

DECADE OF DISRUPTION

FUTURE OF THE SUSTAINABLE WORKPLACE

IN THE AGE OF COVID-19
AND CLIMATE CHANGE

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EXECUTIVE SUMMARY | WILL SAVILLE

When we founded Unily in 2005, it was to provide employees with a solution to stay productive and engaged at work. Now, as we step into a new phase of workplace disruption, what employees need to be successful in the workplace is changing at pace.

At the outset of this project, we had a simple goal: to understand how the forces of climate change will impact the way we work in the future. At the time, we didn't know that a global pandemic was set to transform the very nature of work, let alone present opportunities for businesses to redesign for a more sustainable future.

As business leaders and global citizens, 2020 has taught us the importance of being prepared for future challenges. Therefore, we are proud to be releasing this timely report investigating the future of workplace sustainability in partnership with Dr. Leyla Acaroglu. This project represents a continued commitment to priming enterprises with the knowledge and strategic insight to respond to the macro-forces and microtrends that are shaping employee attitudes and the future of work.

This report is part of a wider mission to uncover what drives employees and how global trends will impact the way we work in years to come. The insights contained in these pages are designed to support us as employers, as business leaders, and as technology vendors in creating better, more sustainable workplaces for everyone.

Enterprises of the future will be defined not just by the way they treat their employees and customers, but by their impact on the world. As business leaders, we have a responsibility to strive for environmental ethics and sustainable practices, both for the people that work for us and the communities we serve.

This year Unily embarked on its own sustainability journey to actively review how we can do more as a company to reduce the impact of climate change. One of the aims of this research is to provide other businesses seeking to be more proactive in protecting the world around them with a framework for starting their own sustainability journeys.

It's our hope that the pages of this report leave you optimistic about the future and empowered to make meaningful, lasting change within your own organisations.



*Will Saville & Richard Paterson,
Unily co-founders*

The Future Is Defined By Our Actions Today

The start of this decade has brought many **disruptions** to the way we live and work, with Covid-19 and **climate change** threatening the operating status of our economy and shared home.

THE TIME FOR CHANGE IS NOW.



ABOUT THE AUTHOR

Dr. Leyla Acaroglu is a designer and sociologist at the forefront of advancing the transition to a sustainable and circular future. Her work covers many fields from creative production, applied research, behavioural economics, educational design and sustainability sciences.

In this report she applies her systems thinking future-focused mindset to explore and report on the way the future of work is being written today and the forces influencing the transformations underway. She provides a diagnostic and action toolkit designed for leaders to be a part of the change unfolding this decade for a climate positive future.

This report explores the emerging forces that are propelling a pathway towards sustainability within the workplace, starting with the cultural shifts in how and where we do business and expanding out to the operational foundations of the modern workplace.

There is no doubt that we are living in a time of great and immediate change. Covid-19 and Climate Change are just two of the most obvious forces impacting our way of life. What we will see unfold over this decade is a great amount of collective reliance in our ability to rapidly transform the way we do

everything. In this report, we explore the defining forces of this decade, the megatrends and the micro transformations that will continue to drive change. Through trend analysis, employee survey, expert interviews and case studies, forces affecting the future of workplace sustainability are revealed.

The demand for change is great, from workers, to customers and business leaders - the trend towards sustainability being an integral part of the modern workplace is emerging from multiple directions. Thus this trend report is designed to support business leaders in the process of adapting to this decade of disruption.

WHY THIS REPORT?

THE FUTURE IS NOW

If the disruptions of early 2020 have taught the world anything, it is that the future is very much undefined and impossible to truly predict what will happen next; thus, it's a space filled with endless possibilities.

This report offers a 360 degree perspective of the trends and forces influencing the transition towards sustainability in the workplace. It explores the opportunities and actions that are currently emerging as the defining forces which are shaping the transition to carbon positive and sustainable workplaces.

The last two decades have seen a rise in "green" office strategies that range from assessing the energy, waste and water consumption through to sustainable procurement and behaviour change initiatives. But now we are seeing the elevation of change towards business model transformation for the circular economy and significant disruptions to the way we work as a result of the Covid-19 crisis.

There are many forces driving these changes deep into business DNA and organisations willing to embrace them early are benefiting from being ahead of the pack.

Sustainability is an all-encompassing strategic approach to equalizing the economical, social and environmental impacts of actions, be it individually, in business, government or society at large.

Within this lives many aspects of behavioural, technological, organisational and cultural transformation that enables us all to move into a future that is more healthy, sustainable, prosperous and more positive than today.

There is a strong desire from workers and customers for socially equitable, environmentally responsible and economically viable businesses and products which is permeating all industries and becoming a defining factor on stock markets, board rooms and office discussions.

Just as the Covid-19 crisis created dramatic and quick changes to our way of living and working, so too does the rising threat of a changing climate. Thus, business leaders and managers from a wide array of industries reading this report will see that there is much opportunity in being prepared and taking positive proactive action towards being a climate positive workplace and providing incredible experiences for workers and customers alike.

A NOTE ON TERMS

We use the term 'sustainability' to encompass the concepts of environmental, social and economic considerations of actions within an organisation so that the outcome is better for the planet and people.

We also use this term to encompass important concepts and transitions, such as the Circular Economy and addressing climate change.

// A company's ability to manage environmental, social, and governance matters demonstrates the leadership and good governance that is so essential to sustainable growth, which is why we are increasingly integrating these issues into our investment process.

Larry Fink, BlackRock Letter to CEOs, 2018

THE TIMING

The research underpinning this report explored the topics of climate change, business transformation drivers, the generational shift in values and the myriad of mega trends that are driving change within this decade as they have unfolded.

This report was written in mid 2020 through the lens of business operations in established markets, exploring the impacts to the offices, HQs and central nervous systems of industry, looking at what types of important impacts are currently and will need to occur to adapt to the changing climate and the greening of business operations this decade.

HOW TO READ THIS REPORT

You will find this report presented in three main sections. The first explores a highlight of the six relevant megatrends predicted, and are already emerging as a major influencer this decade.

The second provides a detailed exposition of 12 microforces driving these Megatrends and how they relate to the workplace and shifts within business operations.

The third section provides a diagnostic toolkit for business managers to assess where they are on their sustainability journey, with a detailed set of maps of where to go from here to keep you ahead of the pack.

Every organisation will be at a different stage, as the case studies show there are many ways to engage with sustainability and multiple opportunities to lead through these complex times.

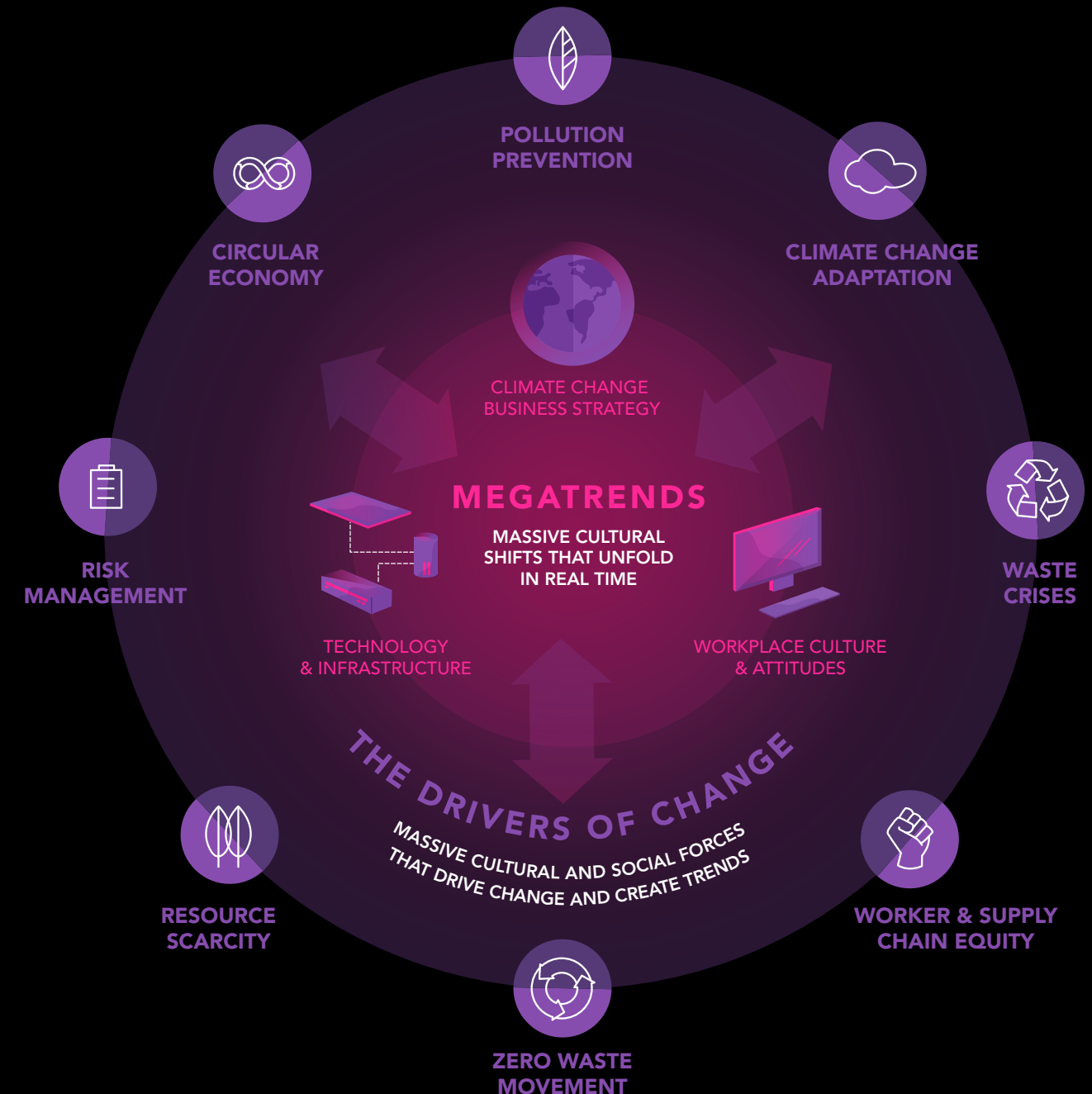
The most important thing is getting started, and this report will support you in gaining the insights and advantages of establishing a journey towards a sustainable workplace.

THE CENSUS DATA PRESENTED

As part of this exploration, 2000 UK based office workers, from graduate entry level jobs through to Senior Manager level, were surveyed by Censuswide in August 2020.

A range of questions relating to the impact of Covid-19, their perceptions of sustainability and work life changes were presented and selected data responses are shown throughout this report.

DRIVERS OF CHANGE & MEGATRENDS



WHY THIS REPORT?

DISRUPTIONS TO THE WORKFORCE

Ways of working have changed dramatically over the last 100 years. From farming to factories to technology and now services, we live in an age of rapidly evolving disruptions to where, how and why we do work. As each decade brings about new challenges and changes, the past shows that those who ignore the warning signs are often left behind, whereas those that embraced the trends of change and pioneered leadership lasted the times.

For the purpose of this report, we are exploring the central nervous system of businesses, the office-based work environment where many decisions are made. We look at what changes will affect the way headquarters and workforces operate around the world.

THE PARIS AGREEMENT

With the Paris Agreement set to take effect in 2021, the global conversation around carbon reduction, mitigation

and the cultural change needed to achieve the targets of a world that warms no more than 2 degrees is now on the minds of many leaders, from government to industry. With the reality that the world will be at least 1.5 degrees warmer by 2030 as according to the IPCC, the challenge now is to go beyond the average and take actions that will extract and sequester more carbon than we collectively produce.

The science and data have shown us that the changing climate affects all other systems and in turn, affects our individual and collective ability to flourish on this planet.

This requires multi-pronged approaches, whereby operational impacts are reduced alongside technological transformations and organisational cultural change - themes explored throughout this report.

