

WORKPLACE [R]EVOLUTION

FIND YOUR SPACE TO THRIVE

REVOLUTION

**Why people choose
the workplace**

INSIGHTS

**The workplace
performance gap**

INNOVATION

**When AI moves
from insight to action**



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Welcome to the WORKPLACE (R)EVOLUTION

Every organisation relies on a workplace.

Whether it is a corporate headquarters, manufacturing facility, laboratory, data centre, healthcare environment or public infrastructure, the workplace shapes how people perform, how resources are used and how organisations create value. Yet workplaces are changing.

Expectations around employee experience are continuing to evolve, sustainability goals are becoming more ambitious and technology is reshaping decision-making. However, growing cost pressures are forcing organisations to think differently about efficiency, resilience and long-term performance.

Many leaders recognise the workplace as a strategic asset, but are still searching for practical ways to unlock its full value.

This first edition of WORKPLACE (R)EVOLUTION explores that transition.

We'll examine the forces shaping the future of workplaces, the innovations helping organisations respond and the impact that thoughtful workplace strategies can create for people, businesses and society.

We'll look at topics ranging from artificial intelligence and asset management to Net Zero, social sustainability and safety, alongside

stories from organisations and individuals helping redefine what workplace performance means in practice.

While technologies, expectations and challenges may continue to evolve, one idea remains constant: workplaces perform best when people can perform at their best.

We hope this edition offers fresh insight, practical inspiration and new perspectives on the evolving role of the workplace.

To receive future editions and related content digitally, scan the QR code below. Digital subscriptions offer a convenient way to stay up to date while helping reduce paper consumption.



J Sharkey
James Sharkey
CMO, ISS A/S

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Why people choose the workplace

Based on insights from nearly 11,000 employees across 15 countries, ISS' research suggests the debate around workplace attendance may be asking the wrong question. The real issue is not whether people come to the workplace, but why they choose to be there.

Hybrid working has become a permanent feature of modern work. Yet as organisations continue to debate attendance, employees are becoming more selective about what makes presence valuable.

Some come for collaboration, while others come for focus, routine or a sense of purpose. The result is that today's workplace is expected to support multiple motivations at once. Understanding those motivations is becoming essential for organisations seeking to create environments where people can perform, connect and thrive.

What makes the office worthwhile?

- 51% value social interaction and workplace experience
- 20% value a different environment
- 17% value workday structure

81%

of employees work in a hybrid arrangement

47%

expect no change in their remote working patterns over the next five years

71%

say the office remains important



ISS research identified four distinct workplace personas, revealing that employees are motivated to be in the workplace for very different reasons. Understanding these motivations is increasingly important when designing workplace experiences that create value for both people and organisations. →



Anchored routine-seeker

Primary motivation
Stability and productivity

How they use workplaces
Regular, predictable days

What "good" looks like
Frictionless routines

What breaks the experience
Uncertainty and noise

Emotional driver
Security and confidence

Design implication
Design for reliability



Purposeful visitor

Primary motivation
High-value connection

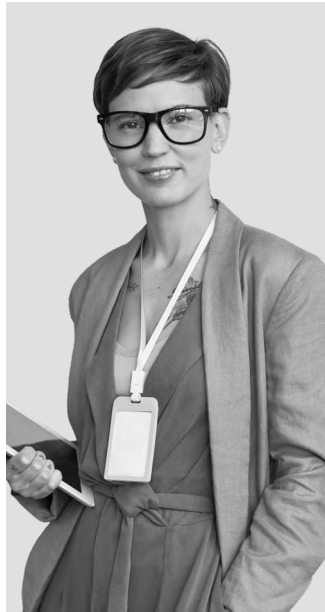
How they use workplaces
Selective, intentional visits

What "good" looks like
Energy, interaction and learning

What breaks the experience
Empty spaces and poor coordination

Emotional driver
Momentum and belonging

Design implication
Design for connection



Focused escape-seeker

Primary motivation
Deep focus

How they use workplaces
Concentrated work sessions

What "good" looks like
Calm, quiet and control

What breaks the experience
Distractions and crowding

Emotional driver
Calm and clarity

Design implication
Design for protection



Values-driven aligner

Primary motivation
Purpose and alignment

How they use workplaces
Symbol of values and culture

What "good" looks like
Inclusive, ethical experience

What breaks the experience
Performative values

Emotional driver
Trust and pride

Design implication
Design for credibility

From workplace management to experience orchestration

Understanding why people choose to be present is only the first step. The next challenge is creating workplace experiences that support those different motivations, while still delivering a coherent experience for everyone. This requires a shift from managing spaces to orchestrating experiences.

64%

of employee responses say a better workplace experience would motivate them to be in more

1 in 4

employee responses cite a dissatisfaction with their current workplace environment

The workplace as a system

Employees do not experience the workplace as a building. They experience it as a series of moments throughout the day, from planning and arrival to collaboration, food, services and departure. Each interaction shapes how people feel about being there and whether the workplace delivers value in return for their commute.

Organisations that are succeeding in hybrid environments are increasingly looking beyond individual spaces and focusing on the entire workplace journey. Their goal is not simply to provide a place to work, but to create experiences that support different employee needs while reinforcing a shared culture and sense of belonging.



Four shifts shaping the future workplace

Design for contrast, not consensus

Rather than designing for an average employee, leading organisations recognise that people need different things from the workplace, often on the same day. They balance collaboration and focus, flexibility and routine, energy and calm.

Curate moments, not just spaces

Experience is shaped by small interactions across the day. Arrival, meetings, hospitality, food and support services all contribute to whether employees feel their time in the workplace was worthwhile.

