
Introduction

What matters most when everything seems to matter?



Mike Gedye

Head of Technology Sector
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I'm pleased to welcome you to our first Occupier Priorities Survey, which draws on findings across all industry types to reveal the key topics driving real estate strategy.

We are at a unique inflection point in the real estate sector, where external market conditions and the influence of the pandemic have fundamentally challenged the status quo. Whether driven by the ongoing global energy crisis, ESG targets, inflationary and economic factors, or simply the return to the office, corporate real estate leaders are currently being faced with a diverse range of critical issues to tackle simultaneously.

Unlike previous market adjustments, this is not a single sector, geographic or asset class challenge, but something which is impacting everyone, everywhere. The biggest challenge that occupiers are under pressure to answer is: what matters most when everything seems to matter?

This report explores:

Occupier priorities overview

Our survey findings reveals the biggest priorities of 52 occupier clients across all industry types.

12 real estate key topics and the occupier challenges

The key topics occupiers are facing and the associated challenges.

CBRE solutions and services

Our guidance on how to prioritise when faced with real estate challenges including practical examples and outcomes achieved.

If you have questions on any of the key topics, or you're in need of advice on how to translate different priorities into immediate actions, please do get in touch.

Occupier Priority Topics

ESG, closely followed by Sharpening Portfolio Performance were revealed as the top two occupier priorities determining real estate strategies.

The corporate push for ESG could potentially be slowed down by the second ranked priority to Sharpen Portfolio Performance, in the face of a tough financial environment.

Priority: ● 1 ● 2 ● 3 ● 4 ● 5

Critical Environment For Digital Advancement



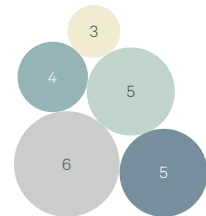
ESG* *Environmental, Social & Governance



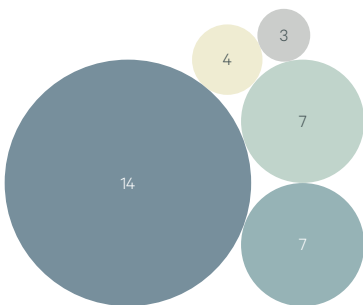
Logistics, Manufacturing & Supply Chain



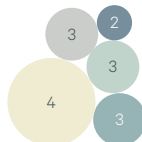
Business Analytics & Data



Sharpening Portfolio Performance



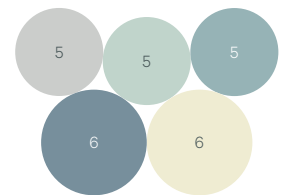
Digital & Technology (Products & Services)



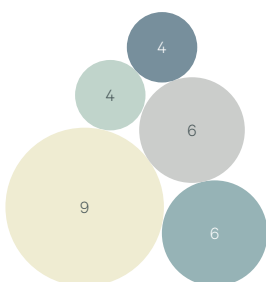
Home & 3rd Party Flex Spaces



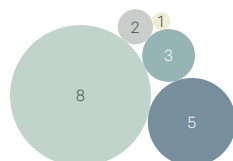
Economic Challenges



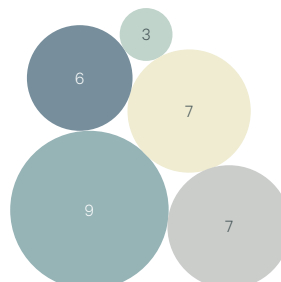
Return To Office



Labour Supply & Location Selection



Skills & Talent



Landlord & Tenant Relationships Redefined



ESG

ESG in action

Need

A leading UK-based TMT company had set ambitious corporate ESG targets, including net zero goals. They wanted to align their real estate portfolio with their goals as they undertook relocations, acquisitions, and disposals.

Solution

We led a workshop with key stakeholders to align on priorities, strategy, and direction. The outcomes led us to review existing site selection criteria and the approval process. We recommended an extension of the range of topics considered and the data requested to ensure full alignment with corporate goals.

The ESG site selection matrix included:

- Consideration of energy consumption
- Full scope carbon emissions
- Active transport and amenities
- Water consumption
- Waste generation and treatment
- Health and wellbeing factors
- Social value
- Landlord ESG policies

Outcome

The ESG site selection criteria were incorporated into the broader approvals process, directly informing decision making. The issues raised have also been integrated into fit out and operations guidance.

