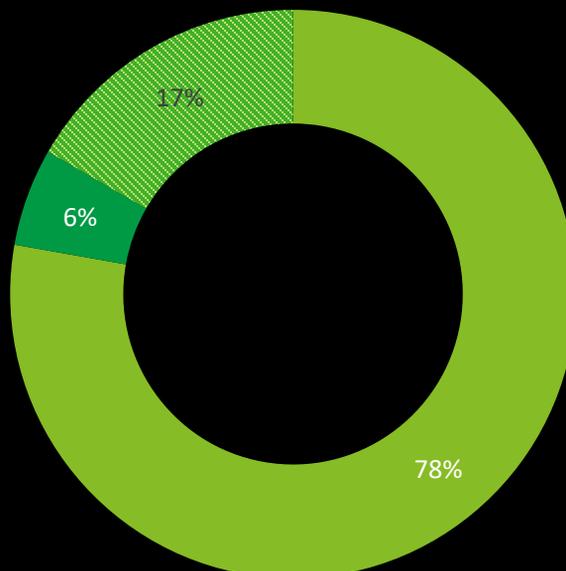
■ No change ■ Space reduction ■ Space increase



Note: Percentage may not total to 100 due to rounding

Expected change in space requirements when the current lease expires *November 2021*

■ No change ■ Space reduction ■ Space increase



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6% of the respondents expect to relocate in the same city when their lease expires.



Banking, Financial Services and Insurance (BFSI) represent the majority of the respondents considering relocation when their lease expires.



The current office size for the majority of respondents considering relocation is 3,000 sq m or more.

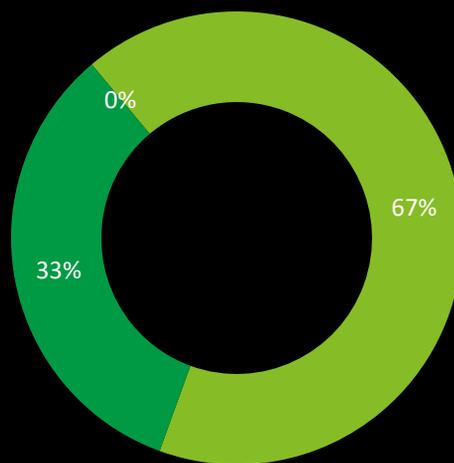


The respondents expecting to relocate, estimate an increase of 25-50% in their space requirement.

Professional Services companies i.e. Legal, Consulting and Architecture, comprise the majority (67%) of the respondents expecting an increase in office space requirement.

Expected percentage increase in office space when the current lease expires

■ 0-25% space increase ■ 25-50% space increase ■ More than 50% space increase



Expected increase in space (industry):

- Professional Services
- Banking, Financial Services and Insurance (BFSI)

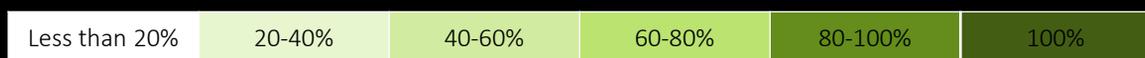
66
99

The primary reason for increased office space requirement is due to the expansion of existing business, while for 33% of the respondents the space increase will be driven by the addition of new business lines.

The relative importance of having office space varied by industry.