Treat employees as guests

Welcoming environments, reliable services and intuitive experiences help create trust, engagement and a stronger connection to the workplace.

Make values visible

Sustainability, inclusion and wellbeing have become part of the workplace experience itself. Employees increasingly expect organisational values to be reflected in everyday decisions and interactions. ●

Six questions every workplace leader should ask

1. What outcomes should our workplace experience support?
2. Are workplace, HR, technology and real estate teams aligned around a shared vision?
3. Do we understand the different needs across our workforce?
4. Which moments in the workplace journey matter most?
5. How are we capturing and acting on feedback?
6. How do we ensure the experience is delivered consistently over time?

Explore the full research

Want to understand how leading organisations are redesigning workplace experiences for a hybrid world?

Scan the QR code to access The Workplace (R)evolution: Reimagining Presence and explore insights from nearly 11,000 employees and workplace leaders across 15 countries.



125 years of workplace evolution

For 125 years, ISS has followed the changing needs of work – from protecting buildings at night to creating environments where people, performance and service meet.



The first ISS service moment happened after dark.

In 1901, 20 night watchmen began their rounds in Copenhagen, protecting businesses while the city slept. **Their task was practical: keep buildings safe, reduce risk and give customers confidence that someone was looking after the places where work happened.**

That early idea still feels modern. Workplaces only work when people trust the environment around them.

Over the past 125 years, that trust has taken many forms. It has meant safety, hygiene, reliability, consistency, sustainability, wellbeing and care. It has meant adapting to new technologies, new labour markets, new customer expectations and new ideas of what a workplace should be.

The role of service has expanded with every shift. What once happened in the background is now part of how organisations perform, how people

experience their working day and how places create value.

That is why ISS' anniversary is not only a moment to look back. It is a lens on a bigger workplace story: **the move from protecting places to enabling environments where people and businesses can thrive.**

After 125 years, the question is no longer simply how to maintain a workplace. **It is how to make the workplace matter.** →



125

The evolution of making workplaces work

1901

Protecting places

ISS began as a night-watch company in Copenhagen, reflecting a time when growing cities and businesses needed new ways to protect property and create trust.



1934

Professionalising cleaning

With the creation of Det Danske Rengøringsselskab, ISS helped turn cleaning into a structured service model, supported by training, standards and a focus on employee conditions.



1960s–1970s

Scaling internationally

As workplaces and organisations became more international, ISS expanded beyond Scandinavia into new European markets. The name International Service System, ISS, was introduced in 1968, followed by the creation of a unified ISS Group in 1973 – marking a new era of scale, consistency and international service delivery.



Today

Enabling workplace performance

With more than 325,000 placemakers serving over 40,000 customers across 60 markets, ISS continues to connect people and places through service moments that make space for people, workplaces and businesses to thrive. ●



2000s

Integrating services

ISS shifted from a cleaning-led organisation towards a global facility services model, reflecting growing customer demand for joined-up, efficient and scalable workplace services.

As workplaces became more complex, service could no longer sit in separate silos. ISS developed its Integrated Facilities Management capability to connect services, teams, standards and workplace data, helping customers move from managing tasks to managing workplace performance.



Across 125 years, one thing has remained constant: service is ultimately about people.

Explore the full 125-year ISS story



Workplace performance gap

Most business leaders recognise the workplace as a critical driver of organisational performance. However, many still struggle to turn that belief into consistent, measurable outcomes.

This represents the workplace performance gap: the distance between believing in the workplace's value and making the strategic decisions to unlock it.

The gap in one glance

The workplace shapes how people collaborate, how services perform, how employees experience the organisation and how leaders manage cost, resilience and long-term value.

ISS' Facilities Management Outlook report, based on insights from nearly 3,000 business leaders across 28 countries and 24 industries, shows that workplace value is firmly recognised. The challenge comes when that belief meets budget pressure, uneven data confidence and stretched delivery capacity.



What is holding performance back?

Three forces shape how workplace decisions are made, funded and delivered.

Cost gravity

Economic pressure pulls workplace decisions towards short-term efficiency. With cost optimisation at the top of the FM agenda, transformation often becomes incremental, carefully phased and harder to scale.



Investment decisions prioritise **short-term** efficiency.



Risk appetite for experimentation **narrows**.



Transformation programmes are **phased** or **delayed**.



Capability-building competes with **budget control**.

The proof gap

Digitalisation is seen as disruptive, but investment confidence remains uneven. Organisations can see the potential of workplace technology and data, but many still need stronger proof of measurable impact.

46%

of leaders say digitisation and AI will be a major disruptor in the next 12 months (second highest).

27%

of leaders most need support from an FM partner in digital tools and data analytics.

20%

of leaders prioritise digitalisation in FM (one of the lowest priorities).

The execution gap

Experience and wellbeing are high on the agenda, but delivery remains challenging. Internal teams are balancing service delivery, compliance and cost control, making it harder to turn ambition into consistent workplace outcomes across the other areas. →

45%

of leaders are prioritising health, safety and wellbeing in FM.

44%

need support from an FM partner in delivering wellbeing initiatives.

43%

are prioritising employee experience in FM.

36%

need support from an FM partner in delivering employee experience.



THE RESULT

- Cost gravity limits appetite for change.
- The proof gap weakens investment confidence.
- The execution gap makes progress harder to scale.

Together, these forces slow the shift from workplace ambition to workplace performance.

Where the gap shows up

The workplace performance gap rarely appears as one big, visible problem. It shows up in the disconnects leaders deal with every day: siloed services, fragmented data, cost decisions made without a clear view of output and digital pilots that never scale.