ESG is a major priority: we are redefining our purpose and starting to echo that as far as possible in our real estate footprint.

What are the key challenges?

- Getting to net zero
- Wanting to be associated with environmentally high-quality real estate
- Demonstrating you are operating safe and healthy spaces
- Wanting to be known as a leading organisation for diversity, equity and inclusion workplaces and policies

What's the approach?

We build innovative climate, social value and wellbeing solutions that deliver transformational outcomes for the environment and people.

- ESG solutions to support every stage of the property life cycle including acquisition, development, management, and disposal of properties
- Action plans at portfolio, property, and asset level
- Integrating ESG requirements and ambitions into strategy to help you to secure investment
- Leveraging the value chain, using your purchasing power to encourage positive change. We support smart supplier decisions that shape the way services are delivered while managing risk

How can we help?

We help our clients by simplifying the approach.

- Net zero strategies that reduce, mitigate and offset your climate impact aiding business resilience
- Social value assessments and plans to connect you to the communities within which you operate
- Talent attraction and retention via a compelling and engaging narrative alongside health and wellbeing strategies
- Create a culture of sustainability – ESG upskilling and focussed training
- Collaborating with investors and landlords to meet your goals and ambitions
- Best practice: ESG reporting, disclosures and public targets that meet regulatory requirements and demonstrate leadership to your customers
- Energy optimisation and procurement strategies to reduce cost and manage risk
- Zero waste and other resource-based strategies to improve efficiency

What differentiates us?

- Cross-sector collaboration to anticipate our clients' strategic needs is key. We ensure your real estate strategy aligns to your purpose, corporate identity and to the demands of your customers. Our dedication to the success of our clients has helped us build lifelong partnerships.

Contact Us



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Sharpening Portfolio Performance

Portfolio strategy in action

Need

We were asked to re-assess a client's global real estate portfolio of 275 properties to support post-COVID ways of working. And to embed a global cultural transformation programme as part of an initial 3-month sprint project.

Solution

We worked with our client to identify three key routes to deliver the brief. The business case for each scenario included financial modelling, market value assessments and an execution strategy.

Outcome

The implementation of our supply led strategy across the portfolio identified a potential 51% reduction in space, and \$215m p.a. (57%) saving in RE costs. We helped our client obtain board approval and are now working on a comprehensive execution programme.

A real estate portfolio that supports financial targets and sustainability agendas, improves efficiency and agility to support operations. This is positioned to attract the right talent, productivity and wellbeing, and is a showcase for the culture and brand.

What are the key challenges?

Our clients are telling us that cost is increasingly important in the face of challenging market conditions. This emphasises the need to manage infrastructure expense efficiently, whilst realigning the real estate portfolio with hybrid working policies and changing business dynamics.

What's the approach?

- We engage stakeholders and create portfolio plans that align with your strategic objectives
- We provide expertise in Location and Workplace Strategy, to ensure location insight and ways of working can be translated into opportunities
- Our market brokers validate the strategies to ensure alignment with local market conditions and trends
- We model the cash and P&L impact of different strategies and assess which creates the best value or biggest savings
- Market rates, lease clauses, fit out costs and risk profiles, are all considered to determine the best course of action to drive savings
- We turn strategy into results

How can we help?

We can help clients rebuild their real estate strategies in response to changing expectations from leaders and employees regarding working practices. We provide the right insight and advice to guide their strategies as they navigate uncertainty.

What differentiates us?

Our team develop innovative solutions to unique and complex challenges.

- We hire and nurture subject-matter experts, then focus on integrating their knowledge to deliver comprehensive solutions
- Our consultants have access to unrivalled, global, market-leading intelligence and proprietary data on how employees and companies occupy space
- We derive our insights from data to develop informed and relevant tools, services, and solutions
- Our solutions are based on a deep understanding of what it takes at a practical level to ensure successful implementation

Contact Us



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Return To Office

Workplace strategy in action

Need

Our client wanted to establish which hybrid model to apply. They required our help in determining and delivering the optimal level of infrastructure and support.

Solution

We carried out an impact analysis of the current hybrid model, advising on the level of space re-modelling required. We also planned and managed initiatives to socialise the new way of working including training leaders and managers.

