



Office segment – transformation or adaptation

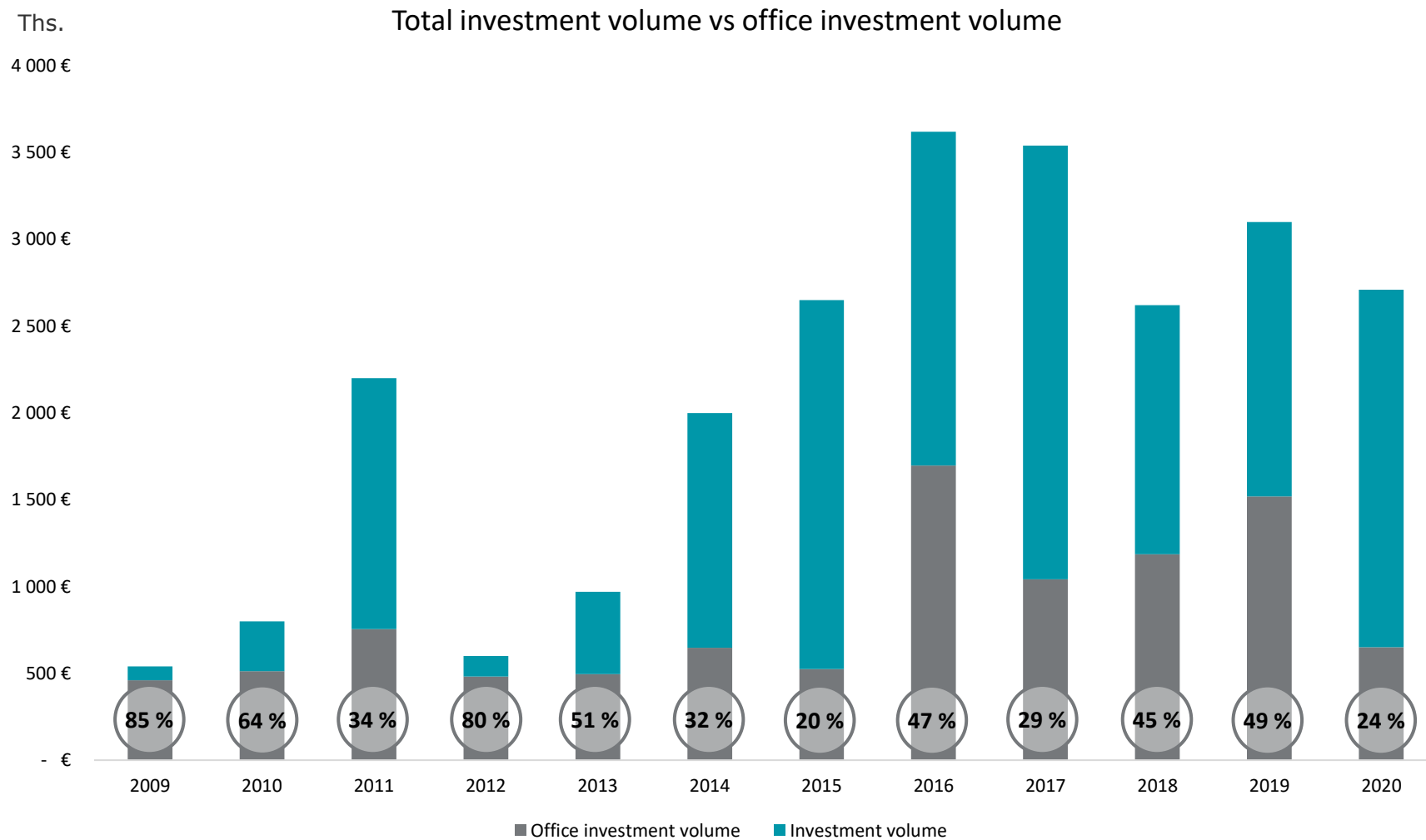
Ondřej Zabloudil

18. 03. 2021