That makes performance harder to see and harder to improve. The workplace is expected to support productivity, experience, resilience and cost efficiency, while the signals that shape those outcomes are often spread across different teams, systems and service models.

Do you have a workplace performance gap?

Ask yourself:

- Do workplace decisions rely more on assumptions than trusted data?
- Are cost savings considered separately from employee experience and service quality?
- Do digital pilots struggle to scale into everyday operations?
- Are wellbeing and experience initiatives measured consistently?
- Is FM expected to influence performance without a clear seat in strategic decision-making?

If the answer is yes to one or more, the gap may sit in visibility, alignment or execution.



Get the full report

Want to understand the data behind the gap?

Explore ISS' **Facilities Management Outlook: The workplace performance gap report**, based on insights from nearly 3,000 business leaders across 28 countries and 24 industries.



Scan the QR code to get your free copy.

Explore your industry view

Interested in a specific industry?

Dedicated FM Outlook insights are available for **Professional Services, Finance and Banking, Life Sciences and Manufacturing**.



Scan the QR code to find your industry deep dive.

What's next?

Closing the workplace performance gap

The Facilities Management Outlook report shows where the workplace performance gap comes from and why it persists. A forthcoming ISS Insights report will turn the focus towards action, and exploring how organisations can strengthen the connections between workplace experience, data, cost discipline and delivery.

The report will examine these practical choices that can help organisations move from pressure to progress:

From pressure to progress

Cost gravity → **Value discipline**

Maintain financial control while considering how cost decisions affect experience, service quality and performance.

Proof gap → **Performance insight**

Make workplace performance more visible, measurable and transparent to support confident decisions.

Execution gap → **Delivery confidence**

Strengthen operating models, governance and partnerships to deliver workplace strategies consistently and at scale. ●

Sign up for the latest insights

Stay up to date with the latest ISS research, perspectives and publications, including our upcoming report on closing the workplace performance gap.



Scan the QR code to sign up for news and insights.



When AI moves from insight to action

AI is already part of facilities management, so the more relevant question is what comes next: can it move from showing teams what is happening to helping them decide what should happen?

Most large organisations already generate considerable amounts of workplace and building data, covering everything from occupancy and energy consumption to asset performance, service requests and employee feedback. Yet much of it remains divided across systems and reports, limiting its value when teams need to act.

AI can help close that gap by analysing connected data and translating it into timely recommendations. Each response creates new performance information, forming a learning loop through which services can become more precise and responsive over time.

From fixed routines to adaptive operations

Reliable FM depends on structure, but performance also depends on responding to changing conditions. Connected analysis can identify emerging needs earlier and guide teams towards the most relevant action.

In practice, this may mean aligning cleaning with actual use, intervening when assets show early signs of failure or managing energy in the context of occupancy and comfort. Across a portfolio, the same approach can expose performance gaps, identify opportunities and strengthen compliance.

Adaptive operations also depend on managers being able to respond confidently when conditions change. ISS is piloting an AI-enabled approach that makes established workforce management practices easier to apply, supporting tasks such as planning workforce cover, assessing operational risks, checking decisions against relevant policies and defining performance measures. The guidance helps managers structure their response, while local knowledge and human judgement determine how it is applied in practice.



Enhancing workplace experience with AI

At one global banking customer, employees use an AI-enabled chatbot within ISS' Convenie workplace app to ask questions or raise issues. The chatbot directs requests to the relevant information, service or next step with 96% accuracy, creating a simpler and more intuitive route to support than navigating multiple systems or predefined categories.

What if reaching an operational insight started with a question, rather than another report?

Marius is ISS' intelligent analytical assistant, designed to help teams explore complex operational data, such as asset condition, proactive vs. reactive maintenance, workplace experience etc., using natural-language questions. Through a single interface, it connects governed data from multiple workplace systems, allowing users across roles and regions to access consistent, trusted insights without specialist analytical expertise.

Users can move from a high-level question to the factors behind the result, uncovering trends, anomalies and opportunities in real time. This makes it easier to understand what is driving performance, align teams around the same operational picture and focus attention where action can have the greatest impact.

By reducing the time spent searching for data, reconciling conflicting reports or waiting for manual analysis, Marius creates more capacity for higher-value work. Teams can investigate issues independently, make decisions with greater speed and confidence and use the resulting insights to support continuous improvement across facility services.

Named after ISS founder Marius Hogrefe, the assistant brings ISS' long-standing purpose of supporting people and businesses into a new, data-enabled context.



Turning data into operational value

For ISS, AI is a catalyst for turning operational data into practical value. Combining data across service lines can reveal connections that individual systems miss, allowing teams to identify risks and opportunities earlier and make more informed decisions.

The application may range from practical guidance for frontline teams to analytical support for managers overseeing performance across sites. The aim is to make relevant information easier to access, reducing time spent searching for answers and enabling teams to focus on service performance and continuous improvement.

Reliable data, clear governance and measurable outcomes provide the foundation. Accountability remains with people. ●



From ageing assets to ageless value

85%

of Europe's future buildings already exist. The challenge is making ageing, inefficient assets fit for tomorrow's needs.

The hidden risk in ageing buildings

In Europe, more than 85% of today's buildings are likely to still be in use in 2050, yet much of the building stock is ageing, energy inefficient and increasingly costly to adapt.¹ For many organisations, that creates a growing form of technical debt: assets may still operate, but the cost, risk and complexity of keeping them running increase year by year.

Buildings rarely become a problem overnight. Technical assets age gradually, performance declines over time and maintenance needs become less predictable. At the same time, hybrid work, carbon priorities and rising cost scrutiny are changing what organisations need from their buildings and the technical assets behind them.

