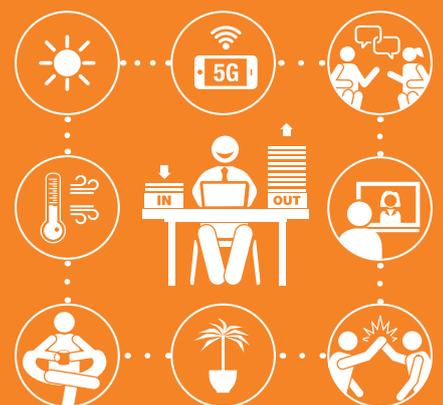


INSIGHTS 2018

PROCUREMENT, PEOPLE AND PRODUCTIVITY

A new dawn for
the workplace?





Ross Abbate
Group Managing Director of Mace Macro

Ross Abbate is the Group Managing Director of Mace Macro; the facilities management arm of Mace.

After initially training to be an electrical engineer, Ross' career in FM started when he moved to the UK and began a role that involved installing access control systems. His subsequent roles developed and his career progressed when in 2007 Ross joined Mace Macro as a Business Development Manager.

In 2009 he was made a Director, and oversaw the bidding process for Invesco Americas, a key contract win which saw Mace enter the US for the first time, paving the way for growth within the region. In 2015, he became Managing Director, focusing on the business' culture of delivering and growing through superior customer services.

Ross' vision for Mace Macro is to develop the workplace experience that FM clients' desire, identifying the shifting trends within the industry and creating a bespoke solution that addresses key workplace needs.

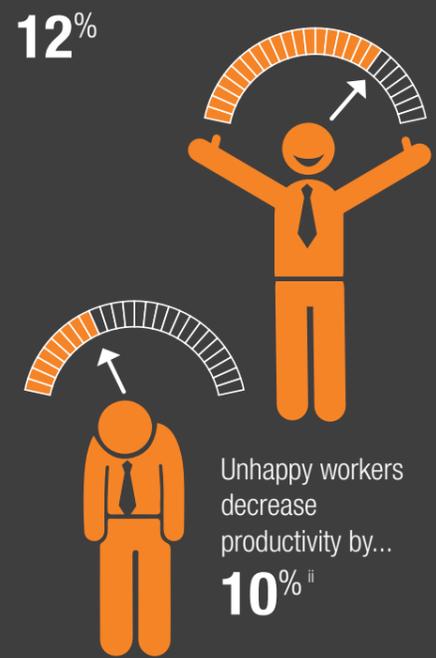
He has over 20 years' experience working within the FM industry and has led the company through an impressive transformation – expanding its service offer, taking Mace Macro into over 30 countries and continually growing the headcount and turnover.

Outside of his day job, Ross sits on the Institute of Workplace and Facilities Management (IWFM) judging panel, as lead Judge for their Innovation in Technology and Systems category.

The facilities management industry has been estimated to contribute up to...



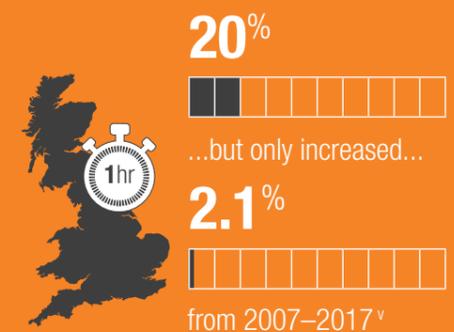
Happy workers increase productivity by...



Output per hour (£ million) in services by region in 2016



From 1997–2007, UK output per hour increased...



FOREWORD

Our industry needs to have a better conversation about how the workplace experience affects employee productivity. While some have enthusiastically promoted the subject for years, more generally it has been undervalued, ignored or not understood. The result has been that too often – and some would say increasingly often – workplace procurement focuses too narrowly on minimising cost.

This report has been written to challenge employers, the property and construction industry, landlords and policymakers to think differently about the workplace experience. We know it is tough to change cultures, conventional wisdom and deeply ingrained working practices. But the way to do it is to make reasoned arguments.

The argument set out in the following chapters is a simple one – investment in the workplace experience has the potential to raise employees' productivity, helping an organisation to realise its objectives. This is supported by both theory and evidence.