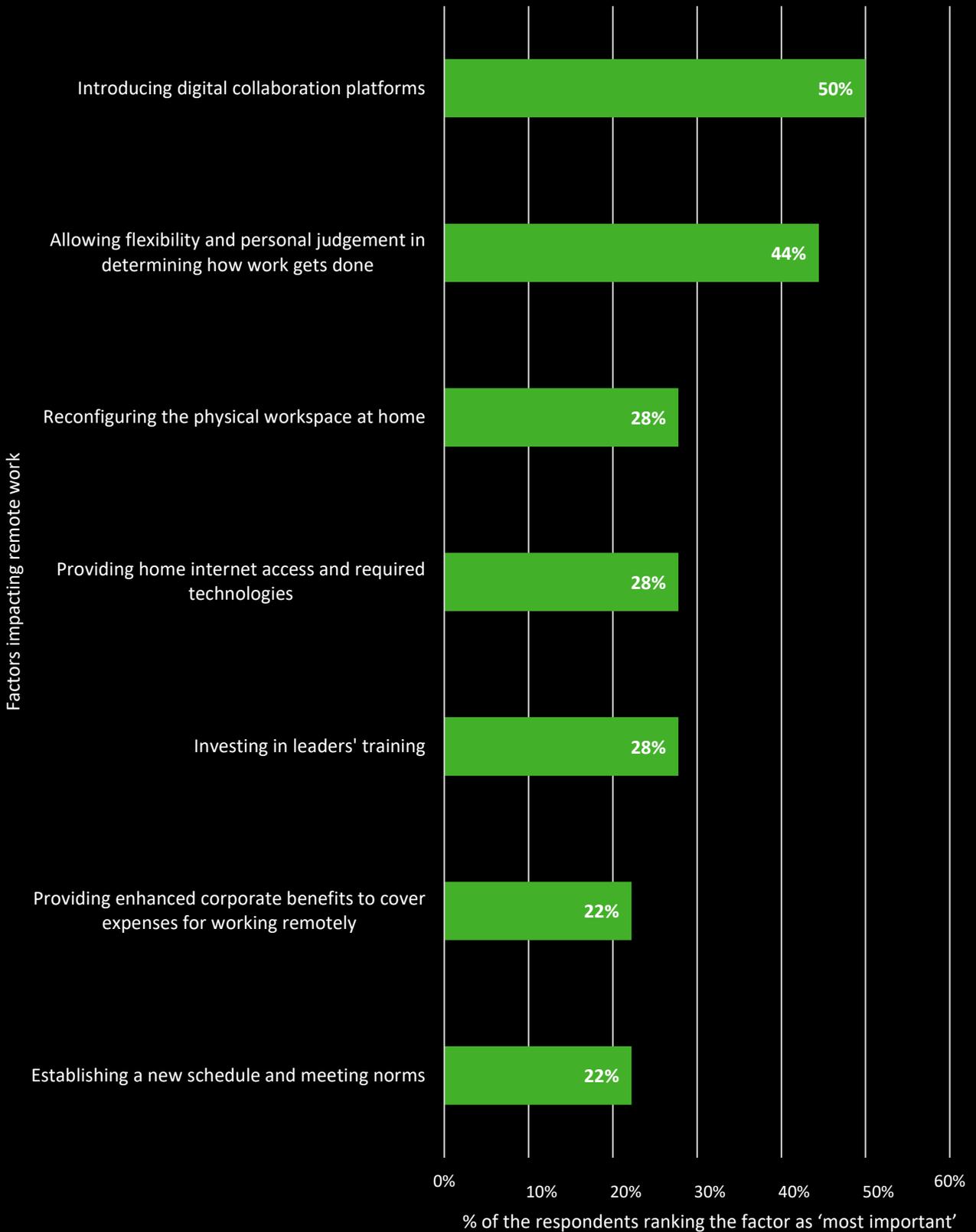
	Banking, Financial Services and Insurance (BFSI)	Consumer – Transportation, Hospitality, Retail, Wholesale and Automotive	Government and Public Services	Real Estate Investment/ Development	Professional Services – Legal, Consulting and Architecture
Social hub	Light Green	White	White	Light Green	Light Green
Ad-hoc collaboration and communication	Light Green	Dark Green	White	Light Green	Light Green
Creativity/inspiration	Light Green	White	White	Light Green	Light Green
Development/training	Light Green	Dark Green	White	Light Green	Light Green
Access to technology/filing systems	Light Green	White	White	Light Green	Dark Green
Client interface	Light Green	White	White	Light Green	Light Green
Focus/productivity	Dark Green	White	White	Light Green	Dark Green
Licensing requirements	Light Green	White	White	Light Green	Light Green

Key: % of the respondents ranking the workplace function as four or five.