The challenge is to help existing buildings perform better, protect resilience and last longer, without allowing ageing assets to erode long-term value.

The concept of Total Value of Ownership

Total Value of Ownership, or TVO, is an approach to managing technical assets based on their full lifecycle value. It connects operational expenditure, capital investment, asset condition, risk, resilience and performance into one decision-making model. Instead of treating maintenance, renewal and capital planning as separate activities, TVO helps customers understand how today's technical decisions affect tomorrow's reliability, investment needs and portfolio value.

In practical terms, TVO asks three questions:

- What assets do you have?
- How critical are they to your operations?
- Where will intervention create the greatest value across the portfolio?

The answer depends on trusted data, clear risk visibility and a portfolio-level view of where investment should be avoided, redirected or accelerated.

¹ European Environment Agency, "Buildings and construction", 20 February 2026.

Protecting value before ageing becomes risk

Every technical asset reaches a point where the next decision matters. Replace it too early and capital may be wasted. Wait too long and resilience, uptime and total cost of ownership can come under pressure. TVO helps customers identify the right intervention at the right time, so maintenance and investment choices are made before ageing turns into operational or financial risk.

Turning asset data into better decisions

ISS applies TVO through an integrated asset management approach. Reliable data is captured to show what assets exist, where they are, what condition they are in and how critical they are to operations. That insight is connected with financial planning, lease strategy, carbon priorities and operational needs, giving customers a stronger basis for decisions.

Proof points

Connected asset decisions can turn hidden risk into measurable value. In one example, ISS helped a customer avoid £1 million in unnecessary capital spend. Other portfolio-level programmes have supported a €44 million prioritised investment plan and up to 22% OpEx reduction across key locations. ●

Ready to rethink asset management?

Explore how ISS helps organisations turn asset data into better decisions, identify hidden risk and strengthen long-term performance across their portfolio.



Traditional maintenance vs. TVO

Traditional maintenance

- Focuses on individual sites
- Optimises for short-term operational spend
- Responds to issues after they occur
- Can allow cost, risk and technical debt to build over time

ISS Total Value of Ownership

- Takes a portfolio-wide view
- Connects OpEx, CapEx, risk, resilience and carbon considerations
- Helps prioritise where investment will create the greatest value
- Supports long-term asset stewardship, resilience and reduced total cost of ownership

When people make the difference

Some stories stay with you because they show what service means when it becomes personal.

A colleague turns back to help a patient. Another acts in seconds to save a life. Someone else protects a customer's critical systems before anyone feels the impact.

These are the moments recognised through ISS' Apple Award, a global programme celebrating colleagues who go beyond what is expected.

A hand to hold

Mhuba Hussen was on her way home after finishing her shift at The Royal Women's Hospital in Melbourne when the call came. A woman had arrived in labour, alone and unable to speak English. Staff knew Mhuba spoke the same language and asked if she could help.

She turned around and came straight back. "I just wanted to help," Mhuba says.

Given a pair of scrubs and rushed into the operating room, Mhuba stayed by the patient's side for five hours. She held her hand, spoke words she could understand and helped calm her fears,

staying with her until her baby was safely born.

Her kindness changed one woman's birth experience and became a powerful example of what placemaking means in healthcare: being present when people need safety, comfort and human connection most.

Mhuba's story has since travelled far beyond the hospital corridor. Recognised first in Australia and New Zealand, she was later named ISS' Global Apple Award winner, an honour celebrating the placemakers who bring our mission to life every day.



Mhuba Hussen
Patient Services Assistant at Royal Women's Hospital, ISS Australia & New Zealand

Watch Mhuba's story



Amanda Herrera Alvarez
Cleaning Specialist, Metro de Santiago, ISS Chile

Watch Amanda's story



The second that saved a life

Amanda Herrera Alvarez was finishing her shift at Metro de Santiago in Chile when she noticed a young woman on the platform behaving unusually. Amanda was about to board her train, but something made her stop. The woman seemed nervous, walking with her head down as another train approached.

Amanda stayed near her, and then everything happened in seconds.

As the woman moved to step in front of the approaching train, Amanda reacted immediately, reaching out, holding her firmly and guiding her away from the platform.

"I didn't think about anything," Amanda says. "The only thing I knew was that I didn't want her to go through with it."

Amanda's quick response helped save a life. Her actions show how much can depend on one person noticing what others might miss, and having the courage to act.

Amanda's story has since travelled beyond the platform at Metro de Santiago. After winning the Apple Award in Chile, she was nominated for ISS' Global Apple Award 2026, recognising a moment of courage that changed everything.

The failure no one felt

It was Friday evening when the cooling system in a critical server room failed. As temperatures rose, the risk of server outages, data loss and serious damage increased.

For Romano Scola, the urgency was immediately clear.

He went straight to the site, informed the relevant teams and took charge of the emergency response. With the cooling unit irreparably damaged, Romano put immediate cooling measures in place and coordinated further support.

After around six hours, the temperature increase was under control. Over the following months, he continued to oversee temporary solutions until a permanent technical solution was implemented.

His response helped protect a critical part of the customer's operations.

Romano's story shows the value of technical care: expertise, responsibility and sound judgement when it matters most.

For his initiative, expertise and commitment, Romano was named ISS Switzerland's Apple Award winner for 2026. ●



Romano Scola
Technical Caretaker, ISS Switzerland

Watch Romano's story



How EY is rethinking workplace performance

Can organisations improve workplace experience while reducing costs? EY Nordics shows you can

While many organisations continue to balance employee expectations against cost pressures, EY's Stockholm office delivers one of the highest workplace experience scores in EY's portfolio while operating with one of its most space-efficient footprints.