ORGANISATIONAL REDESIGN

Executives planning to redesign their organisations to make them fit tomorrow

98%

REDESIGN PRIORITIES



Vertical cuts to departments and functions



Move to matrixed structure



Delaying

EXPECTATIONS OF DISRUPTIONS

Technological transformations will continue

85%

Rising customers expectations

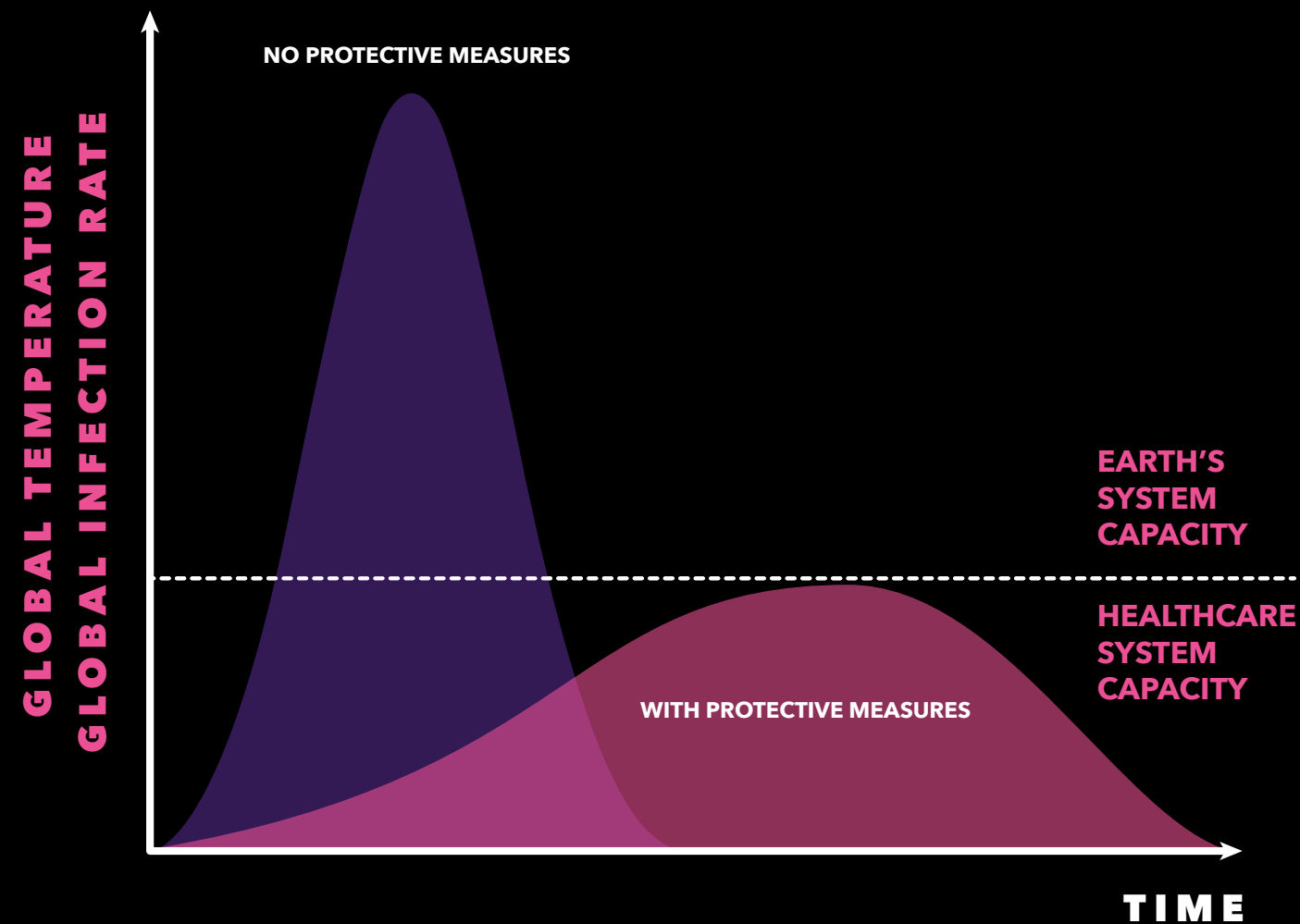
87%

Industry consolidation

80%

Source: Mercer Global Talent Trends, 2020

FLATTENING THE CURVE



The “flatten the curve” initiative to suspend catastrophic impacts on healthcare systems around the world as a result of Covid-19 has created a clear goal for many, as consolidated efforts will be required to also flatten the exponential growth of climate change. To avoid the dramatic economic losses that the global health pandemic created, proactivity must be a priority.

The effects of a changing climate are already upon us, wreaking havoc on supply chains and production processes the world over. Extreme heat and unpredictable weather events like wildfires and hurricanes disrupt man-made and natural systems, making them less resilient. The costs associated with physical infrastructure damage and financial losses through operational disruptions grow year on year.

WHAT ARE COMPANIES DOING?

Companies willing to go beyond the obvious and achieve change at multiple levels of operational activities will see net positive results for the organisation, the workforce and customers, now and into the future.

Being climate positive involves activities that go well beyond just achieving zero carbon emissions or being carbon negative. It's about pioneering leadership and redesigning the way we do nearly everything.

In the Covid-19 scenario, it became very clear that if the majority of people don't self-isolate, wear masks and take individual actions that protect the community at large, then there is

little benefit from those sacrificing to slow the disease's spread. The lack of collective action dampens the ability for government to be effective and in general, weakens the global effort to combat the virus spread, thus perpetuating the negative impacts on the economy. The same can be said when looking to address the climate crisis. We need collective change.

A great example of a company leading through climate positive action is Microsoft, who in early 2020 committed to being 100% carbon positive by 2030, mitigating all current emissions and offsetting all historical ones by 2050. Many other companies are also taking action to lead the way, creating fascinating workplace adaptations and operational changes.

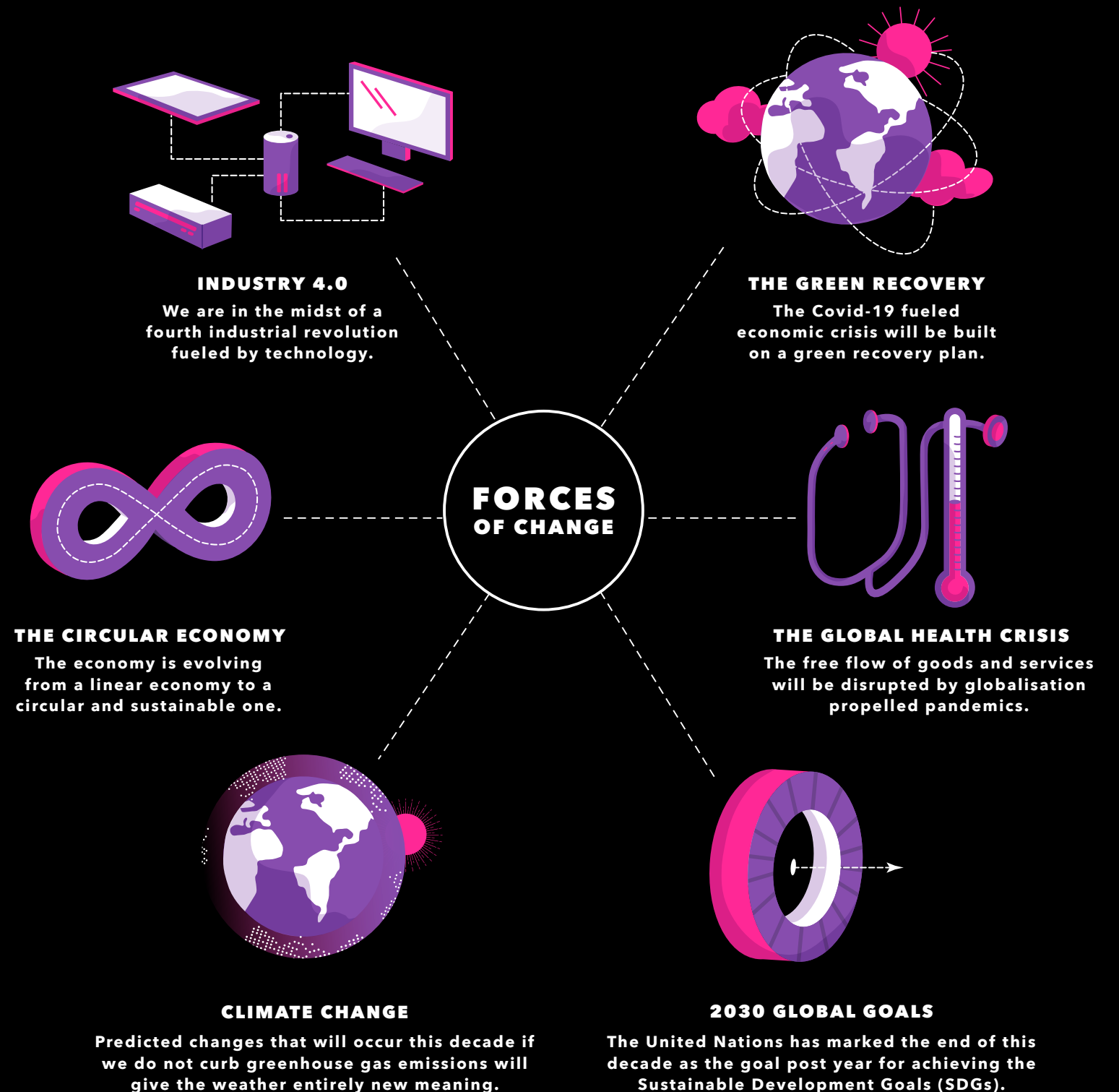
They are not alone, either; as the pages of this report show, the trend of organisations of all sizes mitigating their carbon impacts is exponentially growing. The list includes investing firm BlackRock, mining giant Rio Tinto and Delta Air Lines, along with Amazon, Apple, and Tesla, who are among the technology giants that are all committed in some way to reducing their carbon footprints.

2020-2030

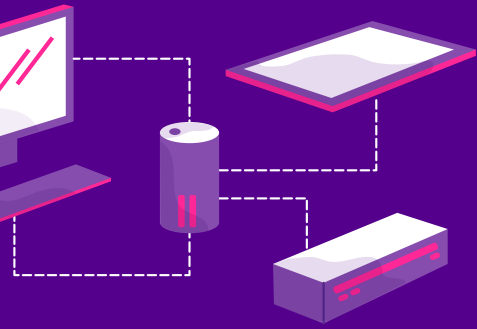
The Decade of Disruption

This decade was already set up to be one of great change even before the crises of early 2020. Transformation of the entire economy and social practices were accelerated by the global pandemic that swept around the world, wreaking havoc on markets, rapidly changing business operations, altering people's lives and challenging healthcare systems.

The Covid-19 crisis is emerging entirely new ways of working, living and doing business. But before this, the foundations for massive disruption were already being laid out for businesses, with several forces of change playing out, here we explore these.



THE SUSTAINABILITY STATUS
INDUSTRY 4.0



We are in the midst of a fourth industrial revolution fueled by technology.

The past three industrial stages of development started with the mechanicalisation of processes through steam and water to the development of production lines powered by electricity and more recently the introduction of computer aided technology. Now we are moving into Industry 4.0, fueled by the digital transformation, including artificial intelligence, robotics and networked communication systems.

Exponential changes in technological development are altering the way we manufacture, produce, and consume goods and operate within the economy, offering significant opportunities to increase efficiency, reduce waste and streamline production processes.

Offices, factories, cities and homes are getting 'smarter'. When designed well, this can lead to significant efficiency, productivity and climate positive gains. This was evidenced by the rapid adoption of at home work and telecommuting required during the Covid-19 pandemic.

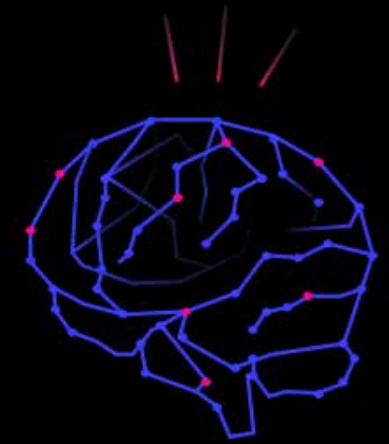
// This manufacturing revolution will increase productivity, shift economics, foster industrial growth, and modify the profile of the workforce.

Industry 4.0, Boston Consulting Group, 2020

THE FOURTH INDUSTRIAL REVOLUTION



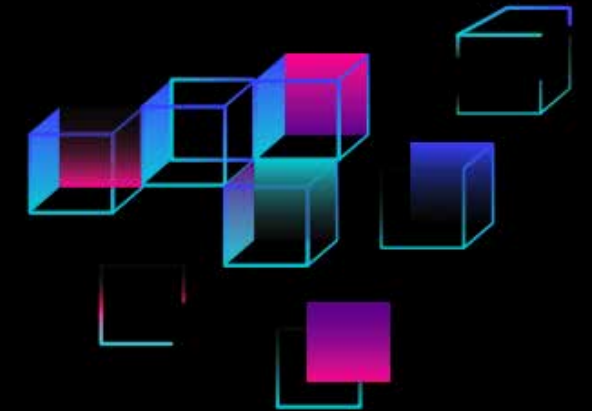
NETWORKED COMMUNICATIONS SYSTEMS



ARTIFICIAL INTELLIGENCE

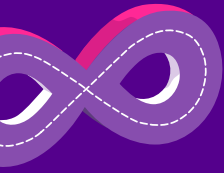


ROBOTICS



DIGITAL TRANSFORMATIONS

THE CIRCULAR ECONOMY



The economy is evolving from a linear 'take, make, waste' economy to a circular and sustainable one.

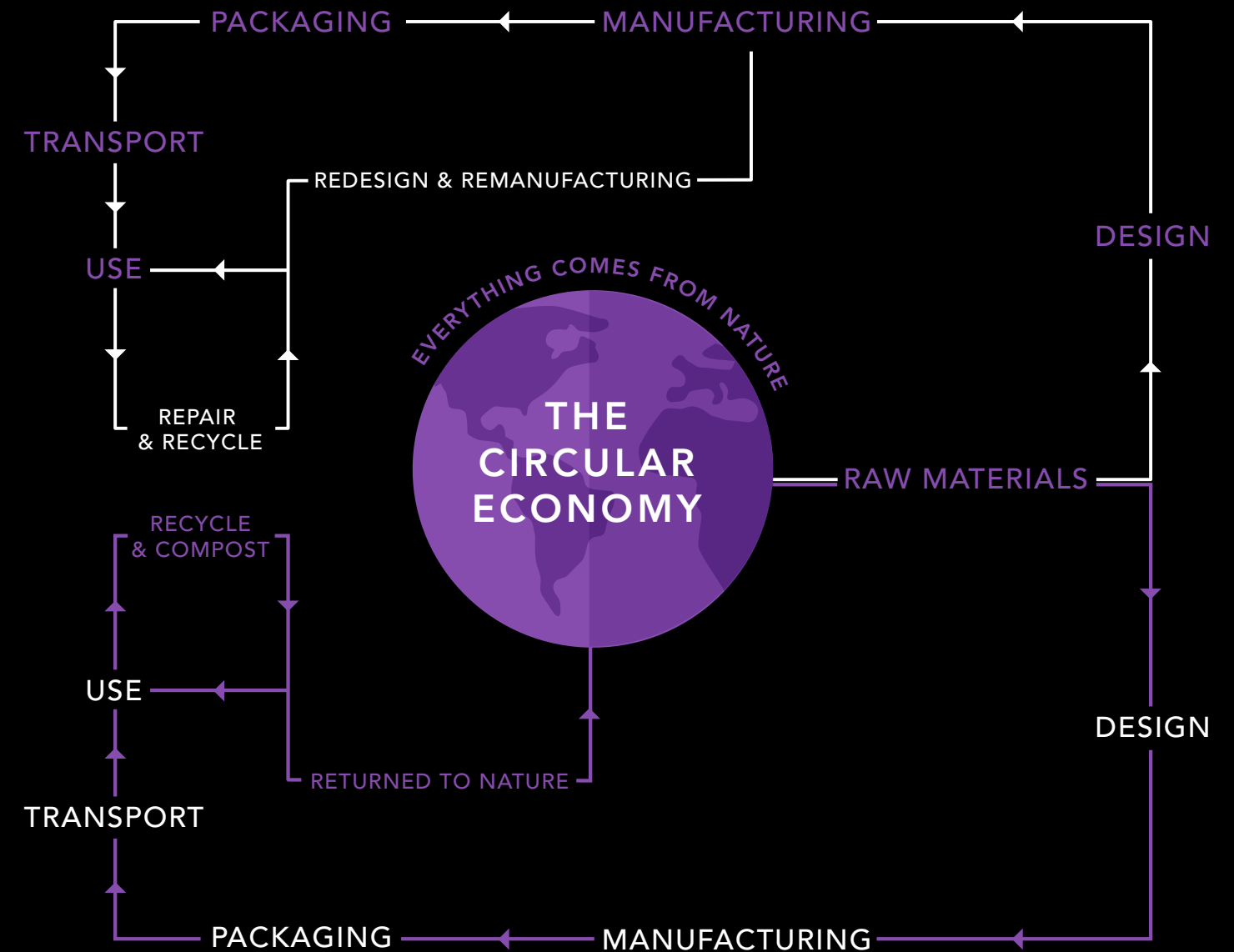
In response to the global waste and pollution crises, the Circular Economy calls for a total reconstruction of how we design, produce, deliver and discard goods and services that make up the economy.