Polling conducted for this report by Populus showed that around one in eight workers across the UK are in workplaces which hamper them doing their jobs efficiently. This has a significant cost to the bottom line in terms of lost output, which we calculate to be around £4bn every year. A substantial drag on company profits and economic performance.

There is not a one-size-fits-all solution, however. Each organisation is different, meaning that the productive output gained from an investment in the workplace

experience will vary. It is ultimately employers that have to make a judgement about the needs of their employees, and how meeting those needs translate into output. That said, we can point to economic, societal and technological trends that we think will have a profound effect on the workplace experience.

The changing nature of employment – represented by the growth in the self-employed and independent contractors – requires us to think differently about how workplace interactions occur, and what type of workplaces are needed. The greater understanding of how the workplace affects wellbeing and mental health will add a new dimension to how we design, maintain and repair buildings. The advent of fourth industrial revolution technologies, such as the Internet of Things, has the potential to tell us more about the workplace experience than ever before.

In summary, we need to place more importance on the workplace experience, the requirements of which are being shaped by an ever-changing world. As the opening paragraph of this report makes clear, failure to do so would mean another opportunity lost to boost business performance and the economy.

Only one in two employees think that their workplace enables them to be productive.ⁱ This represents a colossal missed opportunity to boost both business performance and economic growth.

To avoid this opportunity being missed in the future we need to change attitudes to designing, building, refurbishing, repairing and procuring workplaces. In short, the link between an employee's workplace experience and their productive output is too often undervalued, ignored or not understood.

Changing attitudes will not be easy. Like so many examples of poor outcomes in the property and construction industry, deeply ingrained cultures and ways of working prevent change from happening.

We hope that this report will help in some way to change that culture by encouraging people to think differently about the importance of the workplace experience and how that fits into the context of a rapidly changing world – whether demographically or technologically.

Who should care?

Designing the workplace experience to maximise employee productivity is something that a broad range of organisations should care about. In particular we consider four categories:

1. Employers should care because creating a better workplace experience could mean getting more from existing employees, having better rates of workforce retention and attracting the most talented workers which

all can improve profitability. Previous studies have found that happy workers increase productivity by 12%, whereas unhappy workers decrease productivity by 10%.ⁱⁱ

2. The property and construction industry wants to build and maintain buildings that create a positive experience for the people using them. Specifically, architects and facilities management professionals can recognise and encourage the idea that the workplace experience influences employee productivity. The facilities management industry has been estimated to contribute up to 8% of GDP annuallyⁱⁱⁱ – it could be contributing more if it focusses more on workplace experience.

3. Property developers and landlords of commercial property may consider how producing a good workplace experience could increase demand for their commercial space and its value. 55% of the UK's commercial property is rented, rather than owned by occupiers.^{iv}

4. Policymakers have recently focussed on the UK's poor productivity performance. UK output per hour increased by 20% between Q4 1997 and Q4 2007 compared to only 2.1% between Q4 2007 and Q4 2017.^v The workplace experience is almost completely ignored in the debate about the potential solutions.

If these groups are to show that they care, it will ultimately be reflected in procurement practices. Employers will procure better workspaces, the property and construction industry will procure better buildings, developers and landlords will procure better repairs, maintenance and refurbishment, and policymakers will change procurement rules

More generally, and as is discussed in this report, workplaces have a bearing on the wellbeing and mental health of the people that use them. Given that 86% of the UK's workers have a workplace separate from their home, there are millions of people that on a daily basis experience a workplace that they have little or no control over.^{vi} This means we should all care about making the workplace experience the best it can possibly be.

If the link between productivity and workplace is that clear cut, why isn't improving the workplace experience treated as a priority within every business of the UK?

A big part of the answer seems to be that the returns on investing in the workplace experience are not simple to measure and many businesses understandably have a culture which prioritises the easy to quantify. While a manufacturer can reasonably forecast how a new piece of machinery will improve its bottom line, the same cannot be said as easily of an accountancy firm procuring new windows in its head office to get more natural light.

But just because there are intangible returns on an investment, does not mean that investment in the workplace experience should be dismissed. Year after year organisations allocate budgets to activity that aims to improve performance, without being able to measure precisely how performance improves. Whether it is manager training, appraisal systems or things to make employees feel good.