"You can combine better experience and lower cost," says Claus Christensen, Head of Workplace Experience & Workplace AI Innovation at EY Nordics. "But only if you do things differently."

Christensen's role spans workplace experience, facilities management, digital infrastructure and AI-driven innovation, giving him a front-row seat into how the workplace is evolving.

From service delivery to performance

Since the pandemic, EY has evolved its relationship with ISS from a traditional supplier model into a more outcome-driven Vested partnership, focused on shared value beyond transactional service delivery. Rather than focusing on operational inputs alone, success is measured against shared outcomes including workplace experience, cost efficiency and emissions reduction.

"We've evolved from a fairly

traditional contract to something more purpose-driven," Christensen says.

The shift reflects how EY increasingly views the workplace as a driver of productivity, wellbeing and collaboration.

He adds: "People are our most important asset." We try to maintain them in every way because we truly believe that leads to a better client experience."

Designing for behaviour, not just space

One of the clearest insights from EY's workplace analytics is the importance of social interaction. By analysing employee feedback and operational data, the organisation has found that informal moments such as coffee breaks, lunches and unplanned conversations can have an outsized impact on wellbeing and performance.

"It's not so much the lunch and the coffee," Christensen says. "It's more about how we create a cool experience around it."

One simple initiative involved placing healthy snacks around office spaces to encourage employees to step away from their

desks and connect with colleagues. For Christensen, this highlights an opportunity for FM to shape how people experience work, not just how buildings operate.

Trust, flexibility and the office

EY's Nordic hybrid model is intentionally non-prescriptive. Employees are not required to spend a fixed number of days in the office; instead, teams decide together what works best.

"We have an empowerment model. You figure it out together with your team and your leaders," Christensen explains.

Importantly, the Nordics saw a smaller drop in office attendance than more prescriptive regions within EY globally. At the same time, flexibility has become a recruitment advantage in a competitive talent market.

The workplace itself is designed to reinforce that experience. Nordic EY offices lean into Scandinavian design principles, with softer environments, social spaces and visible sustainability choices integrated into the visitor journey.



We try to design the experience to cater for candidates. We want people to feel the vibe."

AI, data and the future workplace

"The future of workplace experience is really tied to AI," Christensen says.

At EY, AI is expected to change the way people work far more profoundly than COVID-19 did. While COVID-19 mainly questioned where people work, AI will transform how work gets done, and that shift is already under way.

But AI will not only change work itself, but it will also change how workplaces support work. For Christensen, this creates a "double disruption" for the workplace industry.

AI is reshaping how work gets done by shifting people from execution towards higher-order human skills such as judgement, creativity, ethics and decision-making, while automating more repeatable tasks. As a result, the purpose of the office will continue to evolve towards a place for teaming, creativity, learning, human connection and restoration.

At EY, data is already being used to optimise workplace density, understand occupancy patterns and improve user experience. EY is also prototyping new AI-enabled tools to augment and empower workplace leaders, operations teams and partners such as ISS with predictive, actionable insights that can coach and support people.

"The long game for us is to build a digital twin of the workplace, not just the buildings, but also the people, their behaviours and experiences," Christensen says. "This digital twin will sit at the centre of many future use cases, from digital AI to physical AI, including drones and robots."

For Christensen, the future workplace will be shaped by how well organisations combine technology, data and human understanding to create environments that help people perform, connect and thrive. ●



Claus Frigaard Christensen

Head of Workplace Experience & Workplace AI Innovation

Claus leads EY Nordics' Workplace Experience function, including its Vested partnership with ISS. He also drives global workplace experience pilots across EY, with a focus on AI-enabled insights and digital user experience. He brings more than 20 years' experience across management consulting, FM supplier roles and buyer-side leadership.

The Welcome that shapes the whole experience

As organisations work harder to make the workplace worth the journey, one of the most influential touchpoints is also one of the easiest to underestimate.

ISS' workplace experience benchmark shows that "Friendliness of the reception staff" is the best-performing service across 21 measured touchpoints, scoring 4.20 out of 5. "I feel welcome when entering the building" and "Atmosphere at the reception" both score 4.03. Based on over 135,000 responses and more than 3.4 million data points from 2019 to 2025, the message is clear: people notice when reception works well.

The workplace has to earn the commute

In a hybrid world, the workplace is no longer the default setting for every task. For many employees, the day starts with a decision: is it worth coming in?

That changes the role of every workplace touchpoint. Arrival, navigation, meetings, food, support services and informal interactions all shape whether time on site feels purposeful. Reception sits at the centre of many of these moments. It is where people are welcomed, guided, reassured and connected to the support they need.

From first impression to everyday confidence

Reception is often described as the first impression of an organisation, but that

understates its role. For employees, it can provide clarity and practical help. For visitors and customers, it can build confidence before a meeting begins. For workplace leaders, it is a visible expression of culture, service quality and care.

The challenge is that reception is still often treated as a front desk function rather than a strategic workplace service. Trusted individuals may know the building, the people and the routines, but that familiarity can become fragile when demand changes, events require more support or service levels need to be aligned across multiple sites.

What stronger reception really depends on

A strong reception experience is not created by friendliness alone.