Outcome

- We defined and agreed a blueprint for hybrid working with our client, supported by leaders and employees
- A 30% reduction in office space contributed to funding the re-modelling of the retained space
- A successful return to the office and an increase in employee engagement scores

CBRE is helping companies to reimagine the workplace experience and address the challenges of 'Making Hybrid Work'.

What are the key challenges?

Our research tells us that companies are more uncertain on their 'Future of Work' plans than in 2021. We think this reflects the challenges companies are facing in implementing effective hybrid working practices and in attracting people to spend regular time at the office.

What's the approach?

- We have devised a series of interventions that help our clients to get to the root cause of the challenges they are facing with hybrid working
- We help our clients put a practical plan in place including measured investment; guidance and training; and targeted behavioural change
- We guide you through the implementation of this plan ensuring you have the appropriate support and access to expertise to succeed

How can we help?

It's clear that companies are struggling to make hybrid work. It's a complex and emotive topic for both employees; who have adapted their work and personal lives to remote working, and for leaders; who are concerned about employee engagement and productivity.

We believe there are three key areas where employers can step up to improve and gain advantage:

- The workplace experience that employees have when they visit the office
- The hybrid infrastructure in place to support effective hybrid working
- The culture and behaviours that are established by leadership

What differentiates us?

Our experts in Human Capital and Workplace Consulting can help you diagnose the challenges you are facing and provide practical guidance and support. No matter your starting point, our diverse global team of experts have direct experience in helping clients navigate the challenges arising from hybrid working and the implications on real estate.

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Skills & Talent

Human Capital Practice in action

Need

Our client recently completed an office re-design, with a reduction in dedicated workspaces per employee. The new space was strategically designed to enhance cultural elements such as wellbeing and inclusion. We were brought in to help with the modification of employee behaviours to ensure the office vision was effectively executed.

Solution

- We identified and agreed key moments where it was important to be in the office
- We worked with key stakeholders to agree the behaviours that employees would hold themselves accountable to
- We proposed a multi-platform strategy, allowing us to effectively reach different parts of the business via behavioural nudges
- The behavioural nudges were designed to ensure leaders were committed to the vision, line managers were supporting it and employees were gaining awareness and continued reinforcement

Outcome

- Our client has experienced an average occupancy rate of 70%, 80% at its peak
- Company performance, measured by revenue, has increased. Although this cannot be solely attributed to the new behaviours in the office, our client is happy that the behaviours outlined in the vision are being demonstrated
- Employees are engaged and talking positively about their work environment. Feedback suggests they feel proud of their space, and attrition has reduced

Contact Us



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The pandemic transformed the way we work – in addition advances in technology, societal demands and economic changes continue to redefine the workforce. These challenges are critical to resolve, but with the reliance on changes in human behaviours and practices, the journey seems near impossible.

What are the key challenges?

We know there are challenges when it comes to planning for the ‘workforce of the future’ and implementing a successful hybrid working culture.

- How to define and build effective leadership as expectations shift and “normal” is redefined, e.g. being productive, collaborative and transparent in a hybrid working environment
- Defining new roles and/or skills to facilitate optimal performance in executing hybrid working strategies e.g. Head of Hybrid role
- Building a people pipeline from unconventional sources, to fill vacancies
- Creating measurable behaviour change within your talent groups, from changing how people use the office to how often they use the office
- Building inclusive environments
- Bringing target cultures to life

What’s the approach?

- The process starts with a diagnostic that assesses proven success factors, and/or benchmarks, against leading practices in the industry
- The agreed strategy is underpinned by technology driven transformation that provides quantifiable ROI
- We ensure you have the backing of data when providing feedback internally, we know this is an area that can be highly scrutinised

How can we help?

- Bring quantitative and qualitative workplace insights and benchmarking information to your challenge
- Provide technology-powered solutions to target quantifiable change for your problem statement

What differentiates us?

- Deep knowledge on the intersection between people and place
- Insights from comprehensive data and client conversations
- Partnership with technology platforms proven to accelerate diagnostics and transformation

Digital & Technology

Strategic consulting in action

Need

Recognising the important role of digital in helping drive physical and virtual experiences, the client wanted help to define their strategy for PropTech. They required a clear framework to help them identify and prioritise the right digital solutions for their real estate teams. They also needed a standardised process to be put in place to measure the success and benefits of digital.