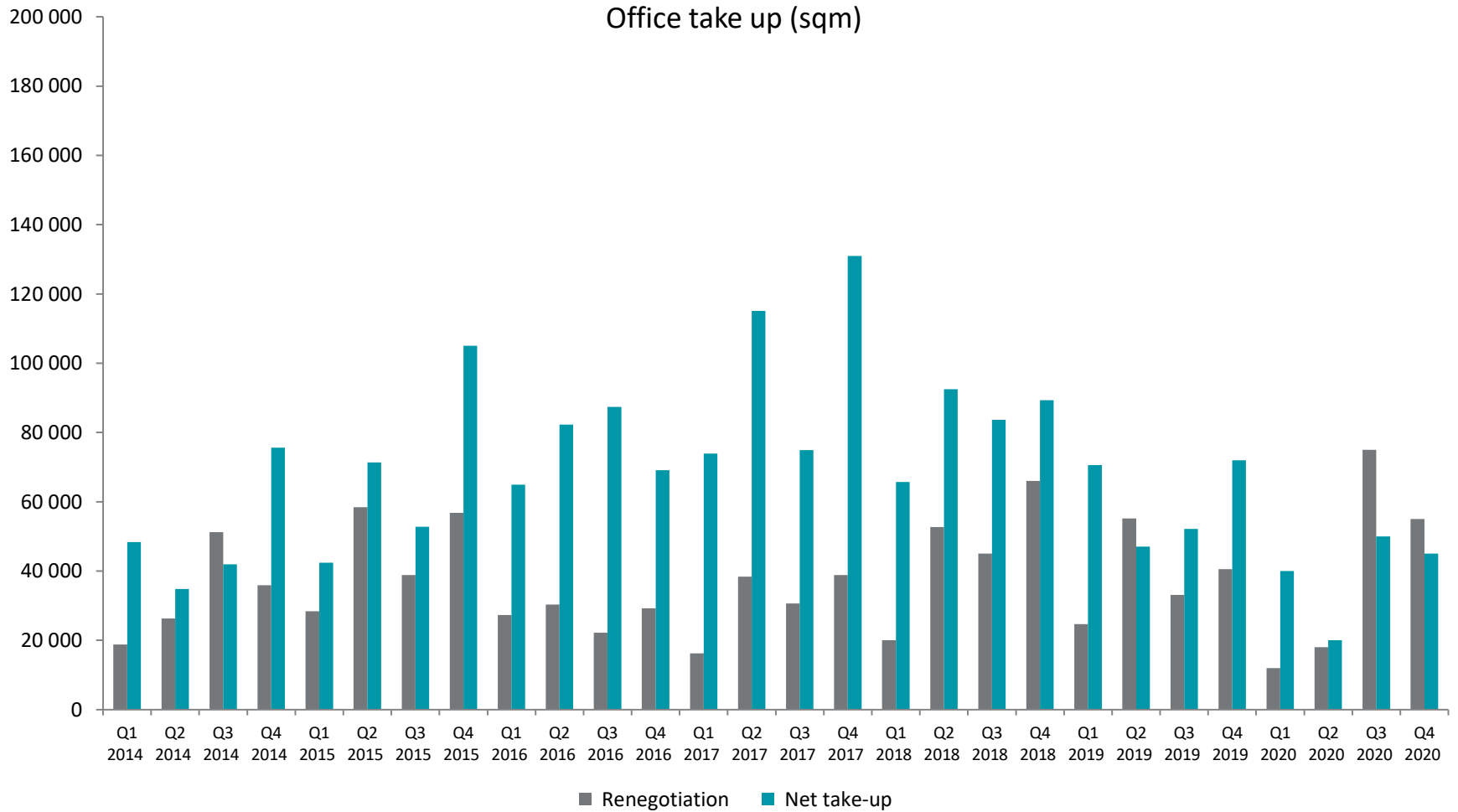


Office segment overview

Investment activity

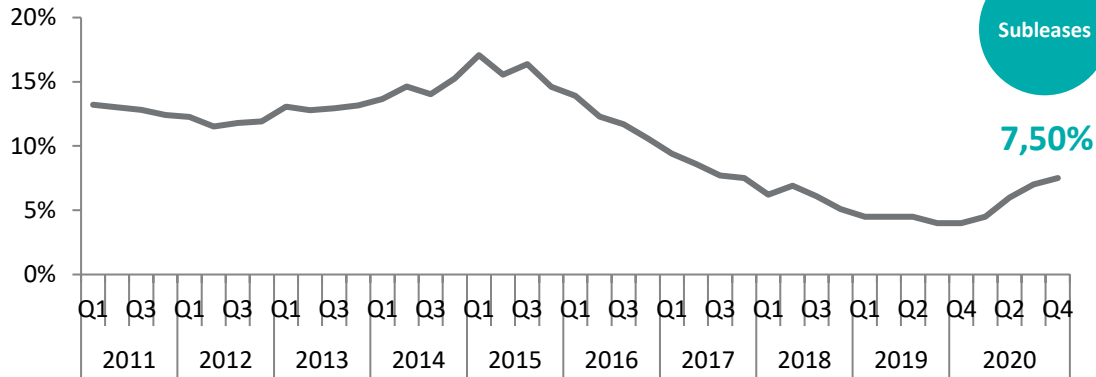


Office premises demand