The shift in thinking

Traditional view

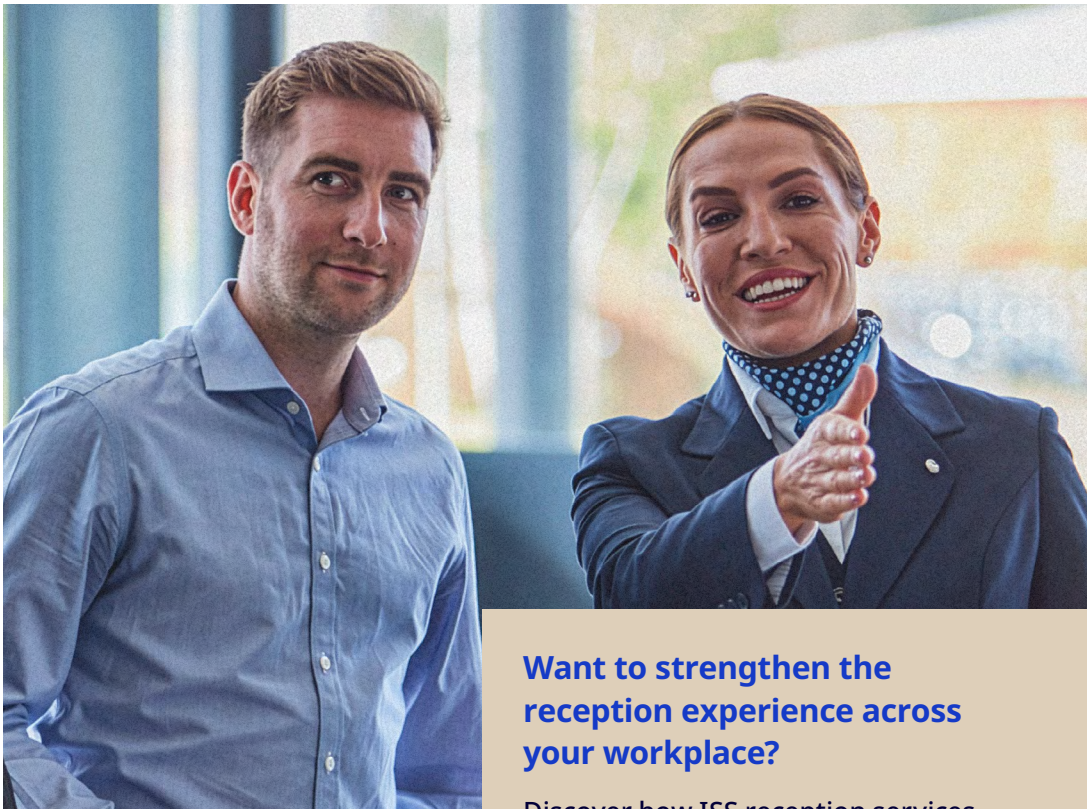
Reception as a desk at the entrance.



Strategic view



Reception as a human service layer across the workplace day.



Want to strengthen the reception experience across your workplace?

Discover how ISS reception services can help you deliver a warm welcome and trusted support throughout the day.

Learn more



It depends on the operating model behind the welcome: trained people, clear standards, reliable coverage, service governance and the ability to adapt to the daily rhythm of the workplace.

This matters because reception teams often become the people others turn to when something is unclear, unexpected or urgent. They help visitors find their way, support meetings, answer questions and reduce the small frictions that can shape how a workplace feels.

Strengthening a trusted touchpoint

ISS' Welcome Plus service concept is designed to help customers strengthen reception as part of a more consistent and connected workplace experience. The focus is on combining human warmth with the structure needed to deliver reliably across changing workplace needs.

For customers moving from an in-house model, continuity matters. Receptionists are often trusted faces in the workplace, so change needs to protect the human connection people already value while giving teams stronger support, development and a broader workplace experience community.

When reception is warm, reliable and professionally supported, it does more than open the door. It helps shape a workplace experience employees can trust and value, while giving visitors a welcome that feels professional, supportive and unmistakably aligned with the organisation. ●

Good safety is good business

Strong safety cultures protect people, but their value reaches further. When safety is embedded in how work is led, delivered and improved every day, it strengthens trust, performance, resilience and long-term business outcomes.

Safety as a business multiplier

Good safety starts with a simple moral responsibility: **people should go home safe at the end of every working day**. For organisations managing large, complex and often multinational workplaces, this responsibility is inseparable from business performance.

A strong safety culture helps reduce disruption, build confidence and create more stable operations. It supports compliance, protects reputation and contributes to healthier, more engaged teams. The business case is increasingly visible: **as recent research into workplace prevention links safety and health measures to positive economic outcomes, including reduced absence, productivity gains and lower disruption.**¹

Put simply, good safety does more than prevent things from going wrong. It creates the conditions for work to be done better: with greater confidence, consistency and care.

From safety programme to safety culture

Traditional safety management often focuses on what has already happened. Incidents are recorded, causes are reviewed and corrective actions are put in place. This remains essential, but it is only one part of a more mature safety approach.

The next shift is further upstream. It asks whether people feel able to speak openly, whether leaders listen, whether learnings are shared and whether safety standards are understood across every site. This is where psychological safety becomes important. In practical terms, **it means creating an environment where people can raise concerns, identify hazards and contribute ideas with confidence that they will be heard.**

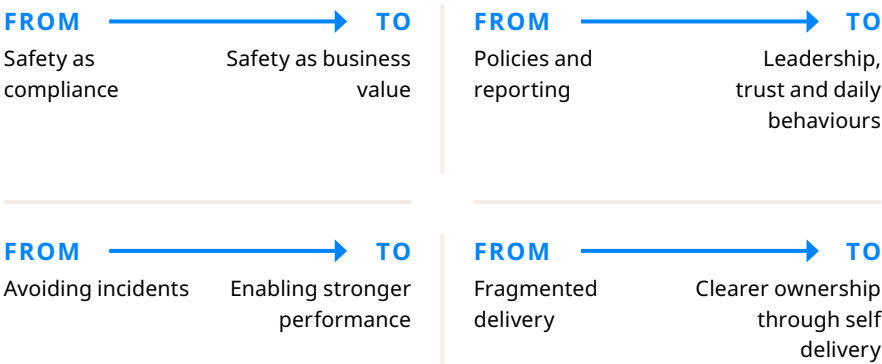
ISS' "Creating SAFE Spaces Together" approach reflects this wider shift. SAFE stands for Speak Openly, Act Safely, Focus on Learnings and Engage with Others, placing behaviour, trust and learning at the centre of prevention.