The reason that organisations are more accepting of expenditure on these types of activity is because over time a culture has been created where they recognise that, although hard to directly measure, they bring about business benefits. In the rest of this report we make the case for businesses to place greater value on investment in the workplace experience as a way of improving profitability and productivity.

Over the following pages we build an argument about the workplace experience and employee productivity using the following three steps:

1. Setting out the broad principles for creating a workplace experience – and how work, society and technological trends could affect what we understand as the workplace experience.
2. Presenting the theory behind the returns on investment in the workplace experience.
3. Explaining what 1 and 2 above means to organisations.

Only...
50%
of employees agree their workplace enables them to be productiveⁱ



Only...
14%
of the UK workforce work from home^{vi}



From 2015–2016
55%
of adults aged 16 and over reported that they were mostly or completely satisfied with their job^{xxi}



People have been thinking about how to maximise efficiency in workplaces for thousands of years.^{vii} Over the last century in particular, workplace design has evolved in response to the ideas of leading business schools and the fact that large swathes of economic activity moved from an industrial base to a knowledge base.

The link between the workplace experience and productivity performance, therefore, is by no means a new discovery. For a long time there has been forward-thinking organisations taking the workplace experience seriously, generating case studies of good practice. But these organisations seem to be the exception rather than the rule.

That said, there is no off-the-peg solution to creating a productivity-maximising workplace experience. No individual sector, country or building type can be regarded as a leader in providing a good workplace experience.^{viii} Ultimately, it is down to individual organisations to work out what works for their people and culture. Although there are two general principles which can form the foundations of a better workplace experience.

Firstly, understand the needs of employees. Whilst perhaps an obvious statement, different organisations will have different objectives, and will need employees to perform different functions when trying to meet these objectives. For instance, a global tech company trying to attract the best and brightest coders will probably want to offer a very different workplace experience from that of a small

catering company that primarily uses agency staff. It also worth noting that the needs of employees relate to both the functioning of a building (for example, if the lifts work as they should) and what the experience is at a work station (such as access to suitable lighting).

Secondly, get the basics right. There are some fundamentals of a good workplace experience that are important regardless of organisational objective. For instance, 79% of employees globally rank tea, coffee and other refreshment facilities as an important workplace feature; 44% of employees around the globe state that learning from others is an important work activity; less than a third of employees around the globe are satisfied with workplace noise levels.^{ix} These basics can sometimes be forgotten with well-intentioned efforts to create great workplaces. For example, the bean bags and ping pong tables associated with firms in the creative sector could be counter-productive if it means less comfort and more distraction.

Both the above general principles evolve over time – in other words, employee needs and the basics change. Take digital connectivity as an example. It is now a minimum requirement in the large majority of workplaces, whereas twenty years ago this wasn't the case.

44% of employees around the globe state that learning from others is an important work activity^{ix}



79% of employees globally rank tea, coffee and other refreshment facilities as an important workplace feature^{ix}



Globally, nearly 70% of employees are not satisfied with workplace noise levels^{ix}



The number of self-employed people has increased from...



in 2001 (12% of the labour force) to...



in 2017 (15% of the labour force)^x

4.4% of the population have worked in the gig economy in the last year, roughly...



Between 2008 and 2016 the number of freelancers increased by...



What are the current trends that will influence the future needs of employees and the future basic requirements within the workplace? It is, of course, always difficult to predict these things, especially given the rate of change that the world is experiencing. Nonetheless, the way work is changing, how societal attitudes are shifting and how technology is progressing are strong forces that are already altering the face of the workplace.

The changing nature of work
The statistics showing how the UK's labour market has changed – and is still changing – are remarkable:

- The number of self-employed increased from 3.3 million people (12% of the labour force) in 2001 to 4.8 million (around 15% of the labour force) in 2017.^x
- 4.4 per cent of the population have worked in the gig economy in the last year, roughly 2.8 million people.^{xi}
- Between 2008 and 2016 the number of freelancers increased by 43%.^{xii}

These trends have two big implications for the employers.

The first is that companies need to create new – or adapt existing – workforce strategies to manage their use of independent contractors (or anyone who is doing work for them, but who is not directly employed). In terms of creating a workplace experience that is conducive to productive output this might mean ensuring independent contractors have easy access to adequate desk space and to IT systems when

necessary. Many people have experienced how unwelcoming it feels to turn up at a new workplace to not have the basics in place.