This involves moving from linear production processes - whereby waste and pollution are inherently built into the provision of goods and services - to a circular system that allows for new business models, design processes and supply chains to cycle resources through well-designed closed-loop systems. Waste is eliminated, resource extraction is reduced and relationships with customers are increased.

Products become services and entire value chains are redesigned and managed to eliminate losses, increase and maintain the value of materials extracted from nature, and develop long-term economic gains.

// Adopting circular-economy principles could not only benefit Europe environmentally and socially but could also generate a net economic benefit of 1.8 trillion by 2030.

Europe's Circular Economy, McKinsey Center for Business and Environment, 2015



The Circular Economy model aims to reduce waste coming from the beginning stages of raw material extraction through to the end of use and back into the technical or biological cycle as feedstock for the next use phase. Biological loops are closed through methods such as recycling & compost, while technical loops are closed through methods such as redesign & remanufacturing. This closes the loop on the supply chains to reduce new material resources demands, and eliminates waste from escaping back into nature.

CLIMATE CHANGE



Humans have long had an obsession with tracking the weather.

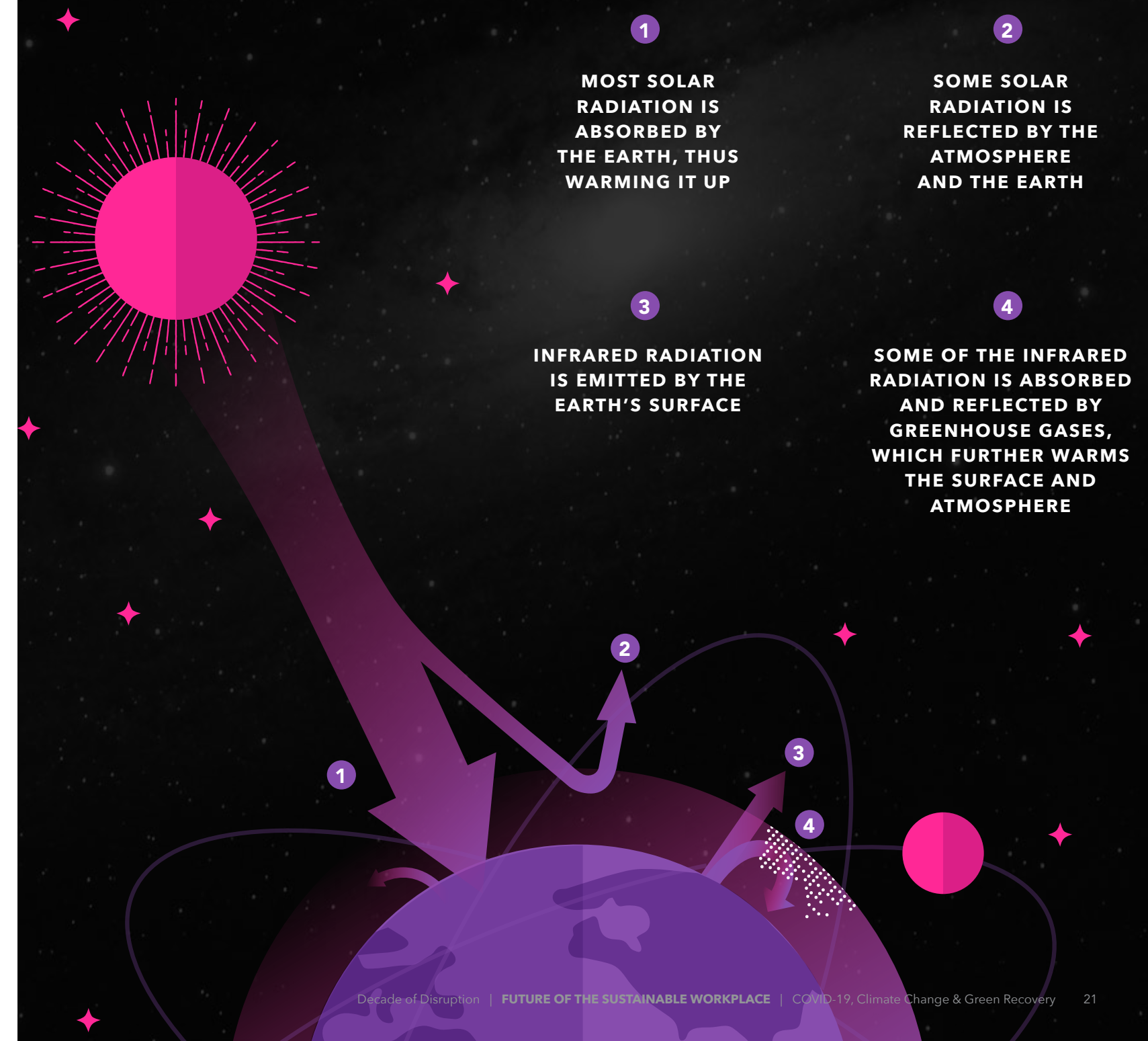
And now, the weather is forcing us to change the way we do things. For much of our history, the ability to predict the weather has helped us build, feed and navigate societal development. The current and predicted changes that will occur this decade if we do not curb global greenhouse gas emissions will make reading the weather take on an entirely new meaning as we see more freak weather events, longer and hotter summers, increased frequency of catastrophes and rising sea levels that impact coastal regions.

January 2020 started with the hottest and most intense fires ravaging Australia, following a deadly fire season in California and Europe. The degree of impact to property, the economy, lives and land will depend on the actions taken now to curb carbon, and with nearly all countries in the world ratifying the 2016 Paris Agreement, there is hope that the worst will be avoided and the best brought out in our global community.

Ambitious climate action could generate US\$26 trillion in economic benefits between now and 2030, and create 65 million jobs by 2030, while avoiding 700,000 premature deaths from air pollution.

Adapted from [The New Climate Economy: Report of The Global Commission on the Economy and Climate, 2018](#)

EFFECTS OF CLIMATE CHANGE



1

MOST SOLAR RADIATION IS ABSORBED BY THE EARTH, THUS WARMING IT UP

2

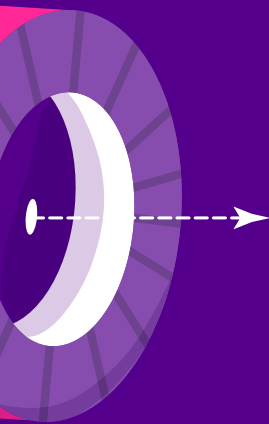
SOME SOLAR RADIATION IS REFLECTED BY THE ATMOSPHERE AND THE EARTH

3

INFRARED RADIATION IS EMITTED BY THE EARTH'S SURFACE

4

SOME OF THE INFRARED RADIATION IS ABSORBED AND REFLECTED BY GREENHOUSE GASES, WHICH FURTHER WARMS THE SURFACE AND ATMOSPHERE



The United Nations has marked the end of this decade as the goal post year for achieving the Sustainable Development Goals (SDGs).

The SDGs are a set of 17 global goals that, if achieved, will bring about a sustainable and equitable economy.

Many companies are adopting the SDGs as operating guidelines for corporate activity.

Despite there still being disconnects between rhetoric and action, there is a strong drive for this decade to be one where global action on sustainable development is made and successes achieved, driven by business leadership.

Companies all over the world are now tracking their performance against the 17 SDGs and reporting on new actions taken to enable the accomplishment of them.

// The world is coming to recognize more and more that problems in one country reverberate in another. A crash in one market can drive a crisis around the world. That is why it is so important to make the most of our collective strengths.

Former United Nations Secretary-General Ban Ki-moon

CORPORATE SDG UPTAKE

Companies that **mention** the SDGs in their reporting



72%

Companies that **include** the SDGs in their business strategy



25%

Companies that include specific SDG **targets** in their business strategy

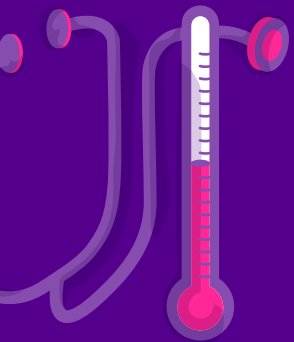


14%

Source: PwC SDG Challenge, 2019

THE SUSTAINABILITY STATUS

GLOBAL HEALTH CRISIS



The free flow of trade, people, capital and goods will be disrupted by globalisation-propelled pandemics.

The World Health Organisation has long been calling for concern over the threat of global health pandemics. The Covid-19 crisis has certainly changed the way we live and work. Had communities and healthcare systems been more prepared, the economic and personal losses would be telling a different story to the one of global disruption caused by this pandemic.

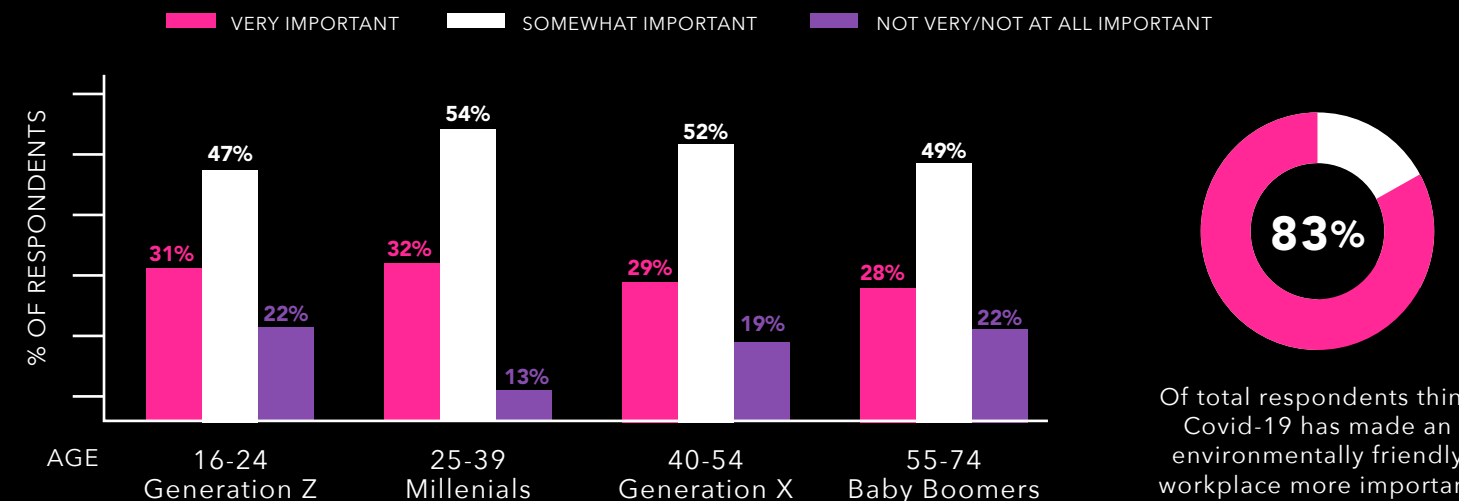
The long-term impacts are still so unknown, as is the potential for an increase in pandemics in the future. The crisis has drawn many parallels to the needed action in combating climate change, as the response to the Covid-19 reminded many that action to abate the negative impacts of climate change also requires collective action and immediate changes to the way we run the economy.

“ Many of the root causes of climate change also increase the risk of pandemics. Deforestation, which occurs mostly for agricultural purposes, is the largest cause of habitat loss worldwide. Loss of habitat forces animals to migrate and potentially contact other animals or people and share germs.

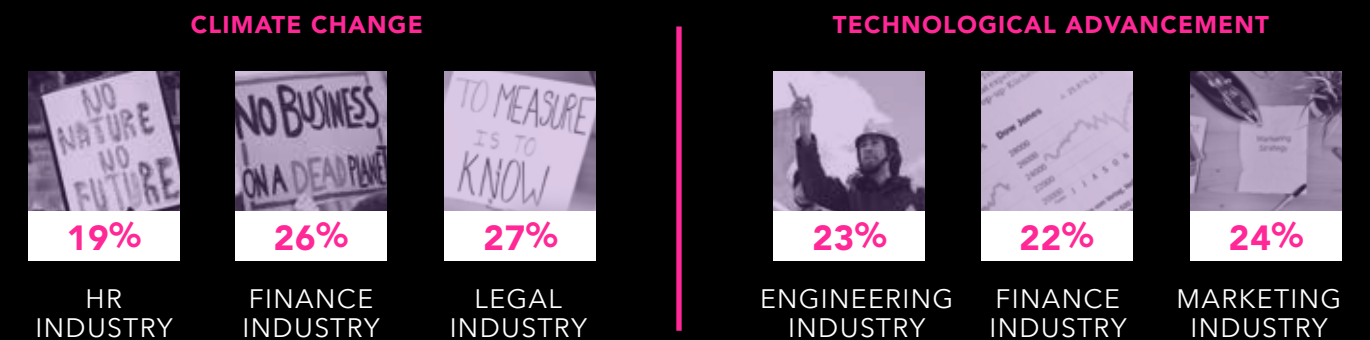
Coronavirus and Climate Change, Harvard T.H. Chan School of Public Health, 2020

THE COVID-19 EFFECT

HAS COVID-19 MADE AN ENVIRONMENTALLY FRIENDLY WORKPLACE MORE IMPORTANT?