Solution

- CBRE completed a baseline review, exploring current challenges and future needs for digital
- A new vision for PropTech was created, with OKRs to guide the investment
- We used an agile approach to develop initiatives, use cases and user stories that would help the client achieve their new objectives
- Changes to the wider operating model were proposed and implemented across people and organisation, process and governance, technology and data

Outcome

- Stakeholders aligned on 18 digital use cases
- New processes for PropTech investment were created and embedded
- We reviewed the operating model and identified areas for improvement, including creating new digital roles and responsibilities

We are industry leaders in providing digital advice to clients and our specialist team brings market-leading expertise to help you navigate the complexities of digitalising real estate.

What are the key challenges?

- Assessing the digital status of your real estate and defining your future vision
- Addressing the variable demands from occupiers based on hybrid workplace models
- Asset performance that reduces OPEX and CAPEX, including ESG and carbon targets
- Complexity of the PropTech market; finding the right solution and integrating it into your current infrastructure

What's the approach?

- We focus on outcomes over 'point solutions'
- Creating a tailored digital strategy for our clients informed by a 'top-down' understanding of your desired business outcomes and learnings from the 'bottom-up', where you have already begun implementing digital initiatives
- Evaluating specific constraints and opportunities along the way, constantly reviewing, and evolving our approach

How can we help?

- Strategy: Helping you identify the best digital outcomes to meet your business and asset/workplace needs
- Solutions:
 - A solution led strategy that defines requirements, system schematics and schedules
 - Identifying and securing the best solution partners for you
- Transformation: Supporting the roll-out of transformation programmes through programme management, change management and organisational design

What differentiates us?

- Our experienced team understand the importance of a clear digital strategy and roadmap that reflects your future goals
- Our combined consulting and technical skills alongside our business and real estate knowledge helps us to navigate complex scenarios and simplify them for you
- We translate market knowledge into business benefits with measurable outcomes
- We see the bigger picture and help clients understand how digital can drive better outcomes across sustainability, efficiency, productivity, health and wellbeing, experience, and security

Contact Us



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Economic Challenges

Economic research in action

Need

Our client (a multi-market financial sector office occupier) wanted to carry out a full portfolio review across all occupied buildings, with a focus on those with upcoming lease events or other material decisions.

Solution

- We provided comparative prime rents for each of the subject cities, as an initial basis for gauging the client's position in each market
- For each asset/market we provided directional forecasts of rent, vacancy and development activity
- Local broker teams advised on the asset's prospects in the context of future market conditions

Outcome

Our client brought forward decisions on key assets, accelerated negotiations on others and was able to identify and execute value-enhancing actions across the portfolio.

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Detailed understanding of economic prospects, risks and scenarios is a vital input to many elements of corporate real estate strategy, including portfolio planning, occupation strategy and cost forecasting.

What are the key challenges?

After some positive readings in the immediate post-pandemic period, various factors have combined to cause a weakening in the short term outlook

- Rising energy prices and other input costs
- Higher interest rates and cost of capital to corporates
- Very weak consumer sentiment
- Some rebalancing of demand away from manufactured goods towards services
- Inflation persistence and uncertainty around the speed and scale of monetary policy response
- Labour market changes, including shortages in certain skills markets

What's the approach?

- CBRE produces its own house view and generates forecasts of a wide range of key economic variables (GDP, inflation, employment, interest rates etc.) at national and city level
- Our economic forecasts form the basis for forecasts of property values in key markets
- Our forecasts are updated at least quarterly and, importantly given current economic conditions, can be flexed to accommodate different scenarios and policy settings
- As well as providing a broad basis for strategic portfolio level decision-making, the forecasts can also be used to derive cash flows for individual assets, and to assess the sensitivity of lease liabilities to external conditions
- The forecasts can be used to inform rent-buy decisions

How can we help?

- Our Economics team maintains and regularly updates a proprietary model that forecasts property rents and values across the main commercial sectors and markets across Europe, based on a range of underlying economic factors
- Pinpoint areas of opportunity and risk, based on the future pattern and timing of rent and value growth
- Informing key decisions on acquisition, disposal, lease events and tenure. Key input to portfolio audits and stay v go analyses

What differentiates us?