Office market supply

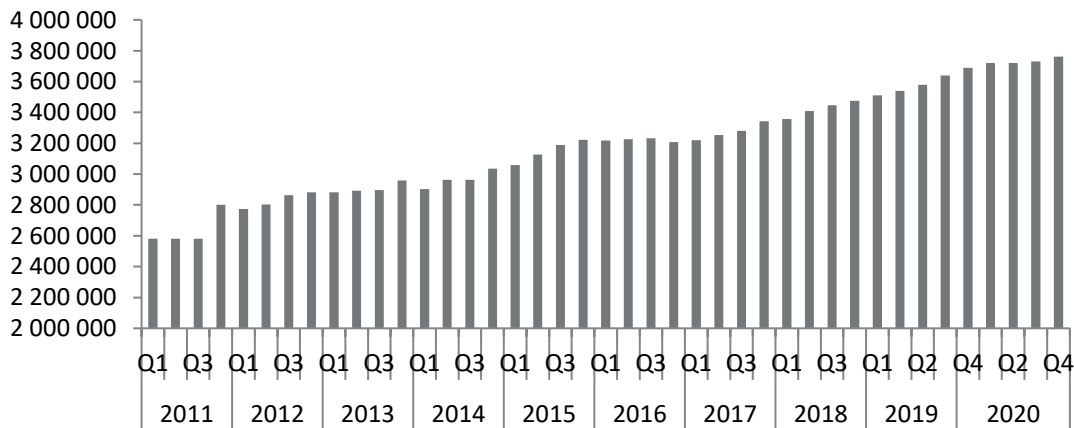
Office vacancy (%)



2020 vacancy



Total office stock (sqm)