WHAT WILL HAVE THE MOST IMPACT ON THE WAY YOU WORK POST-COVID-19?



Source: The Unily Future of Workplace by Censuswide, 2020



The Covid-19 fueled economic crisis will be built on a green recovery plan.

This is especially true for the European Union, as they are driving the campaign to build back better by tying economic incentives to climate-positive actions for a more sustainable and resilient economy.

The International Energy Agency, governments around the world, major corporations and investor groups alike are all spearheading the connection of massive coronavirus stimulus packages as a driving force behind the rapid transition to a green economy.

Clean power, electrification of cars, investment in new technology and massive job creation is the goal in achieving an estimated 8 percent drop in carbon emissions in 2020.

// Governments have a once-in-a-lifetime opportunity to reboot their economies and bring a wave of new employment opportunities while accelerating the shift to a more resilient and cleaner energy future.

Dr Fatih Birol, International Energy Agency Executive Director

THE UNITED NATIONS GREEN RECOVERY PLAN

Aiming for carbon neutrality by 2050 and the protection of biodiversity, the UN's green recovery plan outlines:

- Monetary recovery packages that deliver new jobs and businesses through a clean and green transition.
- When taxpayers' money is being used to rescue businesses, it should be tied to achieving green jobs and sustainable growth.
- The use of fiscal firepower to drive a shift from the current gray to a green economy, empowering societies and people to be more resilient.
- Public funds should be used to invest in the future and flow to sustainable sectors and projects that help the environment by ending fossil fuel subsidies and encouraging polluters to pay for the impacts that they create.
- Climate risks and opportunities need to be incorporated into the financial system at large, as well as all aspects of public policy making and infrastructure.

Source: Secretary-General's Message, António Guterres, 2020

The Megatrends Shaping The Future

Megatrends are massive cultural shifts that unfold in real time, creating identifiable patterns that can be observed and interacted with as they emerge and evolve to affect society at large.

There are several societal level megatrends that are affecting the ways we work and the types of business models that will be successful in the future.

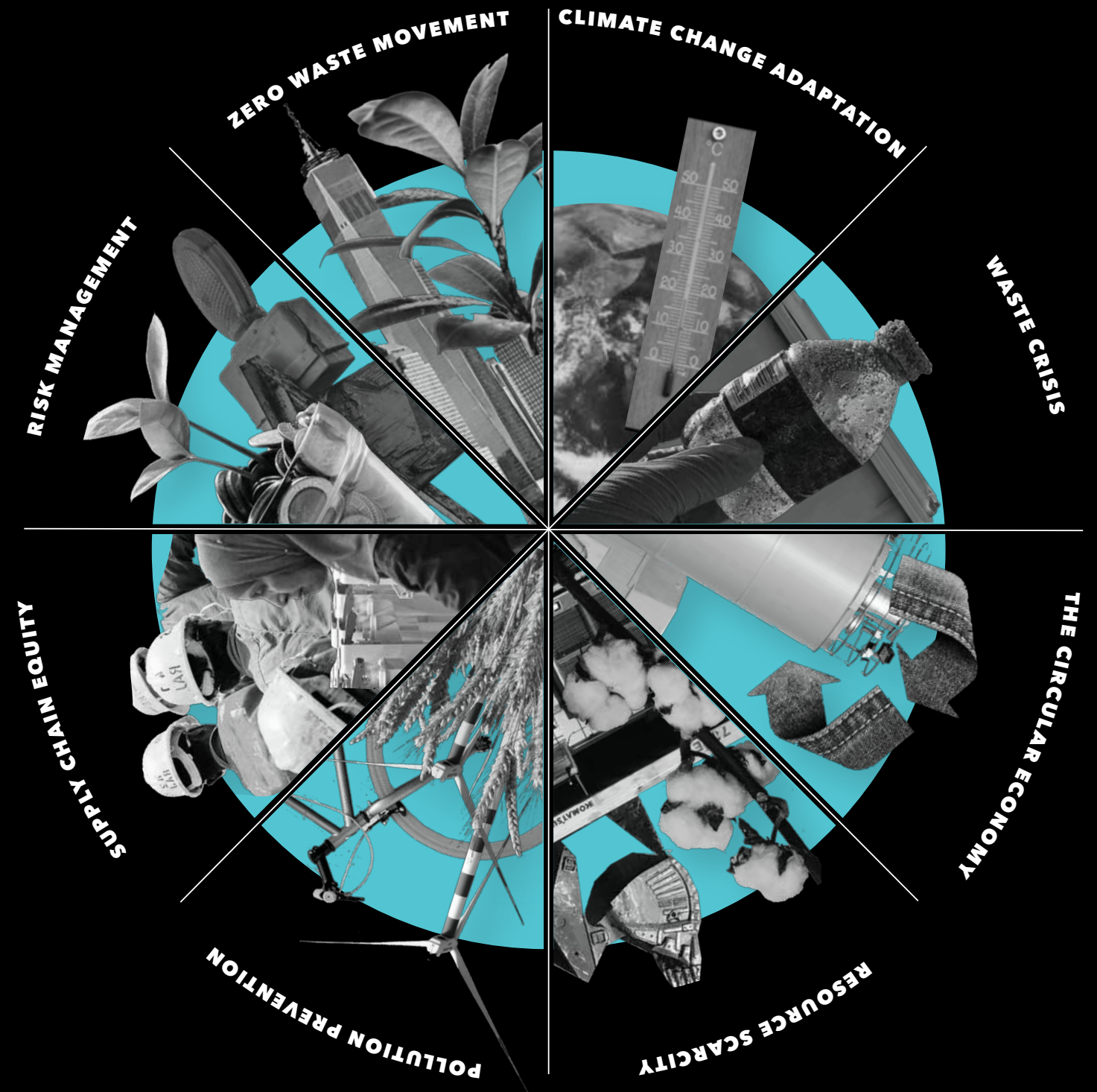
THE FUTURE IS CHANGED BY OUR ACTIONS TODAY.

These trends are a manifestation of the behaviors, desires, aspirations and actions of those operating in the workforce and business world right now. Many leading trend analysis organisations - such as [PWC](#), [Deloitte](#), [BlackRock](#), [ESPAS](#), [International Labor](#)

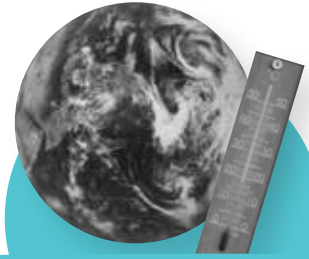
[Organisation](#) and [MIT](#) - have all pointed to a convergence of megatrends that are already well underway and which will continue to affect the global economy and flow into our working and personal lives.

One of the main recurring megatrends in all the reports is climate change and the economic disruptions that it brings, specifically in regards to the energy industry, resource scarcity and supply chain changes.

Other megatrends affecting this decade include demographic shifts such as urbanisation, massive technological changes like AI and automation, the concentration of and geographical changes to wealth distribution and the potential risks of global pandemics as well as wars.



THE MEGATRENDS



CLIMATE CHANGE ADAPTATION

This is the reduction in actions that contribute to the release of atmospheric compounds that trap heat and increase the temperature of the Earth, which has led to more extreme weather events and irreversible changes to the global climate systems. We will see an increase in actions that promote a climate-positive society at all levels, from government to business and individual citizens.

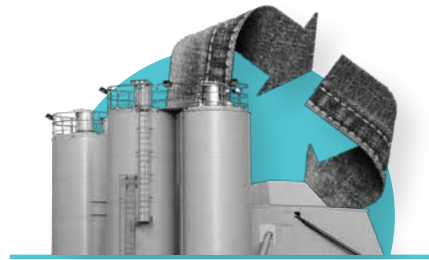


POLLUTION PREVENTION

There are ongoing actions to reduce emissions to air, water, and land from factories, cars and other industrial processes so that there is a significant reduction in pollution-related issues, from air pollutant deaths to water and land contamination. Environmental management is now considered through direct and indirect impacts by understanding and working with the entire value and supply chain, along with taking full responsibility for the impacts of business activities.

TRANSITION TO THE CIRCULAR ECONOMY

Industry transforms towards business models and production processes that enable products to be recaptured and reused in higher value ways, massively reducing waste and increasing customer satisfaction. Materials flow through value chains that ensure that waste is recaptured, and businesses move to closed-loop production models, while customers adapt to reuse, repair and recapture systems.



RESOURCE SCARCITY

Global supply chains consume vast amounts of natural resources, and the exponential growth of linear products has placed significant pressure on natural systems, resulting in less available resources - with some reaching a critical point of scarcity. As resources become more expensive and rare in nature, we will see a shift towards more effective management of resources and protection, waste mining and significantly more efficient methods of capturing and reusing high-value materials. Global security depends on our ability to protect natural resources needed for a healthy society.



WASTE CRISES

2018 started the collapse of the global recycling industry, with China refusing to continue taking the world's trash. This led to a reckoning with the addictive nature of waste generation in a linear economy. Coinciding with the rise in awareness and concerns around ocean plastic waste, we are seeing a push towards reducing the reliance on single-use disposable plastic products especially, but waste at all levels such as food and fashion is also seeing consumer-driven demand for changes.



RISK MANAGEMENT

Many of the world's biggest financial institutions, underwriters, investors and shareholders are now demanding that decisions be made with respect to climate change and social equity due to the real risks and threats that these pose to financial security. These concerns have been brewing for many years, and even before the Covid-19 crisis, organisations were starting to rethink the way they do business so that they could meet pressures to act on climate change, respond to resource scarcity issues and meet the growing consumer demand for zero waste and ethical supply chains. Covid-19 has expedited the adjustment to these trends, and the need for business operations to change will only increase over the next decade.

ZERO WASTE MOVEMENT

The consumer backlash against hyper-disposable design is growing, as the tide of plastic washes up on beaches around the world. This has prompted a movement of consumer-led practices that reject products that are overly packaged or single-use and instead seek out services, shops and consumer goods that enable a reduction in personal waste production to zero or below. This involves the adaptation of entirely new business strategies, whereby linear product delivery systems are transformed into circular ones and waste is designed out of the entire system.



WORKER & SUPPLY CHAIN EQUITY

Sustainability is about social equity as much as it is about environmental protection, and many organisations now have to assess and change supply chains to ensure that there is equity to workers and producers, fair wages, safe working conditions, a massive reduction in ecological impacts and no unethical processes, illegal activities or harmful actions embedded in the way goods and services are produced and delivered to market. Furthermore, companies must fully integrate diversity and equity training to enable just and fair workplaces for people of all races and identities.



THE UNILY 2020 CENSUS

DATA FROM 2,000 UK BASED OFFICE WORKERS CONDUCTED AUGUST 2020 BY CENSUSWIDE

65% RESPONDENTS MORE LIKELY TO WORK FOR A COMPANY WITH A STRONG ENVIRONMENTAL POLICY

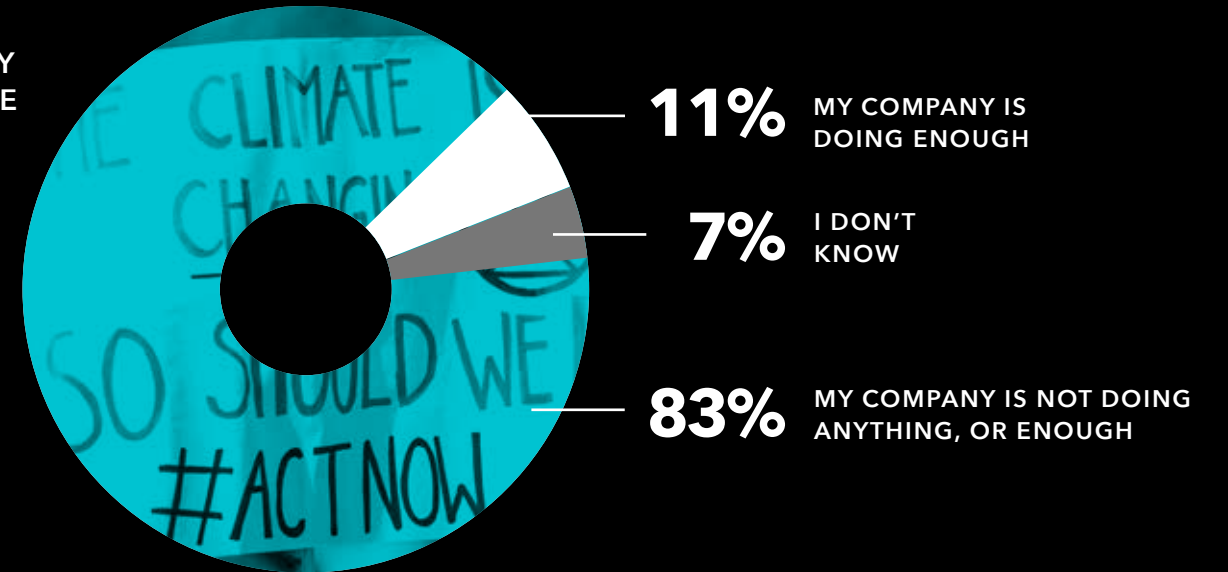


72%

RESPONDENTS CONCERNED ABOUT ENVIRONMENTAL ETHICS



TO WHAT DEGREE IS YOUR COMPANY FIGHTING CLIMATE CHANGE?



63%

OF RESPONDENTS WOULD LIKE TO LEARN MORE GREEN SKILLS TO BECOME MORE VALUABLE IN THE WORKPLACE



57%

OF EMPLOYEES SAID THEY NEED MORE INFORMATION ON THEIR COMPANY'S ENVIRONMENTAL GOALS



46%

OF EMPLOYEES SAID THEY NEED MORE SPECIFIC TRAINING ON ENVIRONMENTAL GOALS



RESPONDENTS WHO SAY THEIR COMPANY'S ENVIRONMENTAL VALUES ARE EITHER NOT ALIGNED OR ONLY PARTIALLY ALIGNED WITH THEIR OWN



RESPONDENTS WHO SAY THEIR COMPANY DOES NOT COMMUNICATE THEIR ENVIRONMENTAL GOALS WELL OR AT ALL



RESPONDENTS WHO WOULD DEFINITELY OR POSSIBLY TURN DOWN A JOB OFFER FROM A COMPANY WITH A BAD ENVIRONMENTAL RECORD



Source: The Unily Future of Workplace by Censuswide, 2020

THE DRIVERS OF CHANGE

Trends are driven by forces for change of which there are many influencing changes. In exploring the megatrends and the disruptive shifts defining this decade, 12 drivers of change emerged demonstrating micro transformative forces shaping the way businesses operate and workplaces evolve.