- We produce regular updates of key economic and property market variables
- Apply these to a range of occupiers' property decisions, including portfolio strategies, market expansion or consolidation, lease renewals and cost planning
- Asses the sensitivity of decisions to different economic and policy assumptions

Business Analytics & Data

Business Analytics in action

Need

Our client wanted to provide visibility to their stakeholders of which properties required urgent market reviews, based on headcount forecasts and lease options.

Solution

- We integrated the client's portfolio from our Sequentra Lease Admin and TransAct™ systems with their in-house hosted Space Mgmt System
- With this integrated data we provided live and interactive analytics for us and the client to review with key business stakeholders, to drive portfolio strategy

Outcome

Our client was able to identify all major upcoming opportunities and risks because of utilisation trends, capacity, market rent movements, and further data provided by our team.

Interpreting data at scale is required to drive proactive business decisions and operational transparency.

What are the key challenges?

We understand the data and analytics challenges occupiers are facing in a complex real estate and technology landscape. These can include:

- Turning data into insight
- Data governance, quality, and reliability
- Integrating assets across in-house and vendor tools
- Integrating datasets across disconnected real estate functions to drive decision making with context
- Benchmarking
- Automation

How can we help?

- A technology-agnostic approach – to date we have integrated 194 different source systems (and counting) into our analytics platform
- Talent – we have more than 100 data analysts, scientists, architects, and engineers, specialising in real estate analytics. They support all our specialist teams
- Data governance – we apply rigorous data standards and controls, guaranteeing the security, integrity, and usefulness of data
- Our proprietary Vantage Analytics platform is built with a series of 'best-in-class' dashboards to address a broad set of known business requirements
- Help reduce portfolio costs and manage risks
- Help maximise our clients' investments in technology and data

What differentiates us?

- Partner with you at the cross-section of real estate and data
- Data and analytics specialists
- Industry leading reporting and analytics to drive strategic and operational decision making
- Our global market benchmarking datasets

Contact Us



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Labour Supply & Location Selection

Location strategy in action

Aligning location strategy and site selection to business drivers to deliver competitive advantage.

Need

Our client wanted to expand their tech headcount in EMEA and was considering both existing and new locations.

Solution

- CBRE undertook a detailed desktop study to identify 10 cities which could support the required headcount growth and meet labour cost constraints
- Following a detailed analysis of five shortlisted cities, we identify the best location, and potential fallback options

Outcome

- Our client comfortably reached their recruitment objective of 150 employees. The location has proved so successful, headcount has since expended to over 400
- Their final location choice was not on their working shortlist
- The client has since said that without CBRE they would have never chosen the eventual location, their continuing expansion demonstrates success

What are the key challenges?

- Attracting and retaining talent
- Reducing cost by relocating roles to lower labour cost locations
- Rightsizing portfolios to respond to the impact of hybrid working
- Identifying tech talent pools
- Entering new markets
- Understanding business environments, regulation, ESG and risk

How can we help?

- Understanding what companies need to offer to compete for talent in cities and quantifying demand from companies competing for the same skills
- Identifying saturated labour markets
- Benchmarking location strategies with peers
- Reducing labour costs by 20-30% through relocating to low-cost onshore alternatives, or 50-70% through nearshoring and offshoring
- Providing independent, objective advice and a decision framework that gives a rationale for locations being selected or rejected

What's the approach?

- Understand client business drivers, aims and success factors
- Align objectives with geographies and business functions
- Validate location selection metrics
- Phased shortlisting of locations using client-defined data points
- Work with local brokerage colleagues to deliver real estate solutions and operational workplaces

What differentiates us?

- Over 20 years' experience of delivering location strategy projects
- Integrated global team with consistent approach to location selection
- Market-leading analytics and peer benchmarking
- Mix of third party and primary data, leveraging our tech expertise to provide datasets our competitors do not have
- Delivering strategy to solution with our brokerage colleagues

Contact Us



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Logistics, Manufacturing & Supply Chain

Location Advisory in action

Need

A leading ecommerce retailer experiencing significant growth needed a UK warehouse network strategy that would meet the increased volumes, reduce cost per unit and increase service levels.

Solution

- We presented collaborative, future requirement driven, network optimisation analytics, to model the potential warehouse configurations and agree a future-proof network
- The modeling approach allowed the client to evaluate a variety of solutions, trading off transport and warehousing costs with service and operational constraints

Outcome

A plan delivering 12% operating cost savings, 19% CO2 emissions savings and 20% of volume brought within 50 miles of a hub. This was seamlessly executed with our brokerage colleagues.