The second is that new types of workplaces need to be created to accommodate new ways of working. We can already see this happening through the proliferation of co-working spaces. Look at how WeWork or Bruntwood – two of the most high-profile and successful providers of co-working space – promotes the use of their buildings. The focuses on the strength of internet connections, office furniture, the refreshments and the facilitation of knowledge exchange are key parts of their marketing.^{xiii} In other words, they understand the needs of the people within the building and are getting the basics right.

Millennials or wellbeing – what matters more?

Observable shifts in societal attitudes will not always have consequences for what employees want from their workplace experience.

The preoccupation with what younger people want from life – often in the context of the generation born between 1980 and 1995, labelled as “millennials” – is a case in point. It is unquestionably true that the views of younger people on issues like religion and climate change tend to differ from the views of older people.^{xiv} It is also unquestionably true that younger people approach employment in different ways to older people, such as changing jobs more frequently (a pattern that has been repeated across the labour market for several generations).^{xv}

Despite these differences, there is no compelling evidence to suggest that organisations should think about the workplace experience in terms of pleasing younger employees.^{xvi} In fact, there is good evidence that suggests quite the opposite. Only 12% of those employed in the UK are under the age of 25, and they tend to have less complex work patterns and requirements than older workers, which means it is easier to cater for their workplace needs.^{xvii}

So, in what ways will a changing society impact on the creation of what is regarded as a good workplace experience? The answer is: where the evidence is strong enough to require a change being made. A good example is society's better recognition of the importance of mental health and wellbeing.

There is a growing body of work that makes clear the link between happiness, productivity and the workplace environment. Not only can the workplace experience help people to be happy, it can also help mitigate stress and anxiety caused by other things in life, such as stress and anxiety caused by financial concerns.^{xxiv}

The government is increasingly directing resources towards understanding and treating mental health issues, and has recognised that the workplace is important to mental health outcomes:

"The workplace provides an important opportunity for people to build resilience, develop social networks and develop their own mental capital".^{xviii}

Aside from the human cost of this, there is a huge economic cost if this is left ignored. Presenteeism (where employees work but are under-productive due to poor emotional wellbeing) costs the UK economy £15bn annually.^{xix}

In short, as we learn more about how workplaces can affect wellbeing and mental health, the more it will influence our understanding of employee needs and the workplace experience basics.

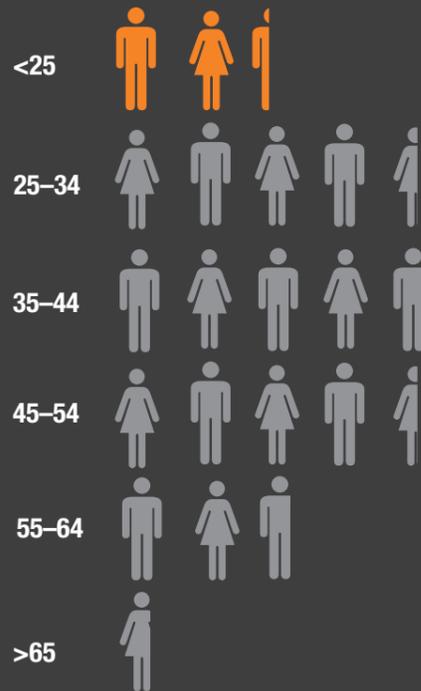
Technological progress

There is a long list of technologies that have fundamentally altered the way that workplaces are built and how they are provided. These technologies are many and varied, from the adoption and use of the passenger elevator to the widespread use of communication via email. New technologies will continue to alter the workplace experience in the future.

Perhaps the most interesting technology to currently be influencing the workplace experience is the Internet of Things, that creates so-called "smart buildings". These buildings use sensors to create a better understanding of the utilisation of space, the control of temperature and security than there has ever been before.^{xx}

In other words, sensor technology allows building and office managers to better understand employee needs and arising workplace experience issues better than ever before.

Only...
12%
of those employed in the UK are under the age of 25^{xvii}



Presenteeism (where employees work, but are under-productive due to poor emotional wellbeing) costs the UK economy...