In this section, we explore the relationship between business and sustainability, showing the drivers influencing change as identified through our trend analysis. We explore how they emerged and what pioneering organisations are already doing to adapt to these influential forces, showing how Covid-19, sustainability, climate change, and the Circular Economy are affecting the workforce in multi-pronged ways.

THE DRIVERS OF CHANGE

CLIMATE CHANGE & BUSINESS STRATEGY



CLIMATE POSITIVE CHANGE



PROACTIVE LEADERSHIP



CIRCULAR TRANSFORMATIONS



BUSINESS MODEL REDESIGN

WORKPLACE CULTURE & ATTITUDES



VALUE ALIGNED



WORKER ACTIVISM



FLEXIBLE WORKLIFE



GREEN JOBS

TECHNOLOGY & INFRASTRUCTURE



DIGITAL TRANSFORMATION



WORK LESS BUT BETTER



LIVING BUILDINGS



POST DISPOSABLE

CLIMATE CHANGE & BUSINESS STRATEGY

Due to the increasing impacts and threats of climate change, workers, investors, customers and governments alike are demanding changes to the way companies take care of the impacts they make through their business activities.

Every industry is being called to act in different ways, but overwhelmingly businesses need to act on their social and environmental obligations - and in many cases already are.

All aspects of business activities draw on many complex systems that, in turn, result in multi-level impacts and pollution back into the atmosphere and environment.

From resource extraction to production and transport greenhouse gas emissions to the daily waste generated in office buildings - these are all contributing

factors when we look at the cumulative effects that “doing work” has on the climate crisis and global sustainability.

The need to create goods and services that are designed to have a positive effect on the environment, redesign business models to embrace sustainability, and set new standards for business operations are critical to the success of organisations in this decade.

Not only do people want to see action on climate change, but employees are also demanding that their companies change so that they are aligned with their values.

Achieving sustainability in this decade presents a series of challenges and opportunities for the workforce, changing the types of jobs that are required, the skill sets

needed, the places and ways we get to and perform work tasks, along with changes to workplace culture.

The way we do business has already been dramatically disrupted as a result of Covid-19, but the demand for addressing climate change from internal and external drivers is ensuring that senior leaders metamorphize business strategy to ensure that actions have considered impacts and taken clear steps for ensuring that outcomes are beneficial at the individual and societal level. Thankfully, there are many companies already leading the way and demonstrating their commitment to taking a full-spectrum approach to tackling climate change.

The demand for products and services to have ethics embedded into their DNA is ensuring that companies challenge their own way of doing things, overcoming preconceived ideas about what is possible.

We saw this unfold in companies who, before Covid-19, thought that

working from home was a bad idea, as suddenly many had to rapidly adapt to the reality of it being feasible. Some are even deciding to stick to it long term. Twitter and Fujitsu are just two companies who have implemented indefinite work from home policies, and many more are seeing the benefits of reducing the footprint of costly office spaces.

There is no one-size-fits-all solution to the changes that this decade is ensuring will unfold, but the striking reality is that all organisations must change their strategy to doing business.

// At its essence, sustainability means ensuring prosperity and environmental protection without compromising the ability of future generations to meet their needs. A sustainable world is one where people can escape poverty and enjoy decent work without harming the earth’s essential ecosystems and resources; where people can stay healthy and get the food and water they need; where everyone can access clean energy that doesn’t contribute to climate change.

Former UN Secretary-General Ban-Ki Moon

CLIMATE POSITIVE CHANGE

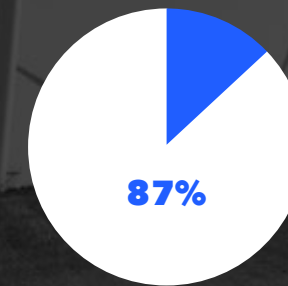
Driven by the global societal need to decarbonise the economy, organisations will adopt a diverse array of daily practices, structural changes and operational transformation to move from carbon negative to carbon-positive companies.

This will be seen through dramatic shifts in energy use and the reduction of the carbon footprint of all operational aspects of a business, by incorporating actions that include 12 significant changes.

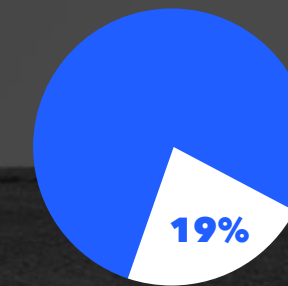
Significantly less travel, especially air travel	New standards for measuring corporate and product-related emissions
Buildings redesigned to reduce energy use and incorporate passive energy systems	More flexibility for workers regarding worker locations and times
Investment in green energy and mitigation strategies	More transparent governance
Introduction of more smart technology that enables feedback loops to reduce energy use and alter behaviors	Divesting from fossil fuels
Major shifts to low carbon energy sources, both localised and as investments, and empowering consumers and employees to make low carbon choices	Transformation of business models to move from linear to circular and sustainable product and service
Increase in telecommuting and digital communication	Increased performance reporting being connected to sustainability goals

GOOGLE

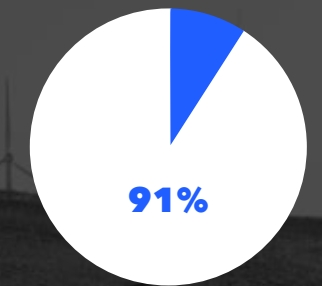
Technology giant Google is accelerating its transition to carbon-free energy production, having secured many large-scale long term contracts for 100% renewable energy provisions. They are also finding unique new ways of reducing server energy use, designing campuses with ecologically-focused landscapes, offering sustainably-sourced food in all their offices, and flexible work conditions. They are one of the world's largest investors in renewable energy infrastructure, buying enough wind and solar energy to cover every unit of electricity their operations consume.



GLOBAL DATA CENTERS WASTE DIVERTED FROM LANDFILLS



2018 REFURBISHED INVENTORY COMPONENTS USED FOR SERVER UPGRADES



IT ENERGY USE THAT HAS ISO 50001 CERTIFICATION FOR GOOGLE OWNED DATA CENTERS

Source: Google 2019 Environmental Report

PROACTIVE LEADERSHIP

The leaders of the past may have been okay with avoiding or even denying that action on environmental and social issues are important, but the leaders of the present and future will be defined by how they pioneer change within their organisations today.

By incorporating climate change policies into an organisation's DNA, proactive leaders see extreme weather events like floods and wildfires as risks to the global economy and understand that negative impacts on natural systems will ultimately impact their bottom line. So, they choose to be ahead of the curve rather than wait to react as a new crisis unfolds.

This new breed of leader sees climate action and sustainability initiatives as not only the right thing to do, but also as a generator of competitive advantage and

economic benefits through customer satisfaction, worker retention and risk mitigation.

Evidence of deep changes in corporate governance, business reputation, collaborative responses to competition and business model transformation are just some of the actions these new leaders are implementing.

The skills and capabilities required of this type of leader will shift, necessitating more integrity, social and emotional intelligence skills, systems wide perspectives, and courage to overcome the profits and losses mindset that blinds people to the current linear status quo.

These leaders will hire new green-skilled employees, create new divisions and have chief sustainability officers contributing to all levels of decision making.

CASE STUDY

PATAGONIA

A long-time leader and promoter of corporate governance and sustainability, Patagonia has committed to being carbon neutral by 2025. Since 1985, Patagonia has pledged 1% of sales to go to preserving and restoring the natural environment. Additionally, 72% of their products have recycled materials, they use many organic and natural fibers, commit to fair trade practices across their supply chain, and have a transparent conversation with customers about how they are constantly seeking to improve both social and environmental performance. They partnered with iFixIt.com to offer repair of their products in-store, and encourage resale of no longer needed items.

Source: Patagonia, 2020



Who are businesses really responsible to? Their customers? Shareholders? Employees? We would argue that it's none of the above. Fundamentally, businesses are responsible to their resource base. Without a healthy environment there are no shareholders, no employees, no customers and no business.

Yvon Chouinard, Patagonia Founder

CIRCULAR TRANSFORMATIONS

Business models go from linear to circular by design, in which the current waste-based linear model is transformed into closed-loop circular product service delivery models that close the loop on material flows.

This transformation is elevated through innovations in business models and service delivery design, whereby companies no longer create, sell and renege on the end of life impacts of what they deliver to the market. Instead, they design products that are repairable, reusable, upgradeable, refillable and fully recyclable.

They take stewardship over the full life of what they create. Then they take them back when no longer needed, designing the full-service around the product, investing in relationships rather than just sales targets.

Reverse logistics, life cycle assessments and subscription services are just some of the tools that enable the circular transformation that is already underway.

Product stewardship, sustainable design strategies, subscription models and value-based relationships are all part of this transformation trend being driven by resource scarcity, commodity prices, consumer demand for ethical products, climate change risks and the global waste crisis.

// Embracing a circular economy that emphasizes the reuse, recycling, remanufacture and repair of goods will create around 6 million new employment opportunities across the world, as such actions replace the traditional model of "extract, make, use and dispose".

Greening with Jobs, International Labour Organisation, World Employment Social Outlook, 2018

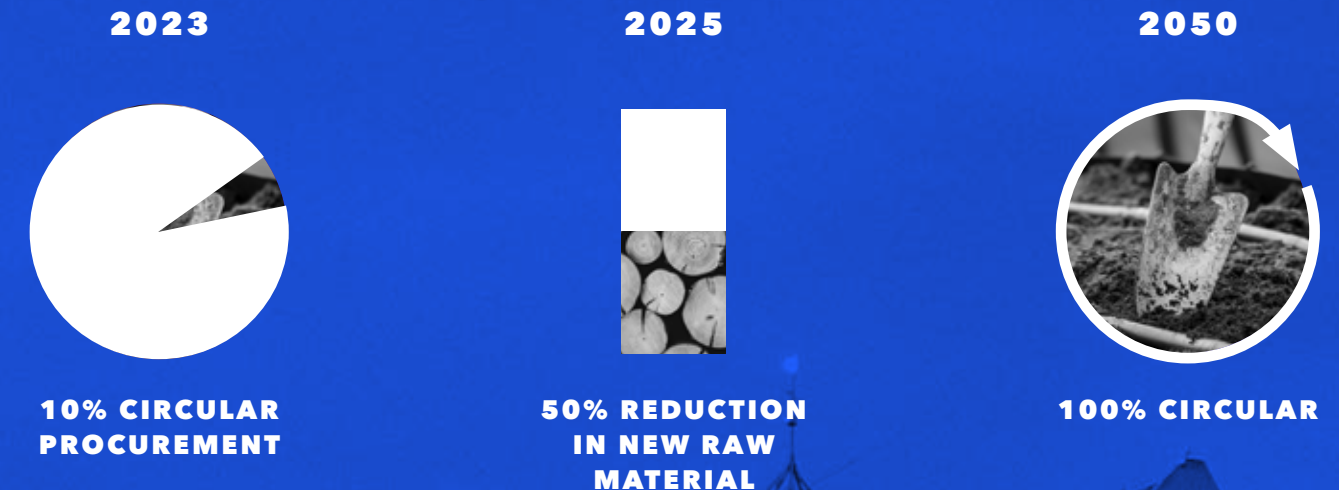
CASE STUDY

AMSTERDAM CITY

Over 3 years, Amsterdam City developed 70 projects around circularity, exploring the economic benefits of going circular and carrying out a comprehensive scan of the city's material flows.



MUNICIPAL COMMITMENTS



From research, procurement, knowledge network development and planning policy, these strategies of reusing materials will increase efficiency in the building sector, with a potential creation value of 85 million euros per year.

Source: *C40 Cities and EIT Climate-KIC and Amsterdam city, 2020*

BUSINESS MODEL REDESIGN

The rationale of how a business delivers value to customers and creates profits in the process is always changing, but more so than ever the drive for this to be underpinned by social and environmental values is thriving.

Businesses who are proactive rather than reactive when crisis hits create a more resilient workplace and ensure that they can weather many storms. The demand for business model changes has been exacerbated by dramatic shifts in the economy as a result of Covid-19. Climate change will continue to place these types of threats on organisations not already transforming the way they do things.

Pivots that factor in mitigating costs due to structural, regulatory, financial and environmental changes, combined with maximising new revenue streams and reduced

employee and infrastructure costs, result in more adaptive and flexible ways of conducting business in the face of any global disruptions.

The sum of these forces create untapped opportunities that benefit the organisation not just in terms of reputation, customer and employee confidence, loyalty and long-term emotional investments, but also in financial resilience and the possibility for growth in new directions.

New job and customer opportunities are created in emerging fields and markets around the world as business models change to meet changing cultural and environmental demands.

Adapting earlier rather than later puts organisations at the forefront of global leadership and reduces the need to catch up to early adopters, as well as positions companies to respond to evolving cultural changes in manageable stages.

Unilever has long been committed to becoming a more sustainable and carbon-positive company. By 2030, 100% of their energy will come from renewable sources, and they will half their greenhouse gas impact of all products across their full lifecycle (ingredients/raw materials, manufacturing, distribution, retail, packaging, consumer use and disposal).

By 2025, they will halve the amount of virgin plastic used in packaging, ensure plastic packaging they do use is designed to be fully reusable, recyclable or compostable, and increase the recycled plastic material content in packaging to 25%. In a pivot from their traditional business models, in 2019 they launched a unique partnership with Terracycle in the US to create Loop, a circular delivery business whereby some of their leading brands are provided in high quality reusable containers. Customers sign up for a delivery service and order what they need on a subscription basis, returning the empty containers after each use through the system that delivered their new products. These are then sterilized, refilled and sent back out to new customers.