New office building construction



Prague mobility

5. 6. 2020

Transit stations

-22% compared to baseline



Workplaces

-27% compared to baseline



Residential

+5% compared to baseline



9. 3. 2021

Transit stations

-51% compared to baseline



Workplaces

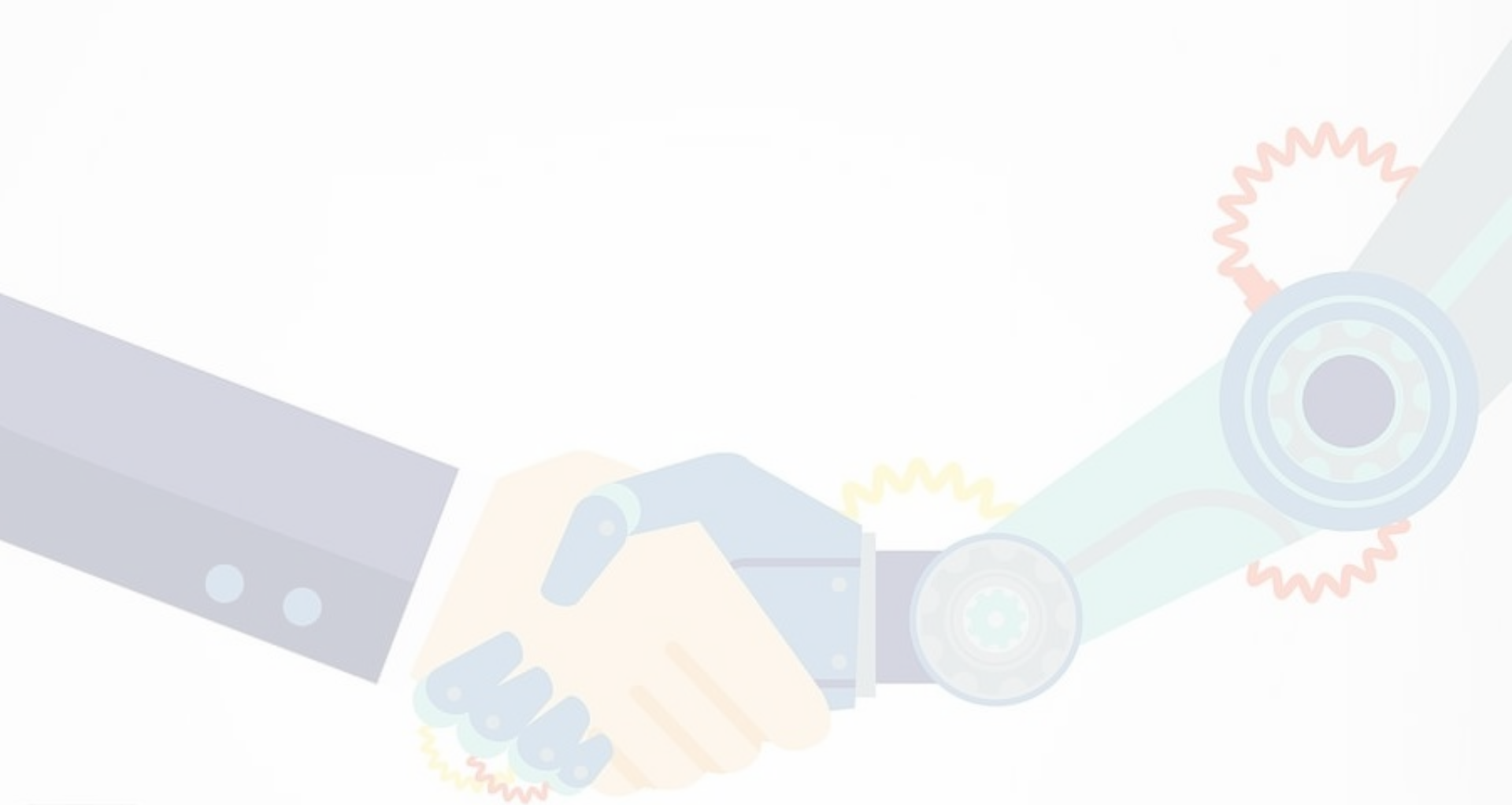
-47% compared to baseline



Residential

+21% compared to baseline

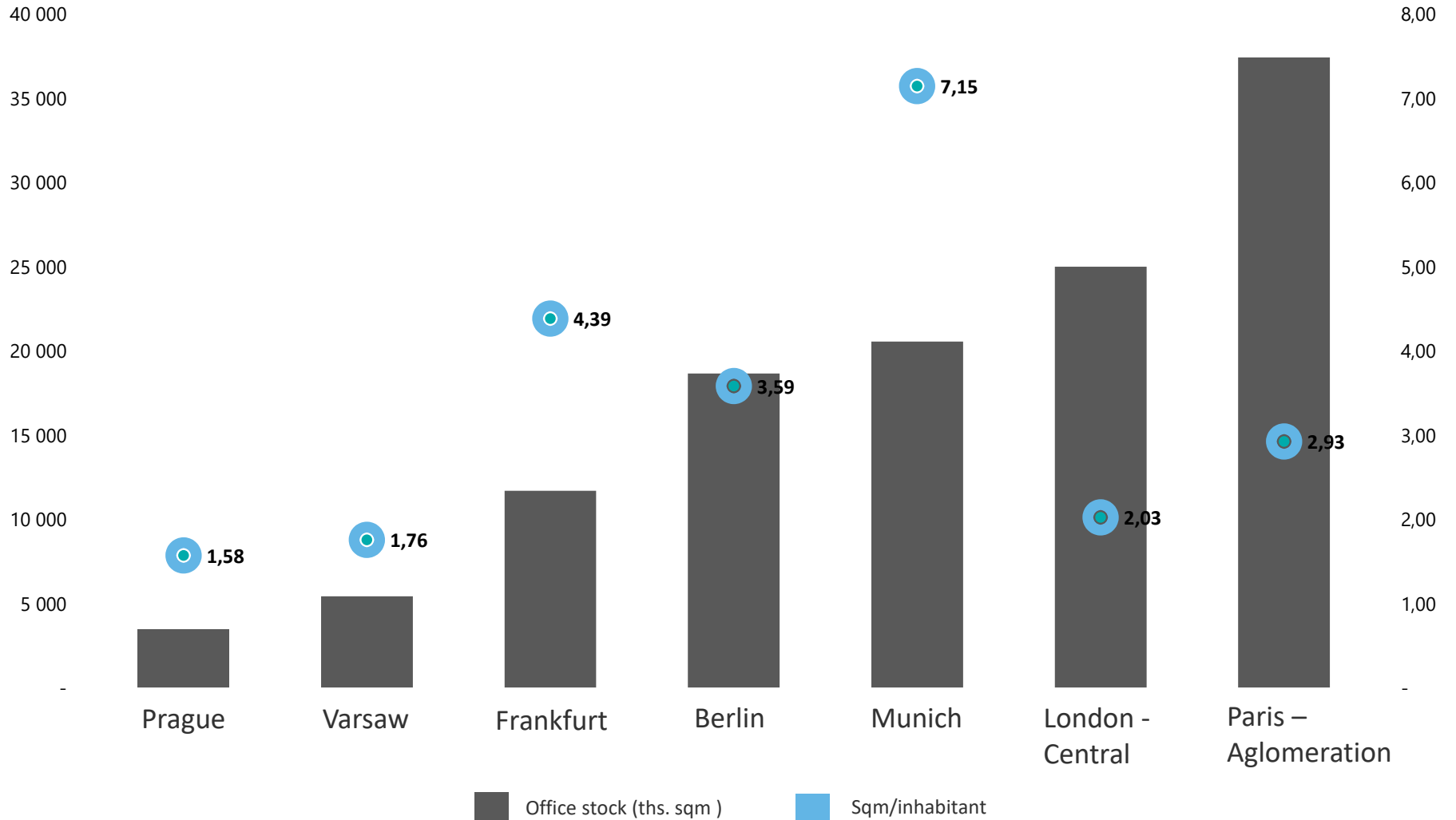