£15bn
annually^{xix}



RETURNS ON INVESTMENT IN THE WORKPLACE EXPERIENCE

What would an organisation gain from making a productivity-enhancing investment in the workplace experience? Research undertaken by Leesman – a firm that specialises in understanding the workplace experience – gives us an idea.

Leesman surveys employees around the world to find out about their workplace experience. The data gathered from this exercise means that we can quantify the difference between the best and worst employee workplace experiences.

The table opposite presents the percentage of employees responding to the Leesman survey who agree with statements that are relevant to workplace productivity.^{xxi} The employees responding all belong to organisations with more than 500 people.

The results in the table show that the difference between the best and worst organisations at providing a workplace experience is vast. The responses to statements about enabling individuals and teams to work productively are good examples. Less than 15% of employees in the best performing organisations think that their workplace experience prevents them from working productively; in the worst performing organisations this figure more than triples.

There are some individual results worth noting. Even for the best performing organisations, a fifth of employees do not agree that the workplace experience contributes to a sense of community at work.

Table 1: Leesman survey data, % of employees agreeing with statements

Statement	% agreeing for organisations that are the best at providing a workplace experience	% agreeing for organisations that are the worst at providing a workplace experience
It contributes to a sense of community at work	79.4%	53.8%
It creates an enjoyable environment to work in	84.4%	53.9%
It enables me to work productively	86.4%	51.5%
It enables us to work productively	86.4%	50.9%
It supports me sharing ideas/knowledge amongst colleagues	86.0%	62.8%
Average	84.5%	54.6%

And even for the worst performing organisations, more than three-fifths of employees agree that their workplace experience supports the sharing of ideas/knowledge amongst colleagues.

What do these results mean for employee productivity? While we can't say definitively, we can illustrate an answer using known differences in output per hour. For instance, London's output per hour is 31.5% higher than the UK average. **If the best workplace experience equates to employee output that is 31.5% higher than the average workplace experience it would be worth £79m in turnover to the average large UK firm.**

This is an extremely simplified way of thinking about the issue, but it makes the point from a theoretical perspective.

In reality, if a company is going to make an investment in its workplace experience, then there comes a point at which further investment will no longer yield gains to employee output and productivity. In short, the company has to consider what additional output it is getting from the additional input of investing in the workplace experience.

Chart 1

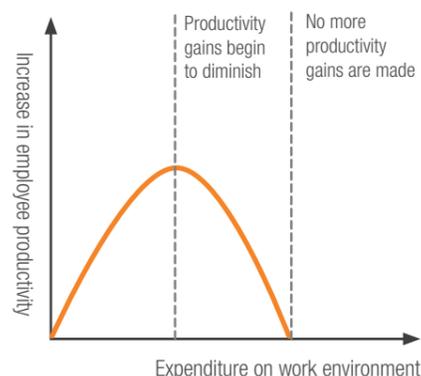
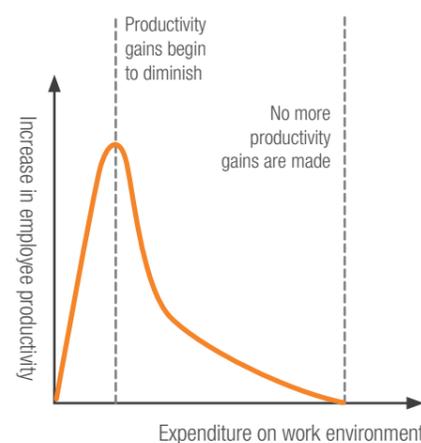


Chart One outlines the basic consideration for how investment in the workplace experience relates to productivity gains. As investment in the workplace experience occurs, it has a positive impact on employee output – as long as the additional output employees produce is greater than the additional input of investment in the workplace experience then a productivity gain will materialise. These productivity gains will eventually reach a peak, before beginning to diminish. Eventually, the input of investment in the workplace experience ceases to create a positive impact on employee output.

Chart 2

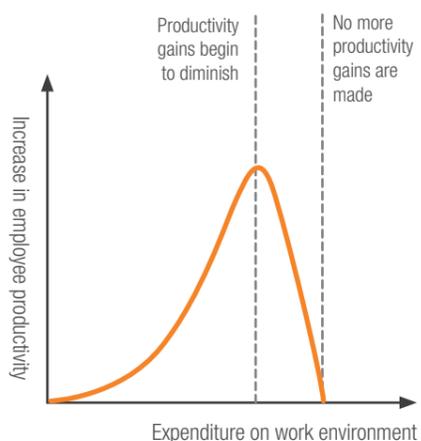


While Chart One explains the basic concept, the shape of the relationship between investment in the workplace experience and employee output could be very different. Charts Two and Three, below, show what different relationships might look like.