Source: Unilever, 2020

Loop, 2020

CASE STUDY

UNILEVER & LOOP

BUSINESS MODEL TRANSFORMATION OPPORTUNITIES



CLOSED LOOP

Creating products within a closed-loop system where products are intentionally intended to be taken back, reconditioned or fed back into the production cycle.



SERVICE MODELS

Reimagining products into service delivery models, building long-term relationships with the customers, creating service provisions to maximise the reuse and shareability.



EXTENDED LIFESPANS

Designing products with extended life spans by providing repair services and maximising likelihood of repair during use phase.



PRODUCER STEWARDSHIP

Transferring ownership so that products are always owned by the producer and thus managed across their entire life.



RESELL

Encouraging the resale/buyback of products, to support the continuation of the functionality and increasing the usable life span.



REMANUFACTURING

Designing products to intentionally use others' byproducts or to ensure that their own byproducts are absorbed into a new system.

IKEA'S ACTION PLAN GOALS

BY 2035

100% RENEWABLE ENERGY / ZERO EMISSIONS FOR DELIVERY SERVICES



BY 2030

100% CIRCULAR AND RENEWABLE ENERGY



CASE STUDY

IKEA

Swedish flat-packed furniture giant IKEA has come out as a forerunner in the circular business transformation, with its 2030 Action Plan. IKEA has developed pilots of different approaches to enable this, such as buy-back programs, in-store resales and changes to the way they source, design and sell their wares. They have introduced vegan food options in their cafes and have conducted deep-dive research into trends around sustainable living and lifestyles to integrate these into their product design.

Source: Ikea Sustainability Report 2019

WORKFORCE CULTURE & ATTITUDES

Workers are changing their perspectives, desires and demands for safety, well-being, flexibility and security, as the workforce is being impacted particularly hard by the Covid-19 crisis.

Often leading the call for action on a wide range of environmental and social issues, workers in a more knowledge-based economy know their value and take action to share their opinions when things don't align with what they see as right.

From changes in the work week structure to locations and styles of work practices, the underlying trend is that individual workers want to work for companies that value them and the planet, as well as profits.

As we move from Baby Boomers being the biggest generation in the workforce to Millennials, we are

seeing a significant shift towards purpose-driven life decisions.

Studies done by Deloitte and McKinsey show that Gen Z and Millennials are deeply concerned about environmental issues such as climate change, and want to work for a company that speaks to these values and also seek them out as customers.

These changes at the individual level are affecting organisational culture, infrastructure and leadership processes. Old ways of managing are fading out, whilst new modes of working are lighting up.

We are seeing challenges to old hierarchical models where younger workers are demanding ethical frameworks and holding their own employers accountable for their actions. They want to be provided

with the tools to not only do their job, but help make the organisation more sustainable and ethical.

Work is such a crucial part of our personal and cultural identity, purpose and well-being. It is also the lubrication of the economy, but with 77% of greenhouse gas emissions being directly attributed to industrial activities, electricity and transportation in the US, the impact of work on the climate and the wider natural systems we all need to survive is significant. Workers are realising this, which in turn is affecting their attitudes towards their organisations.

Office buildings globally alone account for 28% of energy-related greenhouse gas emissions from all the heating and cooling, ventilation, lights and equipment needed to go about doing business and accommodate working humans. But now this is changing, as more people are working from home and the footprint of office space is shrinking.

The places and ways we engage in work are shifting in response to the

megatrends and emerging forces at play. Physical infrastructure, how we get to work, health and safety concerns, and lifestyle desires of the younger workforce are all affecting the culture and attitudes of the workforce.

As workforces become simultaneously distributed and constantly connected to each other through intranet and messaging services companies will be enabled to hire from a wider talent pool and for workers to have more autonomy over their work life.



76%

of millennials say that environmental ethics are a big or huge concern to them

The Unily Future of Workplace by Censuswide, 2020

VALUE ALIGNED

Workers and customers are shifting their values and seeking out organisations that are value aligned, meeting their ethics and purpose filled expectations. The new generations look for greater work-life balance, flexibility and respect when choosing or staying in a job.

As we move more into a knowledge-based economy, workers know that they are less easily replaceable, and they seek to exert more preferences when it comes to why and how they will work.

Perhaps this will change as a result of the economic disruptions that Covid-19 created, but in specialist jobs, there is even more reliance on worker satisfaction to retain top talent, increasing the need for corporate values and sustainability missions.

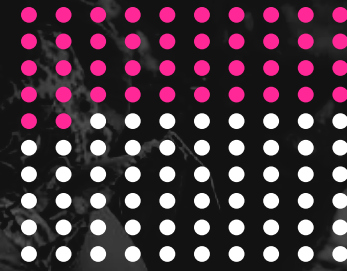
Customers also have a growing interest in the supply chain impacts

and ethical behaviours of the companies they purchase from, favouring companies with social equity and environmental actions as their core policies.

According to the 2020 Global Talent Trends Report, 50% of employees want to work for a company with both a responsible business model and where their health and financial well-being is also protected (49%).

More than one third say they value meaningful work, being motivated by an organisation's values, mission and purpose (37%), with a preference for those who have environmental and social concerns.

Workers look for companies that have purpose that aligns with theirs and that value their employees; similarly, customers seek out companies that represent their values, treat workers well and act as responsible corporate citizens.



42% of millennials say they have begun or expanded a business relationship because of the company's products or services were perceived to have a positive impact on society and/or the environment.

Source: *The Deloitte Global Millennial Survey, 2019*

MILLENNIAL VALUES

Millenials and Gen Zs (born in mid-to-late 1990s) favor companies with positive impact on society and choose those who are aligned with their values, starting and stopping relationships with companies based on very personal reasons. In 2019 Deloitte's Global Millennial Survey, many respondents said they don't hesitate to end a consumer relationship if there was a disagreement with the corporate value, business practices, or even political leanings.

EMPLOYEE VALUES



Respondents 25-44yrs old who would be more likely to work for a company with a strong environmental policy.



Respondents who would "definitely, or possibly" turn down a job offer from a company with a bad environmental record.

The Unily Future of Workplace by Censuswide, 2020

WORKER ACTIVISM

There are increased demands from within the workforce for organisations to be relevant, ethical and aligned with the real-world changes that are occurring, be it responding to Covid-19 health and safety, social equity or climate change.

In certain sectors, employees are setting the agenda rather than the organisation, as culture is shifting towards values and ethics being seen as an equal player in profit and innovation for workers.

This is evidenced through an increase in worker activism on climate action, health and safety issues, social equity and demands for greater corporate responsibility. Groups band together to place collective pressure on their employees to be contributors to their future, and they often win.

In early 2020, Peakon produced the [Employee Expectations Report](#) based on 80 million responses and 14

million survey comments across 160 countries. It explored the workforce's perspectives on the future action from employers and found that 59% of the global workforce is disengaged as of January 2020.

Climate action, flexible worklife, well-being and diversity & inclusion were the four trends identified as the most relevant topics for employees.

This speaks to the deep desires people have for work that makes them feel valued, motivated and safe. When they see a misalignment with this and their employer, they are compelled to take action.

Protests, walkouts, boycotts and open letters are just some of the tools being used by groups of employees who see it as their responsibility to keep their organisations honest and in-touch with the mood and reality of the day.

CASE STUDY

WORKER ACTIVISM

In 2019, 7,700 Amazon employees signed a letter, publicly urging the company to overhaul its climate policy, demanding that CEO Jeff Bezos act on the climate crisis and putting forward a proposal requesting a public report on climate change from Amazon's board of directors. After the proposal failed to pass, employees attempted to confront the CEO, suggesting that Amazon should advance a timeline for reaching a zero emissions goal. The workforce activism of Amazon led the Board to agree that "planning for potential disruptions posed by climate change and reducing company-wide dependence on fossil fuels are important."

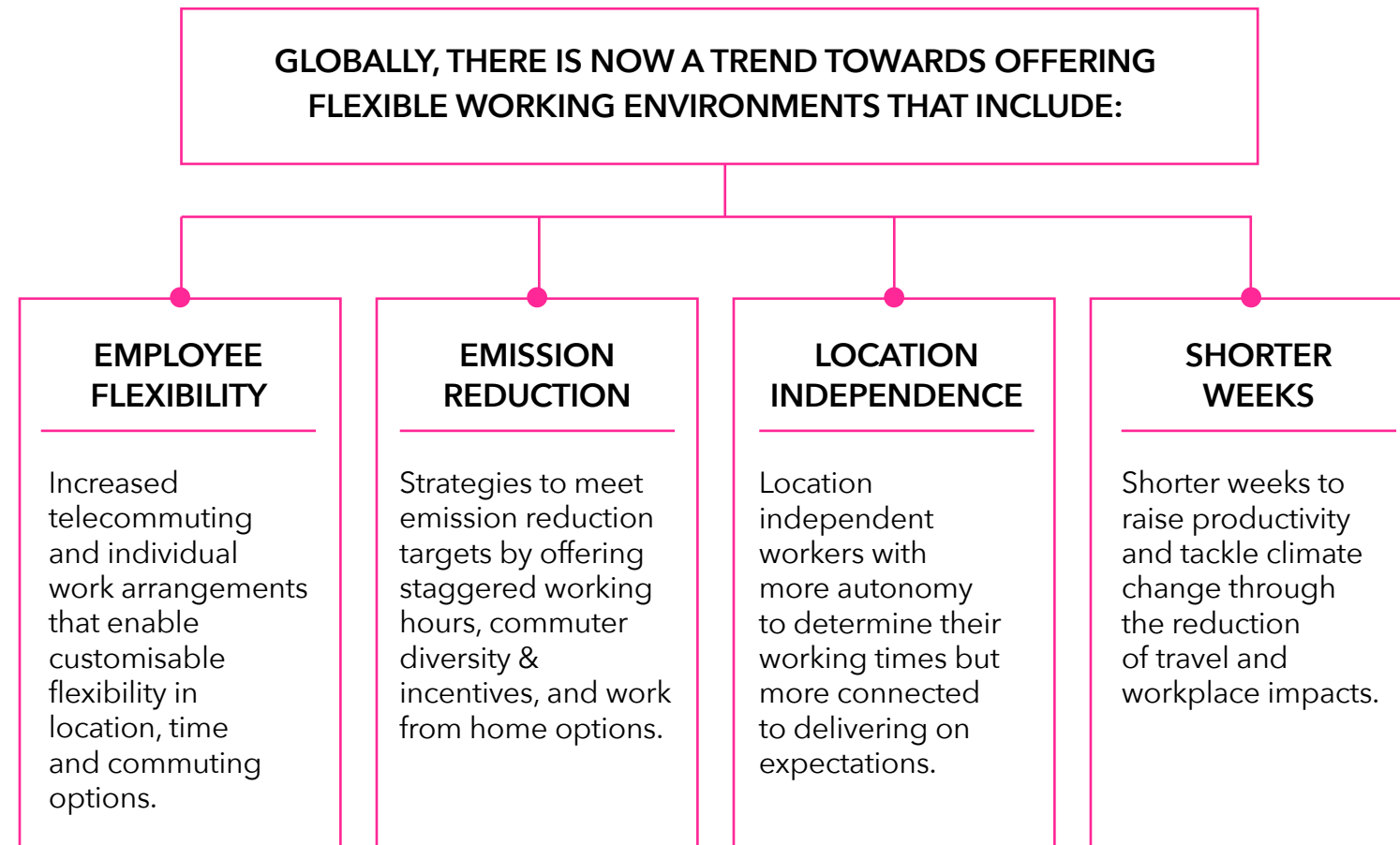
Since then, the company has created "Project Shipment Zero" and now has a long-term goal to power its global infrastructure using 100% renewable energy. This was as a direct result of the actions of thousands of employees demanding action from their employer. They still however have a long way to go to becoming a carbon positive business.

Source: About Amazon, 2019 & The Guardian, 2019

FLEXIBLE WORKLIFE

The demand for more work-life balance and the coinciding rise of telecommunication technologies with Covid-19 has accelerated the shift to diverse work-life scenarios

customised to meet both the employees' and employers needs', save money and offer a safer worklife.



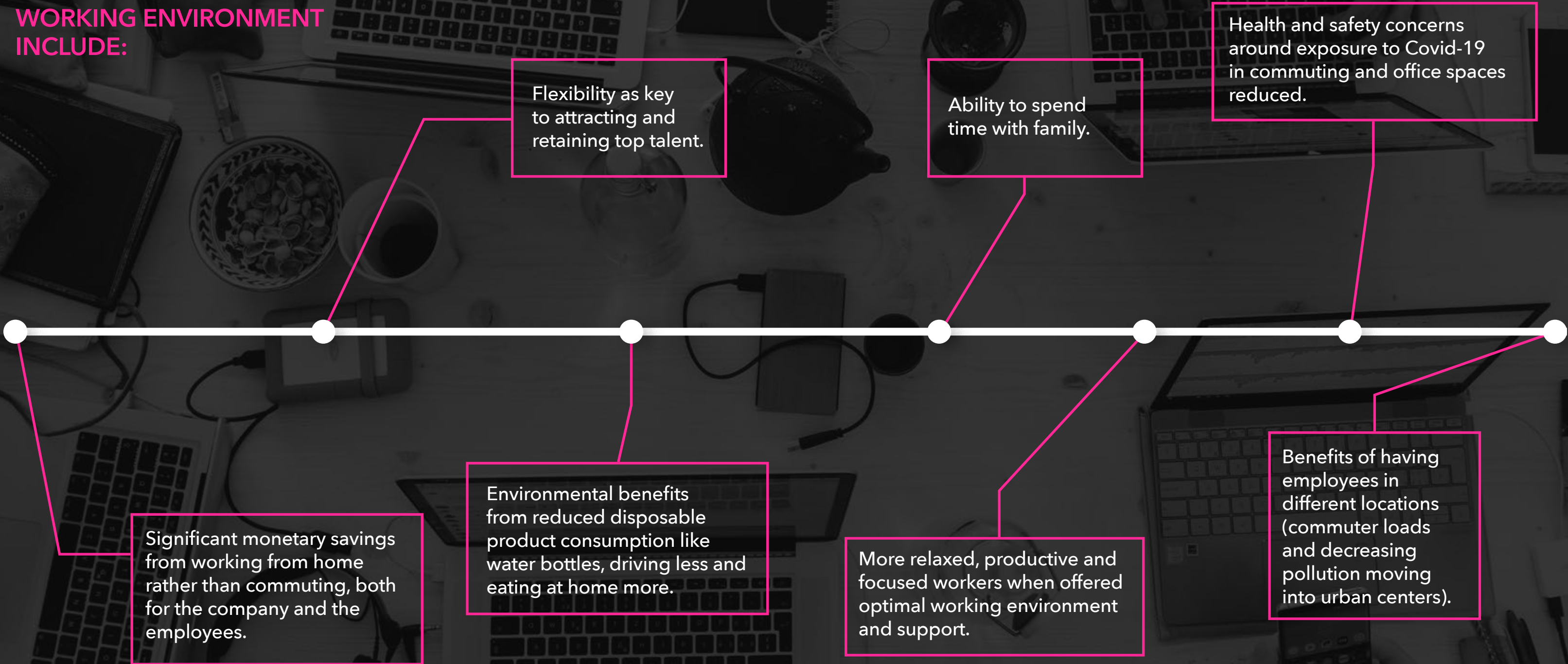
CASE STUDY

MICROSOFT JAPAN

In August 2019, Microsoft Japan closed its offices every Friday as part of the company's "Work-Life Choice Challenge". Reducing the workweek by one day resulted in an unexpected 40% boost in productivity. The trial was part of a summer project that examined work-life balance and aimed to help boost creativity and productivity through working flexible hours. They paid workers for the full 5 days and found that due to the operational cost savings (electricity and printing, for example) and productivity gains, they benefited from the outcomes of the reduced work week.