We deliver Location Advisory Services for industrial assets which means evaluating, defining, designing and implementing solutions for manufacturing, retail and logistics organisations.

What are the key challenges?

- Maximising cost-efficiency of logistics and manufacturing operations and assets
- Changing consumer behaviours
- Tackling rising operating costs, primarily labour and energy
- Planning and executing the required supply chain for the business
- Winning the battle for industrial labour
- Delivering ESG improvements against a challenging backdrop

What's the approach?

- 10% of supply chain costs are related to the real estate itself, 40-80% are driven by the operating supply chain; this is where we focus to identify the trade-offs and inform business decisions
- Our ex-industry consultants and data specialists use data-driven insights to deliver impartial supply chain recommendations and improvements

How can we help?

- Reduce on-site operating costs by 5-15% whilst driving service improvements
- Reduce supply chain costs and emissions by 10-15%
- Deliver cost-optimal facility design
- Deliver operational outsourcing projects
- Deliver market-first action-driven recruitment and retention strategies

What differentiates us?

- Located at the pivot between real estate and supply chain operations, bringing a unique perspective on holistic value
- With the support of our brokerage colleagues, we can define and execute the strategy with you

Contact Us



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Home & Third Party Flex Spaces

Agile consulting in action

Need

Our client, an international tech operator, wanted to contract small offices in locations where they are developing market share. Largely, the requirements were for a size that would be challenging to resource and deliver efficiently. Some requests were also in cities where we, along with our competitors, have no agency presence. Our client required a quick turnaround.

Solution

- Our Agile Practice and the client agreed to a standardised playbook defining the inputs and actions needed by both to ensure a smooth and replicable workflow
- We used proprietary MKII and FAST tools, combined in some markets with CBRE brokerage to source flex offices in the requested locations
- We negotiated every license and contract, including client T&Cs as defined in the playbook

Outcome

- The client contracted 23 offices with Agile Practice, with many more in the pipeline
- The selected operator in many markets was not one of the international brands, however competitive pricing and standard client terms were negotiated
- Agile Practice keeps track of renewal dates and will do market surveys to ensure a favorable renewal rate; the client is now looking into increasing their collaboration with us

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Developing a flexible portfolio strategy will help future-proof your organisation against unforeseen change.

What are the key challenges?

- Creating a real estate portfolio that can react to changes in business strategy and space demands
- Providing effective workspace to employees to help with talent attraction and retention
- Aligning with balance sheet pressures and constraints

What's the approach?

- CBRE combine market knowledge, data and innovative technology tools to advise on the best flex spaces available within specific markets
- We provide strategic advice to occupiers on implementing flexible and on-demand space into their portfolios
- Given the interdependencies with core space, we are able to offer a holistic portfolio approach combining traditional and flex strategies

How can we help?

- Our innovative technology tools and data-driven advice: We are the only leading real estate company to provide a specialist Agile consulting team – we help you create a diversified and flexible portfolio
- Leveraging global relationships with key coworking operators: We transact more space globally than any other company – we bring this weight to the negotiation table
- Combining our specialist advice with on-the-ground brokerage expertise: We have the broadest network of dedicated local market flex brokers
- Develop a flex strategy for you, locally, regionally or globally

What differentiates us?

- Advise on the implementation of a flex programme rollout, including tech, security and operational considerations
- Provide benchmarking and portfolio diagnostics to identify opportunities
- Identify global flex provider partners and negotiate MSAs with operating parties to enable efficient roll-out of space
- Survey any global market for available flex space
- Compare the cost of traditional and flex space lease options using IAS/GAAP compliant output to assist in options analysis or approval stages
- Arrange tours, documentation and negotiate best terms on flex transactions

Critical Environments For Digital Advancement

Data Centre consulting in action

Need

- A leading international bank wanted to reconfigure their London HQ and reduce real estate costs following the introduction of hybrid working
- This change was prevented by a highly embedded data centre on a single floor of the building

Solution

- We benchmarked internal cost estimates and provided expert co-location acquisition experience to find a new data centre
- We also developed a comprehensive relocation plan to reduce risk and supplemented internal IT resources

Outcome

- We delivered a plan resulting in a 30% reduction in operating costs which enabled the bank to reduce total real estate footprint by 20%, saving >£1.4M per annum
- We seamlessly and expertly executed this with our brokerage colleagues with no downtime

Contact Us



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CBRE has over 20 years' experience operating specialist teams that provide data centre advisory services. From consulting to transactions and market leading research, CBRE is the only global full-service data centre services provider.

