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Megatrend Health

The next Kondratieff Wave

Research and Knowledge Sharing from BASF + Eurocres

Speaker:

Dr. Thomas Glatte, President CoreNet Central Europe and
Director Group Real Estate & Facilities, BASF

Sven Wingerter, & Vice President CoreNet Central Europe and
Managing Partner of Eurocres in Germany



Content



1. Megatrend Health – Curse or Blessing?
2. Why are we all effected?
3. First movers of introducing radical changes
4. What else do we need to move?





Nikolai D. Kondratieff

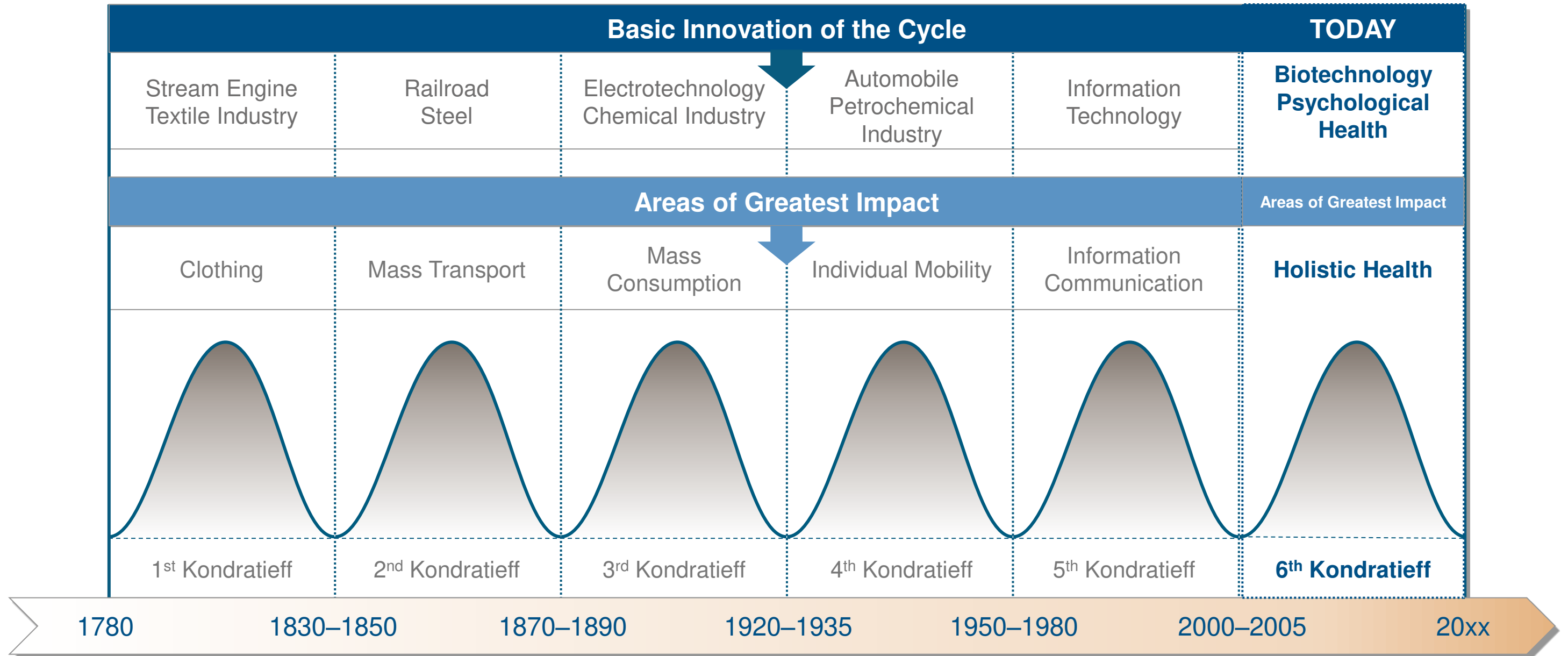
Picture: Wikipedia

- **Nikolai Dmitriyevich Kondratieff (1892-1938):**
Russian macroeconomist, founder of the long wave theory
- He proved (1925) the existence of 3 large waves during the economic development in western industrialized countries since the late 18th century
- His theory was later revised & enriched by other scientists and became established as **Kondratieff cycles** representing long economic cycles of **40-60 years**
- Economists have empirically proven **five Kondratieff cycles since the late 18th century**

6th Kondratieff Cycle:

Prediction of 1925 – Has been scientifically proven as correct!