Source: Business Insider, 2019

BENEFITS OF THE FLEXIBLE WORKING ENVIRONMENT INCLUDE:



GREEN JOBS

As the economy changes, so do the types of jobs offered and skills needed by organisations to be competitive. Roles that encompass the skills, knowledge and capabilities to develop and advance a sustainable and resource-efficient world are on the rise.

Demand for new skill sets that enable companies to stay competitive based on listening to the changing values of consumers, addressing new regulatory environments that Covid-19 and climate change present and dealing with changes to the global economy mean that entirely new roles are evolving.

The European Commission argues that all jobs will eventually become greener because the products and services generated are adapting to meet the EU environmental standards and will demand the transformation and adaptation to a green economy. Whatever we spend money on, jobs

will be created in that industry. This has seen a significant rise in the renewable energy sector, highlighted by roles for Chief Sustainability Officers and Systems Designers who can develop services around reverse logistics for the Circular Economy.

A recent report by the International Labour Organisation (ILO), the World Employment and Social Outlook, shared that a greener economy would create 24 million new jobs globally by 2030 a needed boost given the devastating impact that Covid-19 has had on employment.

The rise in green jobs will continue to create new opportunities that advance in science, technology, engineering and the creative industries help find solutions for new materials, energy efficient systems, communication and behavioural change initiatives, leadership and low-carbon infrastructures.

CASE STUDY

ØRSTED SUSTAINABLE ENERGY

Danish renewable energy company Ørsted was named the most sustainable company in the world by Corporate Knights' Top 100 Assessment in 2020. But just a decade ago, this was not even on the radar for this once-fossil-fuel dependent company, as nearly all its energy production came from oil and gas. At the start of the last decade, just 15% was from renewable energy. In a short time, they fully revised this, and now Ørsted is on track to become carbon neutral by 2025. They announced that they will stop using coal by 2023 and have sold off all their oil and gas business. New roles within the organisation were critical to this transformation, such as their Chief Strategy and Sustainability Officer and green energy experts, engineers and offshore wind operators. Sustainability is now a company-wide integration with the Board of Directors and executive management team enacting their vision "for a world that runs entirely on green energy". They have over 6,000 employees, and their hiring policy focuses on obtaining the best talent who are willing to be at the forefront of change in order to drive green energy innovation.

Source: Ørsted 2020

TOP 10 GREEN JOBS

CHIEF SUSTAINABILITY OFFICER

Senior member of an organisation that is able to provide high-level, strategic, expert management around environmental, social and economic impacts and actions.

RENEWABLE ENERGY EXPERTS

Those who can engineer, advise and manage the way renewable energy systems are set up and operated.

SUSTAINABLE DESIGNERS

Can design closed-loop, resource-reduced products that fit within a circular economy, understand full life cycles, closed-loop business strategies, have a keen sense of customer satisfaction and design for behaviour change.

SUSTAINABLE INVESTMENT ADVISORS

People providing expert financial advice from changing markets in relation to environment, sustainability and governance (ESG) reporting and investments.

SERVICE SYSTEM CUSTOMER SUPPORT

Employees able to provide customer service for take back, return and closed-loop systems as both B2C and B2B.

Managers who can create and manage the end-to-end integrated systems that are part of the circular economy.

Know the full life cycle, manage how products a company produces move through the economy, from production to use and then recapture. Can identify and fix supply chain gaps, support design teams to create closed loop-products and ensure materials are being used to their maximum once being recaptured.

Are able to assess, monitor and manage the operational impacts of a company and report on this publicly and for regulatory requirements.

Can grow or source low-impact food, provide it in package-free systems and ensure that the carbon impact of catering and food delivery is low or zero.

Advanced skills in impact assessment, circular economy principles, green offices, environmental management and general expertise around sustainability methods and initiatives who can advise at all levels of industry to support in decision making and implementation.

REVERSE LOGISTICS MANAGERS

PRODUCT LIFECYCLE MANAGERS

IMPACT ASSESSMENT OFFICERS

LOW IMPACT FOOD ADVISORS

GREEN ADVISORS



TECHNOLOGY & INFRASTRUCTURE

Technology is impacting all aspects of our lives and society at large in significant ways. The workplace is one area where tech-enabled change is being accelerated.

Being able to stay connected without being overwhelmed, finding productivity enhancers, 'water-cooler' down-time moments and building trust between teams are all the challenges of remote and distributed workforces.

Those who were more prepared were quickly able to efficiently adapt to the changes to worklife brought about by the Covid-19 crisis, whilst unprepared companies are still trying to adjust to this new technology-enabled way of working.

The more integrated we make the systems, the more effective organisations can be at adopting the business and cultural changes needed to embrace sustainability.

Technology can enable rapid feedback of data that facilitates real-time changes, such as reduced energy use, supply chain issues or behavioural changes, but there are still many gaps to fill and questions to be answered over the coming decade around the impacts of AI and the benefits or losses associated with automation.

One thing is for sure: technology is a great enabler of sustainability, as it allows for efficiency gains and new, cleaner ways of doing things.

Technology empowers organisations to reconfigure the way they work. Being location independent affects the size and form of the physical environments that companies design and maintain for their workforce for example. Technology does, however, have a physical element to it. The internet and cloud services require energy and infrastructure. Thus there is much movement towards massively

reducing the carbon load of increased internet usage. The impact of this area of technology can not be underestimated when looking at the ways to be carbon positive.

The physical environment we work within affects productivity, cognitive ability and general worker morale. This is driving a design revolution around physical infrastructure being more conducive to worker health and well-being, encouraging diversity of work environments and reducing the overall footprint of office spaces.

There has been a big push over the last two decades to incorporate sustainable design principles to help manage the environmental footprint of office buildings, which also creates a more effective experience for the workers within it.

Buildings often consume upwards of a staggering 40% of all electricity with the predictions being that by 2025, unless changes are made, the largest greenhouse gas emitting sector on the planet will be from building operations. In the US, 38% of greenhouse gas emissions are produced by buildings.

Trends are pointing towards much smaller footprints of buildings physically and ecologically, as the workforce adopts diverse practices of remote working and companies start to adopt carbon-positive business practices.

The shape, size and layout of workplaces will continue to change dramatically, with one key trend being driven by the Covid-19 disruptions: no more open plan, way more ventilation and definitely less people in the office at the same time.

New ways of collaborating and working as teams are emerging as we adapt to this new socially-distanced way of communicating and working.

DIGITAL TRANSFORMATION

The workforce is becoming more mobile. Digital technology and innovation, the internet of things, automation, AI, distributed workforces - these all have the potential to radically increase efficiency, change work practices and enable new business models across all sectors.

Digital transformation is constantly evolving allowing new technological capabilities, challenging us as a society to consider the ethics and opportunities of each new advancement to ensure that the outcomes are collectively beneficial.

If it were not for the communication systems already developed, the transition to working from home would have been far less effective during the lockdowns that were necessary to suspend the impacts of Covid-19. This can be said, in part, for the changes needed to address climate change and create sustainable workplaces: technology

is a critical part of the ecosystem that enables us to transition to a low-carbon economy and provide the services that support businesses in adjusting their operational systems.

However, one of the biggest impacts of a building's operations is the heating, ventilation, and air-conditioning (HVAC) contributing to the majority of carbon emissions. This is one area where machine learning technology can help reduce the energy demands of HVAC systems. The introduction of well-designed smart devices with internet connectivity can provide the type of feedback on operational energy and space use information in real-time needed for office managers to ensure that energy savings are maximised and the office is a safe place to work.

Covid-19 has accelerated the growing trend for reduced office spaces, with the global footprint dramatically reducing as the ways we work shift to more distributed

and flexible. This is increasing the demand for highly effective connected communication systems, and fueling the development of new ways of collaborating.

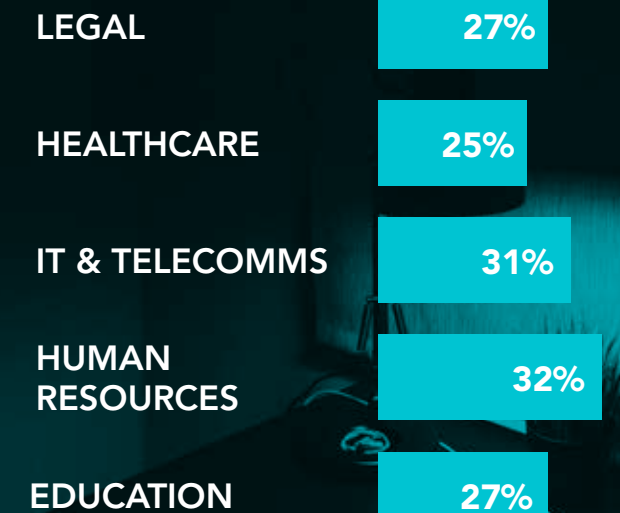
Sustainability requires a cultural shift from the old way of doing things evolving into new ways of operating, communicating and delivering goods and services into the economy. So, the employee experience around these shifts will benefit from technological services that enable the feedback and information that support a seamless transformation.

Additionally, the advancement of alternative energy systems and battery storage have enabled a rapid rise in solar and wind technology as fiscally comparable to fossil fuels. Technology is powering the transition to circular business models that create post disposable service offerings by enabling reverse logistics to be efficiently managed.

However there is the downside to this rapid increase in technological reliance, the internet is physical as data centers require significant amounts of energy to power the

increased use, serve centers are being coupled with heating systems in colder climate countries to heat buildings. This type of symbiotic coupling of resources is also enabled by effective technological transformations.

Industry specific respondents who think advancements in technology will have the most impact on the way they work after Covid-19



The Unily Future of Workplace by Censuswide, 2020

WORK LESS BUT BETTER

As technology and science advance, we rapidly uncover new ways of working that provide more productivity through efficiency gains, empowering a more effective work-life balance.

By working better, but less, we can reduce the impact of many aspects of workplace activities, from the size of offices to worker transport and energy use.

Studies show that there are significant productivity gains that can be achieved through workers having more rest time; the 4-day work week or flexible working hours can be enabled through the efficiency gains that new technology provides.

The key to ensuring this is not exploitative is by also not increasing the demand for output. This concept is called degrowth, or stable growth scenarios, whereby outputs are maintained but the impact of doing so across all metrics are reduced.

Responsible Technology Policies play an important role in ensuring that organisations don't use technology to exploit workers, customers or the environment.

By acknowledging the social and environmental impacts arising from the adoption of new technology in supply chains, operations and the workforce, companies can design strategies to create clean and circular data centers, build effective digital skills in society, adopt technology to create a low carbon economy, promote equality in technology roles, support digital dieting and detox as well as highlight the potential pitfalls of technology to ensure that it is used as a source for societal good.

CASE STUDY

UNILY

Effective, attractive and timely communication within teams and organisations as a whole is critical to enabling employees to work more flexibly, be it from home, remote offices, on the road or in any number of non traditional ways.

Unily set about developing a highly effective workplace communication intranet that would allow for a centralised hub, quick and delightful user experience and seamless productivity. Companies that had already implemented their cloud based internal communication systems were able to more effectively convert to at home work during the Covid-19 crisis, offering personalised employee experience during a complex time.

Source: [Unily.com](https://www.unily.com), 2020

LIVING BUILDINGS

Humans operate more effectively when in spaces that reference nature, offer lights, air and space. There are many known health and cognitive benefits from creating spaces that offer a closer connection to nature, by designing living buildings offices can transform into highly desirable and effective paces of productivity.

Workplaces are now needing to be redesigned to the increased ventilation and indoor health due to Covid-19. This is presenting the opportunity for these types of living design changes to be incorporated into office buildings as they simultaneously change the interior spaces to facilitate the new ways of working.

Places of work that are designed as complex interconnected and adaptive systems can respond to crises with ease and allow for dynamic shifts in the operating environment for organisations. This ecosystem mindset will enable

buildings and workplace practices to be regenerative, offering back more from the system than they take.

Bringing living things into our built world enables more human-centric spaces that save energy, respect materials and create better working environments. There are many certification systems for ensuring the health and well-being of the building occupations such as the WELL standard, and the energy efficiency of the building operations (Leadership in Energy and Environmental Design: LEED). These frameworks provide the guidelines for improving health and human experience through design.

Some of the known benefits of buildings designed in this way include reduced employee absenteeism, improved mood, health, stress and mental fatigue, along with increased productivity and employee engagement.

The building sector is responsible for over one-third of the global energy consumption and nearly 40% of total direct and indirect CO2 emissions.