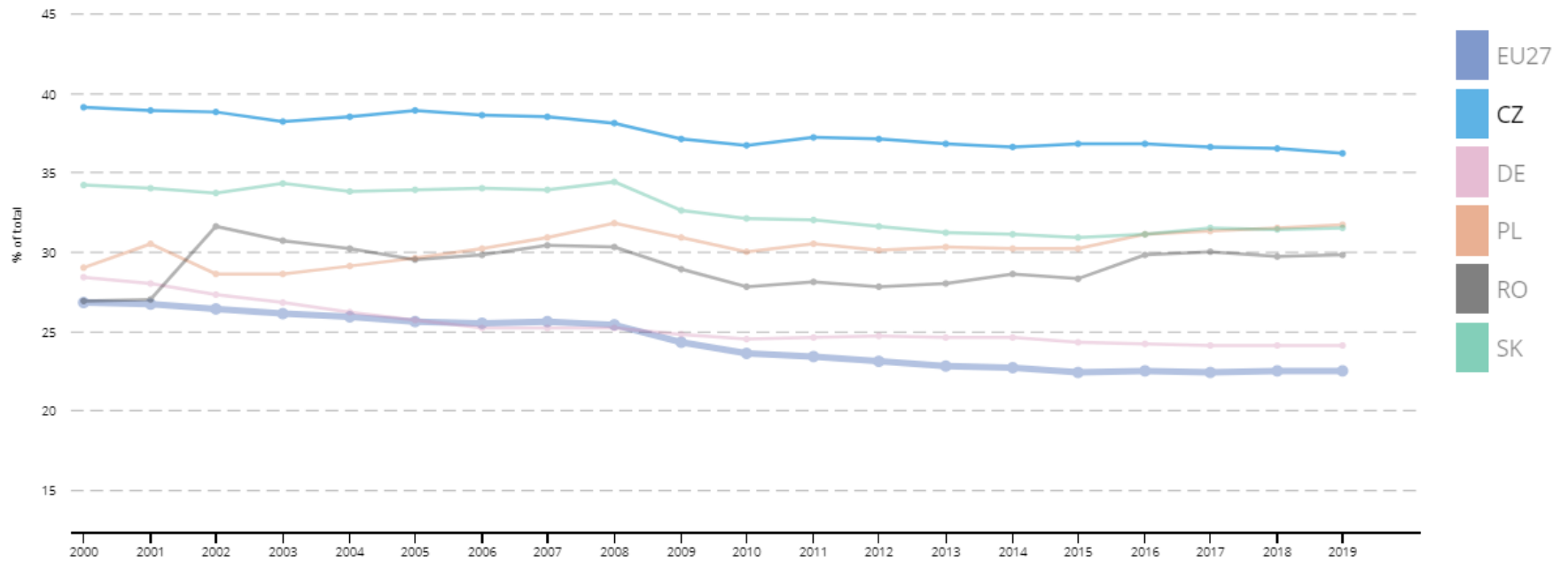
Workforce perspective

Office stock in Europe

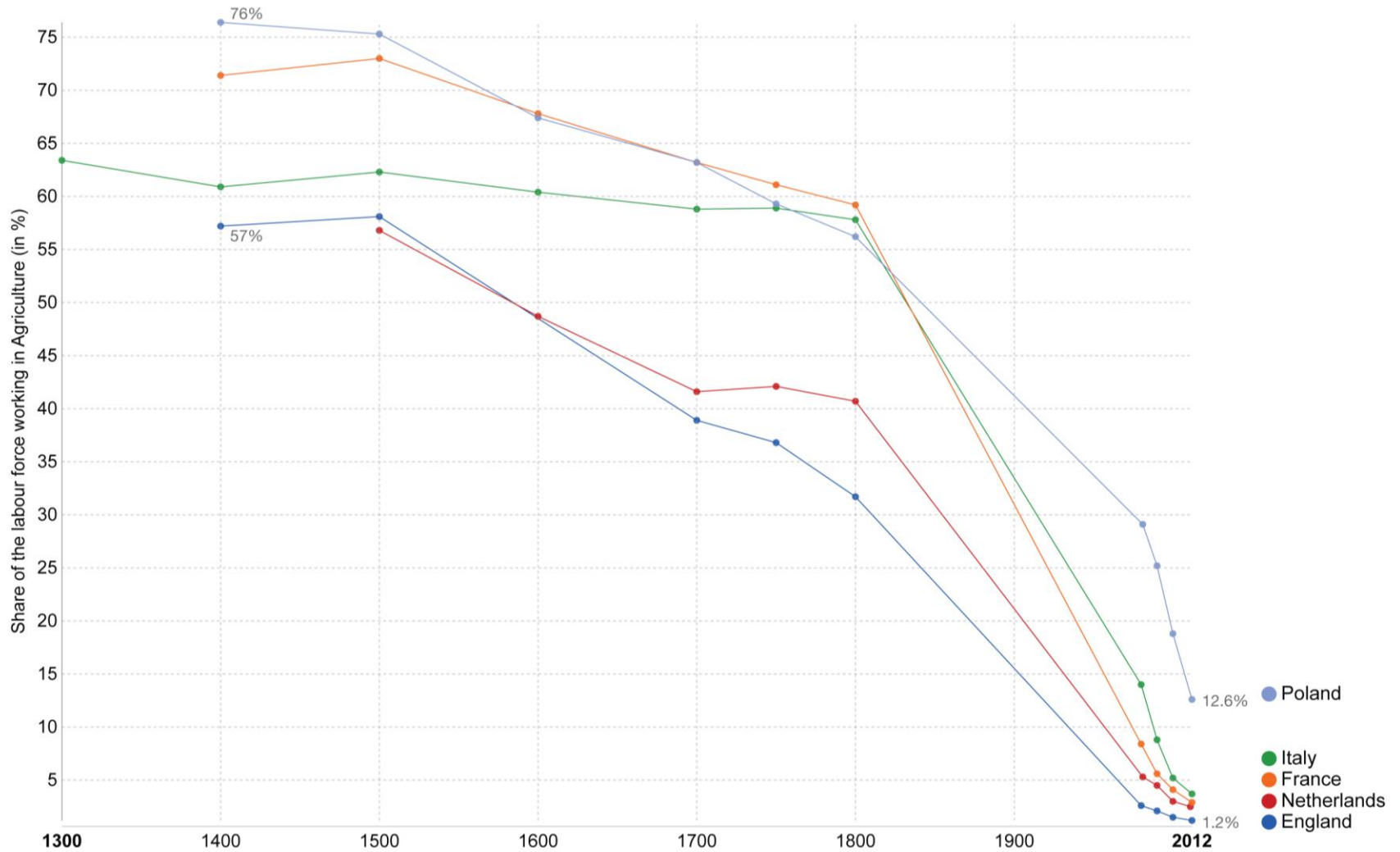
Office stock in selected cities and ratio of office density