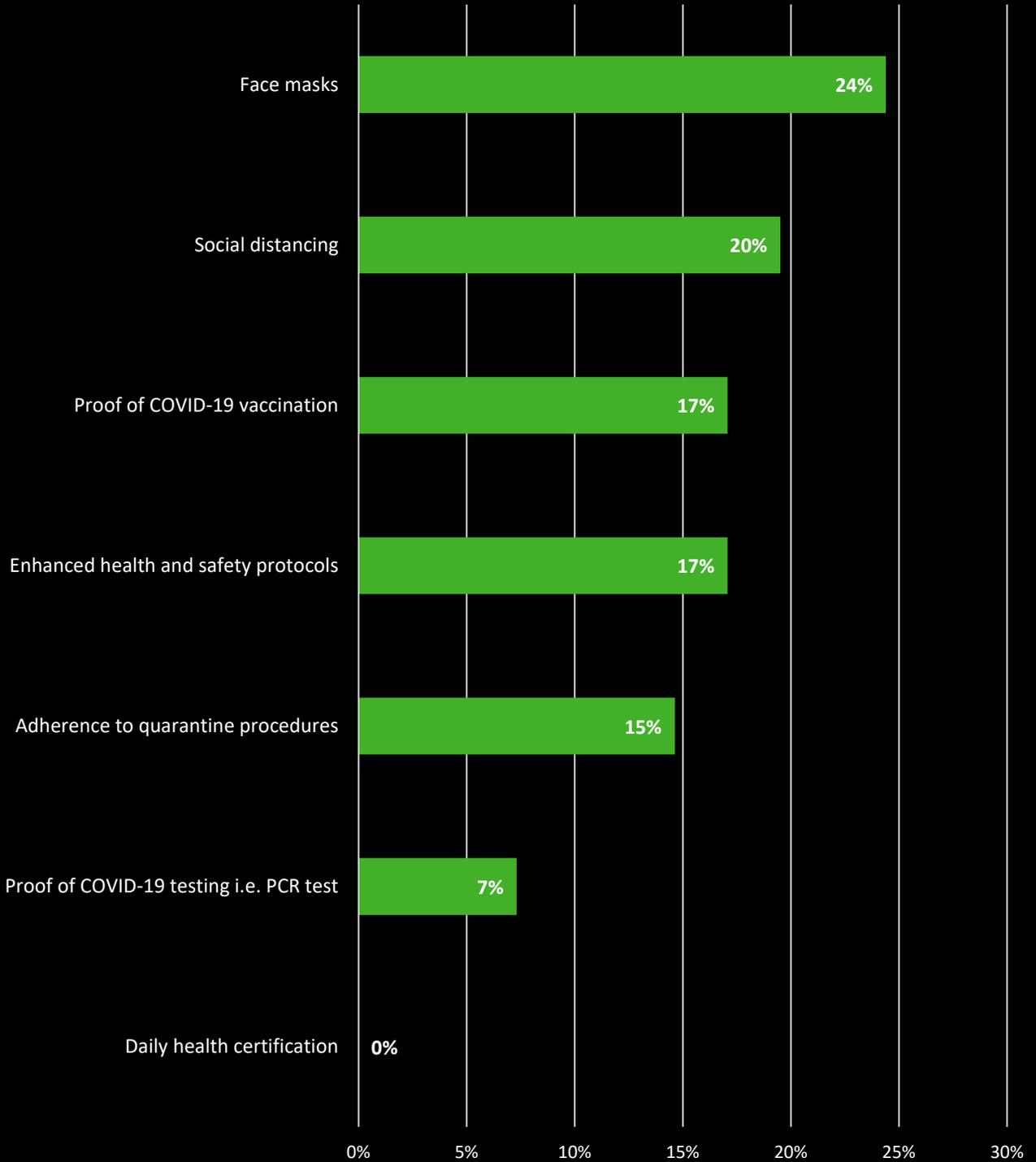


Note: The respondents were asked to rank each workplace function from 1 to 5 in ascending order of importance. Responses were not mutually exclusive as multiple workplace functions could receive the same rank.

'Introducing digital collaboration platforms' ranked as the most important factor for making remote work sustainable.



Face masks are considered the primary safety measure for returning to the office in person.



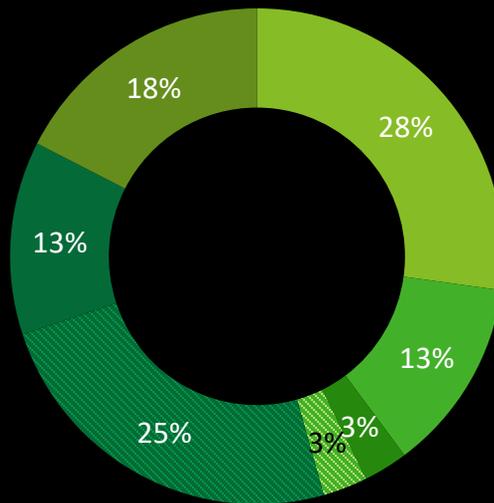
Note: The respondents were asked to select each safety measure that applies to their organisation. Multiple measures could be selected.

71% of the respondents do not have a current WFH policy within their organisation, while 18% have a full-time WFH policy. Respondents expect these policies to remain the same over the next 12 months.

Expectations of WFH policy over the next 12 months

October 2020

- 1-2 days per week
- 2-3 days per week
- 3-4 days per week
- 4-5 days per week
- No policy
- Less than once per week
- Unlimited

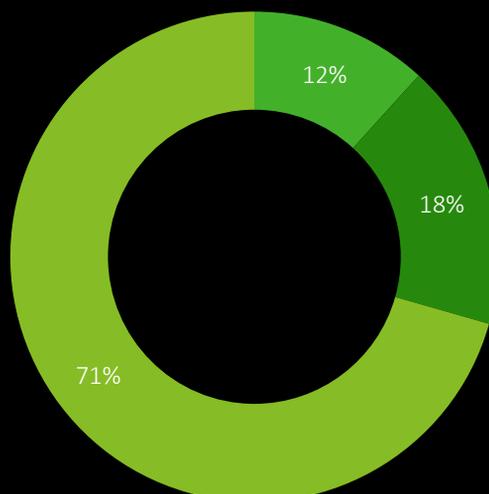


Note: Percentage may not total to 100 due to rounding

Expectations of WFH policy over the next 12 months

October 2021

- Full time work from home
- 1-2 days per week
- No policy



Note: Percentage may not total to 100 due to rounding

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