For ISS, this is more than a safety framework. It reflects a culture where safety is embedded in the way services are led, delivered and improved every

day. From frontline teams to global leadership, **the aim is to make safe behaviour part of everyday decision-making, rather than an activity that sits separately from the work itself.**



The shift in safety thinking



Why self delivery matters

For multinational customers, safety can be made more complex by different regulations, operating models, supply chains and local practices. **Where services are delivered directly, there is a clearer line of sight between safety intent and day-to-day behaviour.**

Self delivery matters because culture is shaped at the point of service. When the same organisation sets the standards, develops the culture and delivers the work, safety can become part of daily routines more naturally. Learnings can move faster across locations, frontline teams can contribute more actively and customers gain greater confidence that safety is being lived, not only managed.

Creating value through safer spaces

When safety culture is strong, its impact can be felt across the business. It helps customers operate with greater confidence, supports employee engagement and reduces the disruptions that affect productivity, quality and continuity.

That is why safety sits so naturally within the wider purpose of the workplace. Safe spaces help people thrive, and when people thrive, businesses are better placed to perform. For ISS, Creating SAFE Spaces Together is therefore not only a safety ambition. It is part of how value is created for customers, people and the business every day. ●



Mads Holm
GROUP CFO, ISS

Creating SAFE Spaces Together starts with a culture where everyone looks out for one another and feels confident to speak up when something does not feel right.

In this personal video, **Mads Holm**, Group CFO, shares a moment when one of our placemakers stepped in as he was about to act unsafely, not to criticise but to help.



¹ Thonon et al., "Return on investment of workplace-based prevention interventions: a systematic review", European Journal of Public Health, 2023.

Where social sustainability creates business value

Few environments influence people's daily lives more than the workplace. It is where skills are developed, careers progress and communities connect.

Because of that influence, organisations have an opportunity to create value beyond business performance alone. They can support inclusion, skills development and social mobility through the way workplaces are operated and experienced, while strengthening their own business objectives.

Strong social outcomes can support talent attraction and retention, strengthen employee engagement and demonstrate measurable progress against ESG commitments.

The workplace as a social catalyst

Through its workforce, supply chains and community partnerships, ISS helps customers widen participation for people from a broad range of backgrounds, experiences and circumstances.

This can be particularly valuable for organisations with highly specialised or knowledge-based workforces, where the nature of the roles available may limit recruitment from a broad cross-section of society. Through its diverse range of roles, recruitment networks and career pathways, ISS can reach and employ talent that might otherwise be underrepresented in these workplace environments.

Customers benefit from new perspectives, skills and experiences that help create more dynamic and engaging places to work. This extends the social impact of the workplace beyond the customer's direct employee population, strengthening local community connections and supporting social cohesion.



Turning social value into business value

Facilities management has a unique position at the intersection of people, workplaces and communities. By connecting services, people and operations, ISS helps customers translate social sustainability ambitions into measurable outcomes. This can include creating pathways into employment, supporting skills development, promoting fair employment practices and opening opportunities for people who may otherwise face barriers to work.

At a time when organisations face growing expectations from employees, investors and society, social value provides evidence of the broader impact being created through business operations and partnerships. It helps turn social sustainability from an aspiration into tangible business value.

The most effective partnerships take a long-term view. By starting with clear goals, agreed measures of success and regular dialogue, customers and ISS can create impact that is visible not only in reporting, but also in stronger employee engagement, deeper community connections and lasting social value. →



Our role is to help customers create measurable social value through their people, workplaces and communities, while providing the evidence needed to understand, demonstrate and strengthen that impact over time."

Margot Slattery
SOCIAL VALUE AND INCLUSION
AMBASSADOR, ISS A/S





From commitment to evidence

Creating social value is only part of the challenge, as organisations also need to understand and demonstrate the impact they are creating for people and communities.

With more than 330,000 placemakers worldwide, ISS sees every day how workplaces can create opportunity, strengthen communities and support social mobility. By measuring these outcomes consistently and at scale, ISS helps customers understand the value being created through their workplaces, supply chains and community partnerships.

How can the workplace strengthen local communities?

When a customer opened a new site in an economically disadvantaged area, local planning commitments included creating employment opportunities within the surrounding community. However, many of the customer's own roles required specialist technical expertise, meaning much of its recruitment would come from outside the local area. ISS helped bridge that gap. By recruiting service staff locally, identifying community-based suppliers and creating training pathways for local residents, ISS enabled the customer to create tangible social value through the workplace.

How can the workplace unlock overlooked talent?

At a consulting customer's office, ISS trained and employed a team of deaf baristas to operate the workplace coffee bar. Interactive displays help employees learn basic sign language for ordering, creating a more inclusive workplace experience while opening career opportunities for talented individuals who are often overlooked in traditional recruitment processes. Through its specialist expertise, recruitment networks and tailored training programmes, ISS was able to access talent pools that the customer would have been unlikely to reach directly. The result is a workplace experience that strengthens inclusion and belonging while creating meaningful employment opportunities.

How can the workplace bring inclusion to life?