Employment in industry in selected EU countries



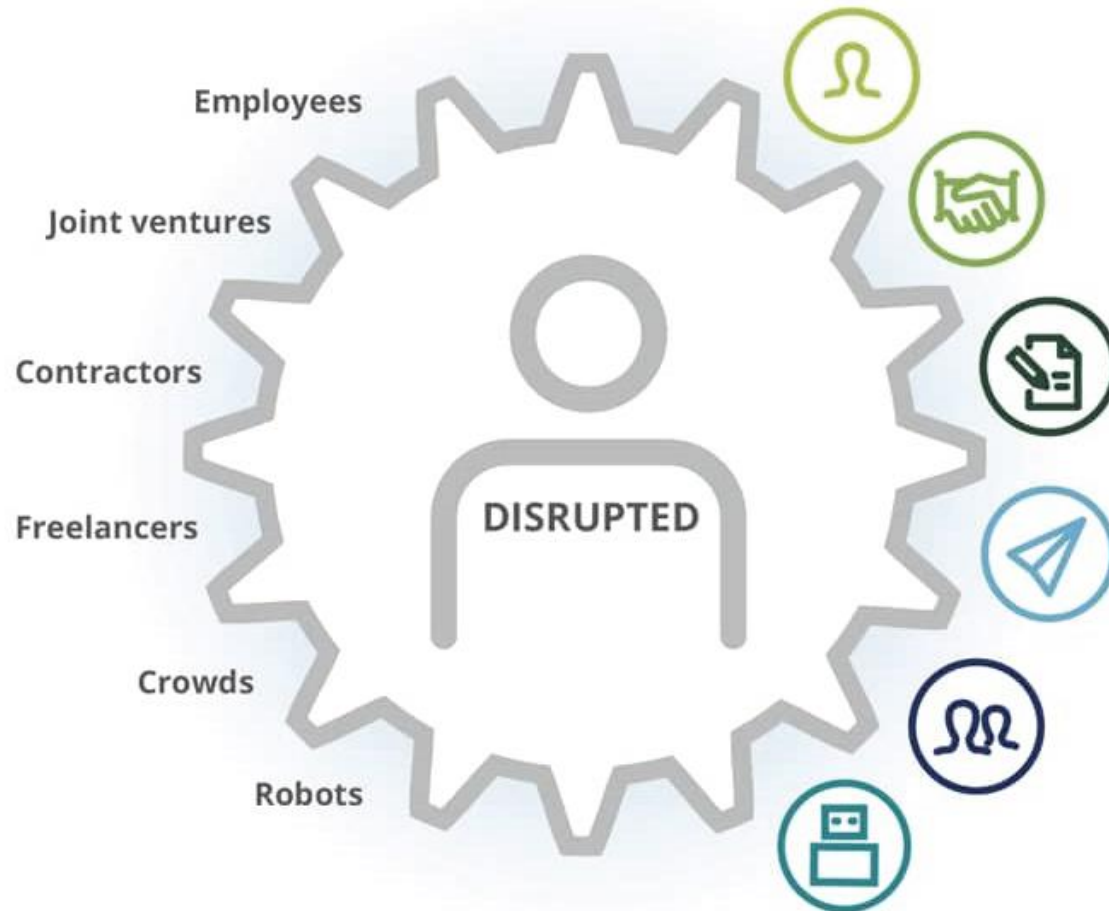
Share of the labor force working in agriculture, by Max Roser, Our world in data



Data source: Pre 1800 is from Allen (2000), "Economic Structure and Agricultural Productivity in Europe, 1300-1800". Newer data from the World Bank. The interactive data visualization is available at OurWorldinData.org. There you find the raw data and more visualizations on this topic.

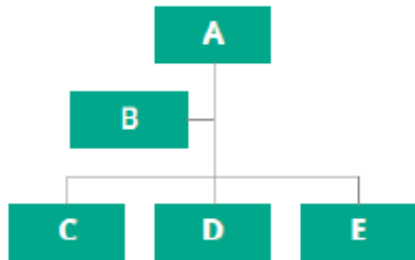
Licensed under CC-BY-NC-SA by the author Max Roser.