As such, smart, nature-inspired design as a solution for workplace sustainability includes shifting to renewable energy and energy-positive design. This includes maximising natural light and airflow, implementing solar passive design and incorporating features that enhance performance and well-being for the workforce.

The future HQ will be not only a healthy and sustainable space, it will be adaptive and responsive, collaborative and cognitively inspiring, as more work is done at home, the HQ will transform into a hub for decisions, connection and representation of the business ethos as a whole.

INTERFACE FLOOR HQ

Interface's new HQ in Atlanta called Basecamp is a green-scape enhanced biophilic building. Modeling nature is a major driver of the Interface success story; having transformed from a polluting waste-based product to a fully sustainable and circular one, they set about ensuring that their HQ was also connected to their company's mission to be sustainable and respectful of nature. They ensured that the building created a space that is people-focused and gives workers what they need throughout the day: light, nature, nourishment and space. To reduce carbon impacts, an existing building was selected to do an adaptive reuse, incorporating sustainable and natural design features throughout, harvesting rainwater from the rooftop, maximising natural light and air flows to reduce energy and offering a rooftop nature escape for workers.

Source: Interface Floor, 2019

POST DISPOSABLE

Adopting circular design strategies to ensure that the full life cycle of products are created to be sustainable, climate positive and socially beneficial can be achieved through the aspiration of being post disposable, in which materials are valued and systems are designed to capture and reuse those that can't be maintained.

Many companies are already well into their zero-waste journey, designing products to be reclaimed, recycled, remanufactured and resold, helping us move from a hyper-disposable culture to one that is post disposable by design.

This involves considering all the inputs and outputs from workplaces and production processes, along with considering procurement choices and the waste management processes within the business ecosystem.

This will involve the development of new reusable closed-loop systems for all sorts of currently disposable items, like coffee cups, office paper, food containers, face masks and packaging.

Services will emerge that enable the easy adaptation to this for all types of industries by providing a higher quality experience for the customer and reducing costs for the company through better, more efficient material design.

A critical part of the transition to the circular economy is the reconfiguration away from disposability to reusability and increased material values.

Business processes will be redesigned with changes to the production processes and the evolution of more efficient ways to produce output and create value for the customer.

DELL'S CIRCULAR STRATEGY GOALS

RECYCLED PACKAGING & RENEWABLE ENERGY



CASE STUDY

DELL'S 2030 GOALS

Technology company Dell is committed to designing waste out of their supply chain, manufacturing and operations. They have developed a circular design approach that involves considering sustainability across the entire life cycle of their products. They have designed and operate global take-back programs, as well as repair and resale services. They strive to achieve zero-waste by incorporating post disposable design approaches into every stage of their product production process, with on average, 90% of a Dell laptop being recycled already. Dell's Global Climate Policy Principles highlight technology as key component of addressing climate change, through a wide range of innovative products, services, and solutions.

Source: Dell's 2030 Goals, 2019

THE DIAGNOSTIC TOOLKIT

This toolkit has been designed to help you assess your current sustainability and climate-positive journey so that you can take action. It helps establish where you are right now, supports your sustainability journey towards getting started or progressing further, and helps frame a strategy you can employ to enhance your sustainability and climate-positive journey within your organisation.

HOW TO

STEP 1
QUESTIONS Respond to the eight quick questions on the next page to calculate your score

STEP 2
DIAGNOSIS Use your score to diagnose where you are at currently on your sustainability journey

STEP 3
ACTION Review the actions and consider your options for enhancing your sustainability journey

HOW FAR AHEAD ARE YOU?

ASSESS THE STAGE YOU'RE AT, AND WHERE YOU CAN GO NEXT



STARTING OUT

Everyone has to start somewhere. You are clearly ready and willing to start the journey, but perhaps need some strategic starting points that will ensure you get off to a good start.



MAKING PROGRESS

You have taken some actions. They have given you data and information, and you have leapt over the initial hurdle of starting the journey.



GETTING IT DONE

This is a great place to be! Congratulations on getting to this advanced level in your journey!



LEADING THE WAY

Great work! You are leading the way and demonstrating just how committed you are to being a 100% sustainable, climate-positive player in your industry.

QUESTIONS

1	Select the statement that best applies to your organisation's understanding and commitment to sustainability
A	We are 100% committed to sustainability across our entire organisation.
B	Not many people know what it is, but there have been some conversations about getting started in some way.
C	Many people in our organisation understand what sustainability is, and we have started to take action.
D	Some conversations and actions have started, but we still have a long way to go.

2	If asked, everyone in our organisation would agree that:
A	Environmental and social issues are important to us as an organisation, but not yet fully integrated into our DNA.
B	Profits are still the most important thing to us; social and environmental impacts are always second to achieving our KPIs.
C	Sustainability is in our DNA and is a driving force in all our business decisions.
D	We are committed to climate action and know we still have work to do in getting it integrated across our business.

3	Our organisation is actively doing the following:
A	Recycling all our waste and/or offering onsite composting and/or actively reducing produced waste.
B	Regularly assessing our carbon footprint and/or purchasing renewable energy.
C	Understanding the ecological impacts of our supply chain and making strong efforts to reduce these, plus purchasing from sustainable suppliers.
D	All of the above

4	Compared to other companies in our industry, our sustainability and climate actions are:
A	Doing okay, we are on par with some and behind others.
B	Leading the way and outperforming all others.
C	Underperforming.
D	Doing really well, we know we are ahead of many others.

5	We have done or plan on doing the following:
A	Implemented ambitious environmental policies, trained staff and implemented changes that have reduced our climate and environmental impacts.
B	Provided basic training to staff on sustainability and climate change.
C	Done a life cycle assessment of our products or supply chain and taken action to change the design to be more sustainable.
D	Created environmental policies that help to guide the organisation into sustainability.

6	If we asked our customers, they would say the following of our sustainability performance:
A	They would be vague as to what we are doing but hope we were doing something.
B	They would not know what we are talking about.
C	They would be proud of all of our achievements and know our strong commitment.
D	They would know that we are committed and taking action.

7	Annually, our company reports on the following:
A	Our financial returns with some social impact activities.
B	On the goal we have to do better when it comes to climate change, social equity and environmental performance.
C	Our corporate social responsibility on all levels.
D	On our performance against our mission to be 100% circular and sustainable.

8	Moving forward, our organisation wants to:
A	Learn how to do better, take action and get sustainability on the agenda.
B	Be a global leader in climate-positive action, circular economy and sustainability.
C	Find out what our impacts are, engage our staff and embark on a sustainability journey.
D	Go further, adopt more progressive changes, fill our knowledge gap and ensure that sustainability becomes part of our organisation's DNA.

POINTS CALCULATION

Calculate your score out of 32 and check where you are on the sustainability scale.

Any questions you can't respond to: 0

Q1	A: 4 B: 1 C: 3 D: 2	Q2	A: 2 B: 1 C: 4 D: 3	Q3	A: 1 B: 2 C: 3 D: 4	Q4	A: 2 B: 4 C: 1 D: 3	Q5	A: 4 B: 1 C: 3 D: 2	Q6	A: 2 B: 1 C: 4 D: 3	Q7	A: 1 B: 2 C: 3 D: 4	Q8	A: 2 B: 4 C: 1 D: 3
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0-8 POINTS STARTING OUT

Everyone has to start somewhere.

You are clearly ready and willing to start the journey, but perhaps need some strategic starting points that will ensure you get off to a good start.

Leadership takes courage, and the first step is always identifying what deficits you have so you can design solutions to overcome them.

Then, by building the internal capacity to make positive change, you can adopt a step-by-step approach to make sure you don't get left behind as others lead the way in climate-positive action.

9-16 POINTS MAKING PROGRESS

You have taken some actions.

They have given you data and information and leapt over the initial hurdle of starting the journey.

Perhaps you are even now picking up momentum, as you know that change is important and that it has to happen. But you also know that you need to improve your game.

In particular, you need to establish your team's cohesion to the new path and to develop the internal capacity to take steps now that will reap the rewards of a climate-positive business in the future.

17-24 POINTS GETTING IT DONE

This is a great place to be!

Congratulations on getting to this advanced level in your journey!

You are well ahead of many of your competitors and established on the path towards the Circular Economy.

You have taken action, started your internal transitions and training and made sure your workforce and customers know what you are doing.

Wherever there are gaps in your knowledge and strategy, you are working hard to fill them so that you can transition to the next level and be a leader in your industry.

25-32 POINTS LEADING THE WAY

Great work!

You are leading the way and demonstrating just how committed you are to being a 100% sustainable, climate-positive player in your industry.

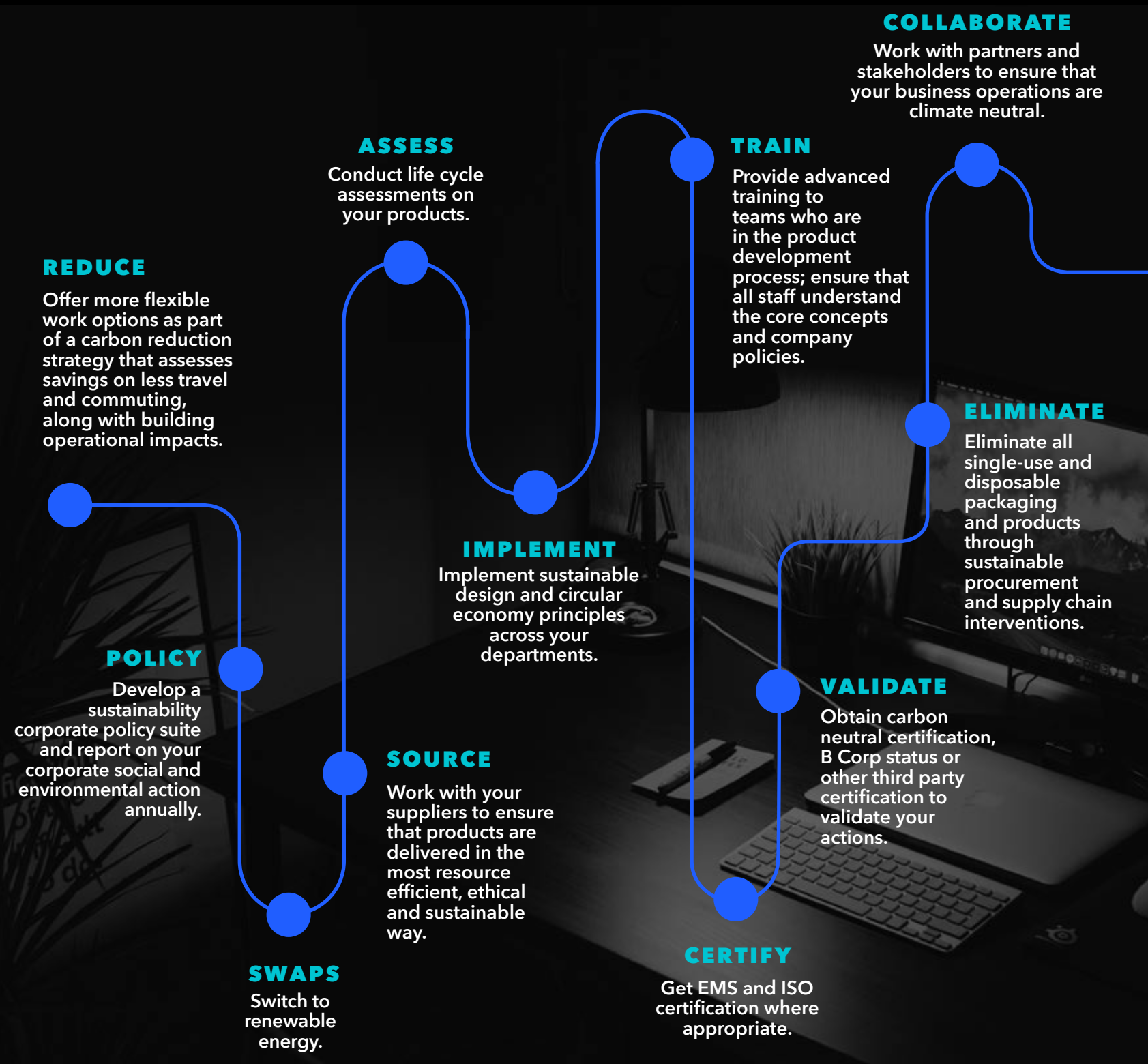
This must feel amazing to see that nearly everyone in your organisation is activated, purpose-filled and passionately helping to drive this change. You see the fiscal and social benefits of having a dedicated workforce and executive leadership with an incredible knowledge base.

You are making sure that your people are on board, motivated and equipped with the tools and resources they need and that your organisation's missions and actions are aligned with the sustainability journey you have embarked upon.

ACTIONS FOR STARTING OUT



ACTIONS FOR MAKING PROGRESS



ACTIONS FOR GETTING IT DONE

Offer shorter workweeks with different incentive measures to maintain productivity.

INCENTIVES

Develop policies and strategies that enable change across your organisation.

DEVELOP

Design buildings to be biophilic and carbon positive.

DESIGN

Connect all your actions to science-based targets and measurements.

CONNECT

Set up carbon emissions reduction targets, supporting climate policies targeting net-zero emissions by 2030.

REDUCE

INVEST

Invest in sustainable technology, such as renewable energy, information systems, telework platforms, performance measuring, smart buildings.

MEASURE

Use life cycle assessment and systems thinking as foundations for decision making.

POLICY

Develop ambitious policies that will ensure you are leading the way.

ALIGN

Align your company with the Paris Agreement and all the SDGs.

UNITE

Speak up in support of climate action and social equity, and embed sustainability into your DNA through the corporate business strategy/goals and mission.

ACTIONS FOR LEADING THE WAY

REGENERATE

Go beyond zero emissions and find ways to be regenerative by giving back more than you take.

NEW MODELS

Implement and lead advanced take back, repair and product service system models.

DESIGN

Eliminate all waste and design for post disposability across your entire value chain.

LEADERS

VOCALISE

Be a leading advocate for climate-positive action in business.

STEWARDSHIP

Create a full take back stewardship program on all products.

SHARE

Share your knowledge and success.

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