At the headquarters of a global engineering company, ISS provides cleaning services through a team where 65% of employees have different abilities, with nearly 70% of those living with severe disabilities. Working closely with the customer, ISS creates meaningful employment opportunities while providing the support and workplace adaptations people need to thrive in their roles.

The partnership makes inclusion a visible part of everyday workplace life, bringing a broader range of skills, experiences and perspectives into the workplace. As the customer puts it, the ambition is to reach a point where "inclusion is no longer seen as noteworthy because it has become a natural part of workplace life."

As economies and communities evolve, not everyone benefits equally. Inclusive employment, skills development and community investment remain important opportunities for organisations that want to create lasting value beyond their own workforce.

Scaling impact together

Social sustainability creates the greatest value when organisations, suppliers and communities work towards shared outcomes, particularly when those efforts can be scaled across locations and markets.

ISS' approach helps customers build a more consistent picture of social value across countries while recognising local needs and opportunities. The result is stronger workplaces, greater opportunity for people and more resilient communities.

The most successful partnerships recognise that social value is not created in isolation. When customers and providers work together around shared ambitions, the workplace can become a catalyst for inclusion, skills development and social mobility, creating lasting value for people, organisations and society.

Making it visible helps organisations understand what is working, where opportunities remain and how successful approaches can be scaled over time. By combining meaningful outcomes with consistent measurement, ISS helps customers turn social sustainability from an aspiration into a measurable driver of lasting value for people, communities and business. ●



From commitment to evidence: Social sustainability at ISS

- More than 120,000 recognised qualifications delivered to placemakers or their family members
- Target of 350,000 qualifications by 2030
- Expanded living wage assessments across multiple markets
- Partnership with Social Value Portal to measure impact across people, communities and the wider economy
- A distinctive global approach to measuring social impact across countries, contracts and communities

Want to learn more about social sustainability at ISS?

Scan the QR code





The workplace is where Net Zero becomes operational

Net Zero needs a place to happen

Net Zero is often discussed through targets, reporting frameworks and transition plans. Yet progress is made in far more practical places: plant rooms, lighting schedules, waste areas, catering operations, loading bays and maintenance routines.

This is why the workplace deserves more attention, as it is where energy is used, materials are consumed, assets are maintained, waste is handled and service decisions are made every day.

For many organisations, facilities management is one of the closest routes from sustainability ambition to measurable action.

The first lever is control

A workplace cannot improve what it cannot see, and many estates still depend on partial data, fixed schedules and legacy assumptions about how buildings behave.

Energy optimisation is often the quickest place to start. For an international banking customer, a multi-year Building Optimisation Programme began in 2022 across 61 sites in 11 countries, using utility data, building controls, plant reviews and site insight to identify practical conservation measures. In its first four

years, the programme delivered **45.6GWh in energy savings**, **£9.2 million in cost savings** and **8,396tCO₂e avoided**, according to ISS internal case study data.

While every facility may not deliver the same numbers, the lesson learnt is that existing buildings often contain avoidable waste before major capital investment is needed.

Some sites can do more than consume

Once energy use is understood, some estates can go further by producing a proportion of their own renewable power.

For a telecommunication customer, ISS supported on-site solar generation as part of a wider workplace energy improvement programme. The installation generates **1,289,700 kWh a year** and reduces emissions by **542 tonnes CO₂e annually**.

That changes how a site is viewed as it becomes part of the organisation's energy strategy, not simply a source of demand. →

Why Net Zero runs through the workplace

37%

Buildings and construction account for around 37% of global CO₂ emissions.

50%

The sector is responsible for nearly 50% of global material extraction.

What this means for FM

Energy, assets, waste, materials, maintenance and supplier decisions sit close to daily workplace operations. That makes FM a practical route to turn Net Zero ambition into measurable progress.

Source: UNEP and GlobalABC, Global Status Report for Buildings and Construction 2025–2026, United Nations Environment Programme, 19 May 2026.



What organisations should ask next

The most useful starting point is a sharper view of the estate itself:

- Where is energy being wasted?
- Which sites could produce renewable power on-site?
- How well are waste streams being segregated, recycled and recovered?
- Which assets should be repaired before they are replaced?
- Which FM decisions should include carbon alongside cost?

When those answers are visible, Net Zero becomes easier to manage and it moves from corporate promise to operational practice.

Waste is a systems issue

Waste performance is often treated as a bin problem. In practice, it depends on behaviour, segregation, collection patterns, recycling routes and the quality of data behind them.

In one banking sector example, ISS retrofitted **148 waste sensors** across two corporate sites. Segregation efficiency improved by **83%**, while bins were found to be emptied at **49% capacity**, creating opportunities to improve recycling performance, reduce unnecessary collections and strengthen cost control.

The value is in the visibility, as better data turns waste from a vague environmental concern into an operational performance issue.

The credibility test

A critical eye should be applied to any Net Zero pathway claim. Is the baseline clear? Is the data reliable? Are the outcomes material? Can the progress be repeated across different sites?

Those questions matter because workplace sustainability is strongest when it links environmental progress with operational discipline. ●



Credibility starts with transparency

ISS' 2025 EcoVadis submission achieved a Gold medal, benchmarked against companies in the combined facilities industry.

EcoVadis evaluates companies across four areas: environment, labour and human rights, ethics and sustainable procurement, providing an independent view of how organisations perform against global standards. Achieving Gold places ISS among the top 5% of all rated companies.

Alongside this achievement, ISS has received a B score in the 2025 CDP Climate questionnaire and an A rating for CDP's Supplier Engagement Assessment, reflecting strong governance, disclosure and action across our value chain.





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WORKPLACE [R]EVOLUTION

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