What are the key challenges?

- Creating an informed strategy for change, incorporating real estate market commercials and capabilities, whilst accommodating IT and business aspirations
- Reducing cost of existing and legacy IT environments and infrastructure
- Delivering ESG and sustainability improvements related to IT infrastructure
- On-premise IT impacting real estate decisions and reducing business agility
- Risk of failures and outages is up to 10 times higher in premise environments compared to purpose-built facilities

What's the approach?

- Our team benefits from having a strong blend of market leading IT Infrastructure consultants, Capital Markets specialists, Research and Site Transaction experts and the most experienced Occupier Services team in the market
- A team of ex-industry, consultant and data specialists come together to deliver a unique blend of experience and data-driven insights to deliver impartial supply chain recommendations and improvements

How can we help?

- Develop a compelling transformation business case
- Reduce costs by up to 80% by moving on-premise IT to purpose-built facilities
- Reduce cost of existing third-party sites by up to 20% as well as improving OLAs and SLAs
- Improve sustainability by up to four times, by moving on-premise IT to purpose built data centres
- Benchmark internal cost estimates
- Expert co-location acquisition experience
- Reduce relocation risk
- Supplement internal IT resources
- Enable change and remove IT as the barrier to real estate agility

What differentiates us?

- As the world's largest and most experienced Data Centre Advisory team, we have undertaken more transactions, and provided solutions for clients in more geographies than anyone else
- Spanning both the real estate and technology worlds, we can advise on all aspects of our client's strategy and ensure that we are providing the optimal solution for all stakeholders

Landlord and Tenant Relationships Redefined

Landlord & tenant relationship redefinition in action

Need

A global bank, headquartered in London, occupied over 200,000 sq ft on a lease until 2027. Having adopted an agile strategy post-Covid, they had excess space in a building that required substantial investment over the remaining lease term in space and amenities.

Solution

- We engaged with the best traditional landlords and co-working operators in London, who specialise in creating amenity rich buildings with strong ESG credentials
- We evaluated best-in-class for 2022, as well as pre-let options to understand the future direction
- The early engagement with their current Landlord and other owners, enabled the occupier to translate our findings into what a 'best-in-class' stay option could look like

Outcome

- We secured significant savings for the occupier from their current liability, releasing surplus space, with no restatement liability
- We encouraged the Landlord to enrich the building with amenities and better end-of-trip facilities
- Promoting a progressive ESG agenda for the future building, aligned with our client's brand values. This included achieving appropriate credentials and incorporating green leasing provisions

Contact Us



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Helping reshape the landlord and tenant relationship to become less transactional and more of a partnership in a post-covid world.

What are the key challenges?

The role and purpose of workplaces in the new hybrid era have been significantly disrupted. Employers and their employees are demanding a more dynamic, consumer centric service model, the landlord and tenant relationship has been slow to adapt with:

- Complex and time consuming lease agreements
- Largely transactional relationships focused broadly on the provision of space
- Long term and frequently inflexible lease commitments
- Built environments which are not tailored to the specific needs of the occupier

What's the approach?

Through our extensive market network across landlords, investors, developers and occupiers, we are helping to influence and shape the office product to better meet occupier needs and closing the gap of expectations between landlords and tenants.

How can we help?

- Help to close the gap between landlord and tenant expectations
- Assist occupiers to translate their specific sector, brand and cultural requirements and ensure landlords better reflect these needs into both the base build and contractual obligations
- Better represent tenant requirements, particularly through lease renewal / regearing processes, to ensure landlords take a more direct interest in combining space as a service

What differentiates us?

- We help occupiers incorporate their specific needs including ESG, health & wellness, flexibility and amenities into their physical specifications and commercial negotiations with landlords
- Close the gap of expectations between owners and occupiers to facilitate a greater partnership approach
- Facilitate discussions where landlords need to prioritise investments on the 'moments that matter' for occupier clients
- Shape and influence the pipeline, i.e. product specification, services and amenities to meet the future needs of occupiers
- Help combine traditional and flex solutions (direct or with third party providers) to enable increased flexibility in landlord solutions

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