Chart Two suggests that there is a big impact on productivity in response to lower levels of investment in the workplace experience, before the productivity gains diminish very gradually with increased investment.

Chart Three suggests that the productivity impact responds more gradually to investment in the workplace experience, and then diminishes quite rapidly.

Chart 3



There are countless other charts that would show countless other hypothetical relationships between investment in the workplace experience and employee output and productivity. The different shapes will depend upon the many variables affecting each individual business.

So, while the above exercise will not shed light on exactly how investment in the workplace experience relates to employee output and productivity, it does illustrate how the relationship works.

All of the above may seem obvious to some, but given the lack of recognition of the relationship it is worth spelling out.

Improving workplace experience could add...



Workplace is the top factor of strategic relevance to facilities management professionals xxiii



WHAT DOES THIS ALL MEAN?

We commissioned representative polling from well-respected polling firm Populus to further evidence the lost opportunities for business and the wider economy. Our new research shows that workers lose an average of 2.4 hours a week due to unproductive workplace environments. Which equates to around one in eight employees at a cost of £4bn in lost output every year to the UK economy. These powerful new statistics coupled with the macroeconomic problem of the UK's flagging productivity, we can see immediately why the subject of this report is so important. Some workplaces are clearly in urgent need of improvement to facilitate employee productivity, and not doing so not only harms our economy overall, it costs each and every business the opportunity to boost its profitability.

The big issue discussed in this report is the challenge of low awareness of the fundamental link between an employee's workplace environment and their productive output. Put simply, the culture surrounding procuring workplaces are stuck in the past and they need to change.

This report has therefore sought to help tackle that challenge: to demonstrate the importance of the problem, but also to highlight the good news that we already have the tools and technologies at our disposal to make this positive change. And even better, when we do make change, this report has demonstrated that the potential costs of making workplace improvements are outweighed by the benefits that flow from that action.

Implications and call for action:

The world of work is evolving fast, driven by shifting societal attitudes and technological innovations that change what we consider the basic necessities of workplaces to be. The failure of too many employers, designers, policymakers and others to keep up with that change, in terms of improving workplace experience, is the key issue. This must be understood not as a luxury, or a cost that can be put off due to affordability; it is an action that cannot, on any logical grounds, be ignored.

The implications for action are therefore:

- **Gain business-level metrics:** understanding what employees need is the starting point and this responsibility is with employers, who should focus on getting the basics right; asking employees directly about measures that would improve their ability to get their job done comfortably and efficiently.
- **Planning and cost-benefit analysis:** informed by a comprehensive employee survey, employers should use cost information on workplace improvements to assess which will deliver most productive value in terms of the workplace experience. This report has highlighted some key themes, but consultancies like Mace offer specialist project management expertise that can help on this.

- **Raising awareness across the sector:** given the construction industry is facing a sector-wide challenge to operate within pressed margins and a tight budgetary and commissioning environment, its trade bodies have a duty to promote awareness of how improving workplace experience can deliver the productivity improvements needed to help stay competitive.

Each organisation will have its own version of the equation set out here, between investment in specific aspects of workplace experience and the resulting employee productivity gains.

The prize overall, however, is very clear: better employee engagement, retention and output, and thereby, the opportunity to boost business performance. And the aggregate of that should be a serious step towards tackling our productivity challenge as a nation.

- **Designing-in good experience:** because many businesses operate as tenants of commercial property landlords, these property owners should continually assess their tenants' needs and invest in workplace experience; understanding that productive workplaces ultimately produce good rent-payers.
- **Government taking a lead:** the lessons set out in this report for business are just as relevant to the public sector. The UK Government's productivity plan makes no references to workplace experience and the productivity opportunity we have highlighted here, which is a huge oversight, but it has at least started work to try to extract more productive value from the vast, taxpayer-funded public sector estate. This work needs to be progressed with much more urgency, its lessons put into the public domain and best practice shared.

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