The alternative workforce is rising



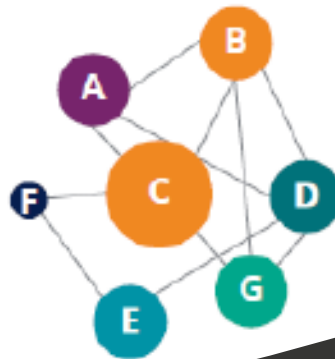
Corporate structure focuses to team aspect

How it used to be



- The goal was efficiency and effectiveness.
- Hierarchy structure, decision making and leadership in the hands of leadership.
- Process based.

How is it now



- Ongoing redesign of the existing organization.
- Transition to agile methods.
- Structure based on functions and projects.

Future



- Education, innovation and customer impact are preferred.
- Cooperation and knowledge sharing are essential.

Share of part time employment

| | | 2000 | 2005 | 2010 | 2015 | 2016 | 2017 | 2018 | 2019 |
|-----------------|------------|------|------|------|------|------|------|------|------|
| Country | Sex | | | | | | | | |
| Austria | Men | 2,4 | 4,9 | 7,2 | 8,6 | 8,6 | 8,6 | 8,0 | 7,7 |
| | Women | 23,9 | 30,3 | 33,0 | 35,0 | 34,7 | 34,7 | 34,3 | 34,0 |
| Czech Republic | Men | 1,6 | 1,6 | 2,3 | 2,5 | 2,6 | 2,7 | 2,8 | 3,0 |
| | Women | 5,4 | 5,5 | 7,0 | 7,4 | 8,0 | 8,7 | 8,5 | 8,3 |
| Germany | Men | 4,8 | 7,3 | 7,8 | 9,3 | 9,1 | 9,4 | 9,3 | 9,5 |
| | Women | 33,9 | 38,8 | 38,2 | 37,4 | 36,9 | 36,8 | 36,6 | 36,3 |
| Greece | Men | 3,0 | 3,2 | 5,1 | 7,3 | 7,3 | 7,2 | 6,8 | 6,7 |
| | Women | 9,4 | 11,4 | 14,5 | 16,3 | 16,1 | 16,4 | 15,5 | 15,7 |
| Hungary | Men | 1,7 | 2,0 | 2,6 | 3,0 | 2,6 | 2,3 | 2,4 | 2,5 |
| | Women | 4,7 | 5,3 | 5,4 | 6,0 | 5,4 | 5,1 | 5,4 | 5,8 |
| Netherlands | Men | 13,1 | 15,3 | 17,2 | 19,5 | 18,7 | 18,9 | 19,2 | 19,4 |
| | Women | 57,3 | 60,7 | 60,6 | 60,7 | 59,7 | 58,6 | 58,0 | 56,9 |
| Poland | Men | 8,8 | 7,1 | 5,2 | 3,8 | 3,5 | 3,4 | 3,5 | 3,3 |
| | Women | 17,9 | 17,4 | 13,1 | 9,6 | 9,1 | 9,5 | 9,2 | 9,0 |
| Slovak Republic | Men | 1,0 | 1,3 | 2,7 | 4,1 | 4,2 | 4,1 | 3,4 | 3,3 |
| | Women | 2,9 | 3,7 | 4,8 | 7,8 | 7,6 | 7,9 | 6,9 | 6,7 |
| Switzerland | Men | 8,4 | 9,2 | 9,4 | 10,9 | 10,8 | 11,3 | 11,1 | 11,0 |
| | Women | 42,7 | 47,6 | 46,1 | 45,0 | 44,7 | 44,5 | 44,6 | 44,9 |
| United Kingdom | Men | 8,5 | 9,5 | 11,6 | 11,9 | 11,7 | 11,5 | 11,4 | 11,2 |
| | Women | 40,7 | 38,5 | 39,3 | 37,7 | 37,5 | 37,0 | 36,4 | 36,1 |
| United States | Men | 7,7 | 7,8 | 9,3 | 8,8 | 8,8 | 8,5 | 8,4 | 8,3 |
| | Women | 18,0 | 18,3 | 19,2 | 18,0 | 18,2 | 17,7 | 17,2 | 16,8 |
| OECD - Average | Men | 6,7 | 7,6 | 9,1 | 9,5 | 9,4 | 9,3 | 9,3 | 9,6 |
| | Women | 23,7 | 25,1 | 26,3 | 25,9 | 25,8 | 25,5 | 25,4 | 25,4 |

Source: OECD



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