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Source: Nefiodow, Leo and Nefiodow, Simone: The Sixth Kondratieff, 2014

**+ Challenges of the modern life poses serious problems for human health +
Despite groundbreaking medical advances in the last decades there is currently
a huge demand for new health solutions + Health as a substantial aspect for
increasing the productivity of knowledge workers +**

We are Today within 6th Kondratieff Cycle:

Holistic Health

- During the late 1990s, the global economy entered a new long wave – the sixth Kondratieff cycle
- The driving force is health care & its basic innovations are **psychosocial health** and **biotechnology**
- The newly emerging health care sector:
 - ✓ Biotechnology
 - ✓ Naturopathic treatments, natural products, all natural foods
 - ✓ Complementary/ alternative medicine
 - ✓ Environmental protection (predominantly)
 - ✓ Agriculture and diet
 - ✓ Wellness/fitness, health tourism
 - ✓ Self-medication and self-care
 - ✓ Psychology, psychiatry, psychotherapy, psychosomatic medicine
 - ✓ Workplace health management
 - ✓ Company health insurance funds, company sponsored fitness programs, cafeterias, welfare centers, health seminars, preventive medical checkups, good health bonus



Picture: <http://www.avecina.com>

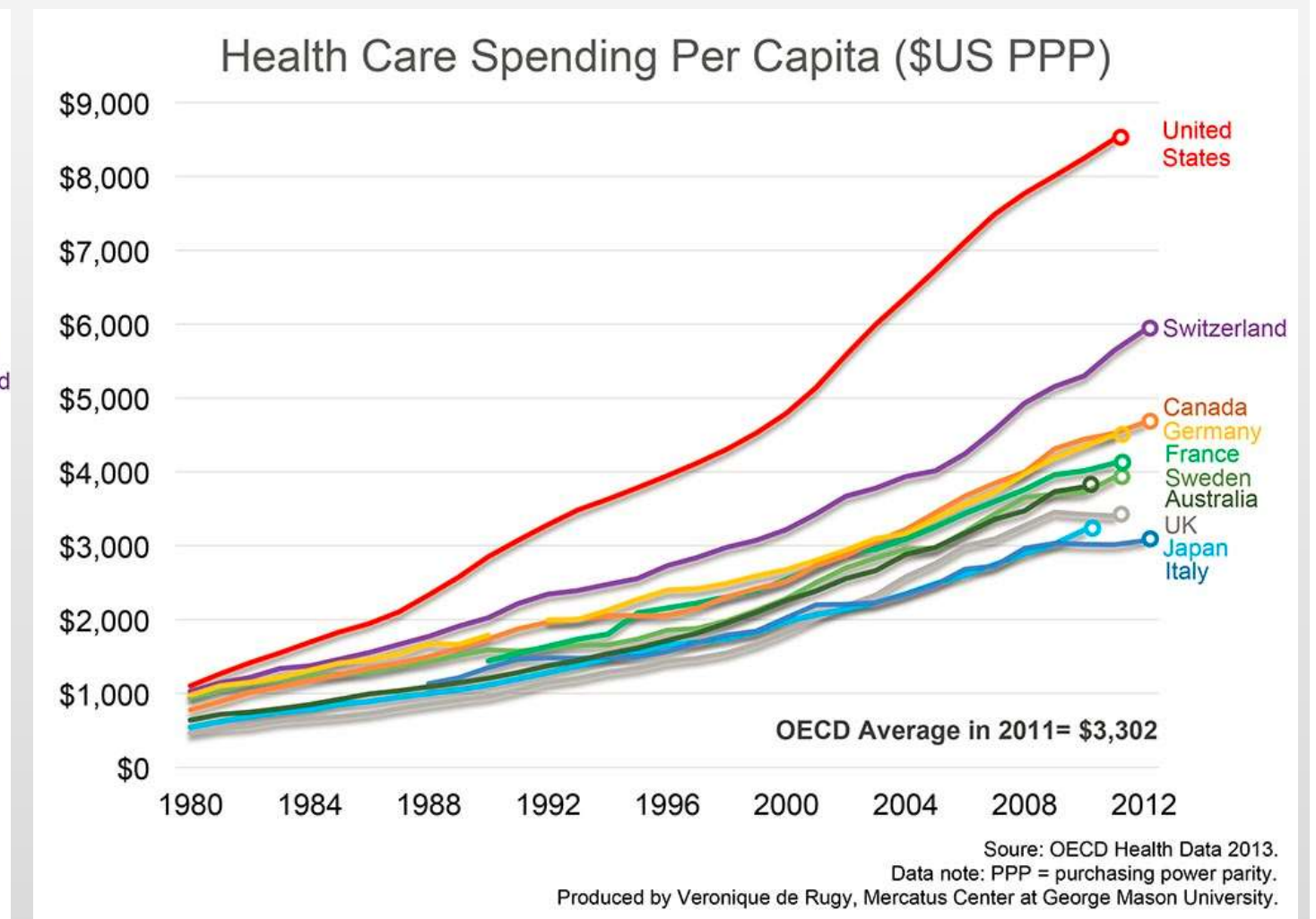
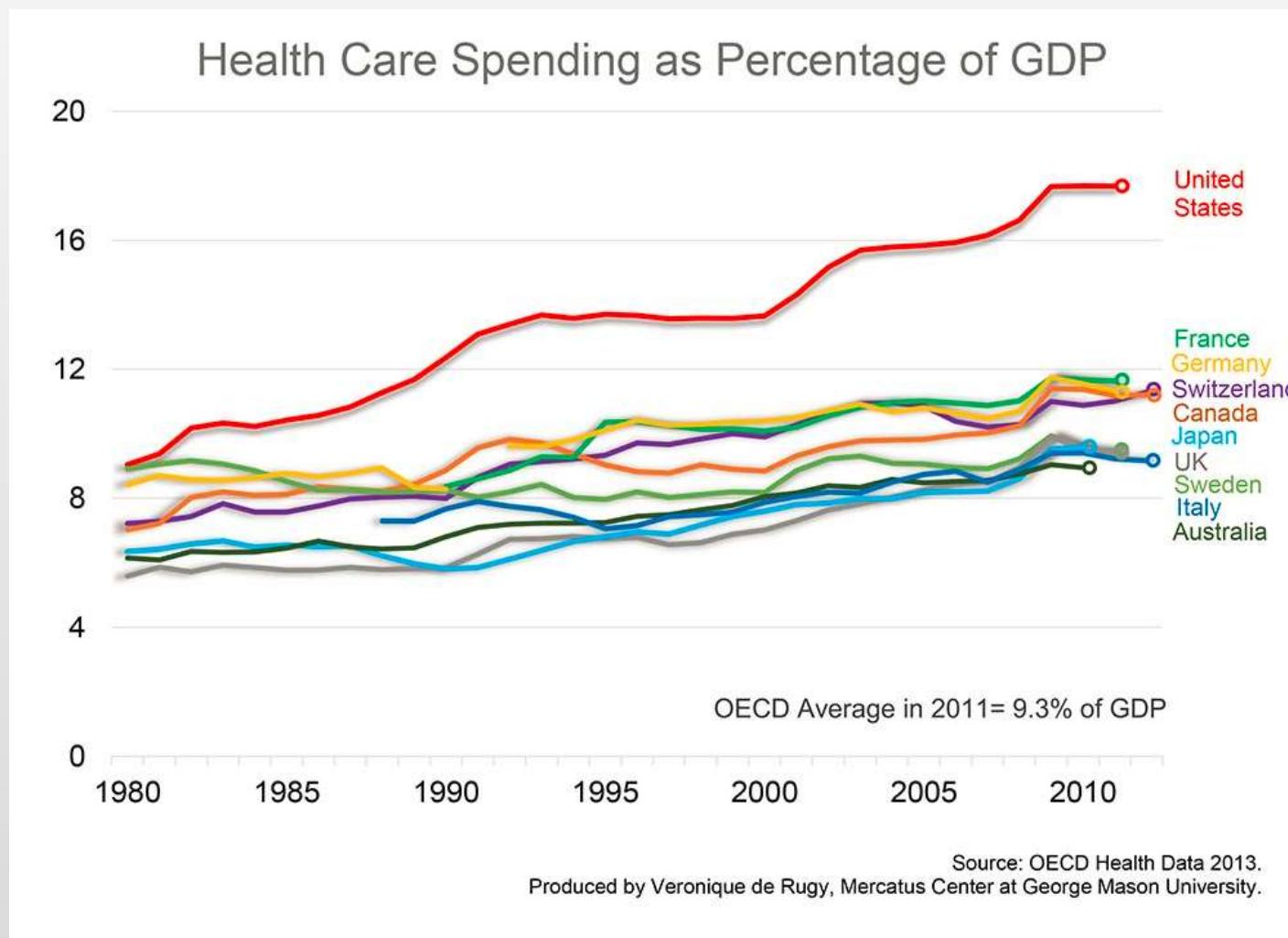
Source: <http://www.kondratieff.net>

Mega-Market Health Care

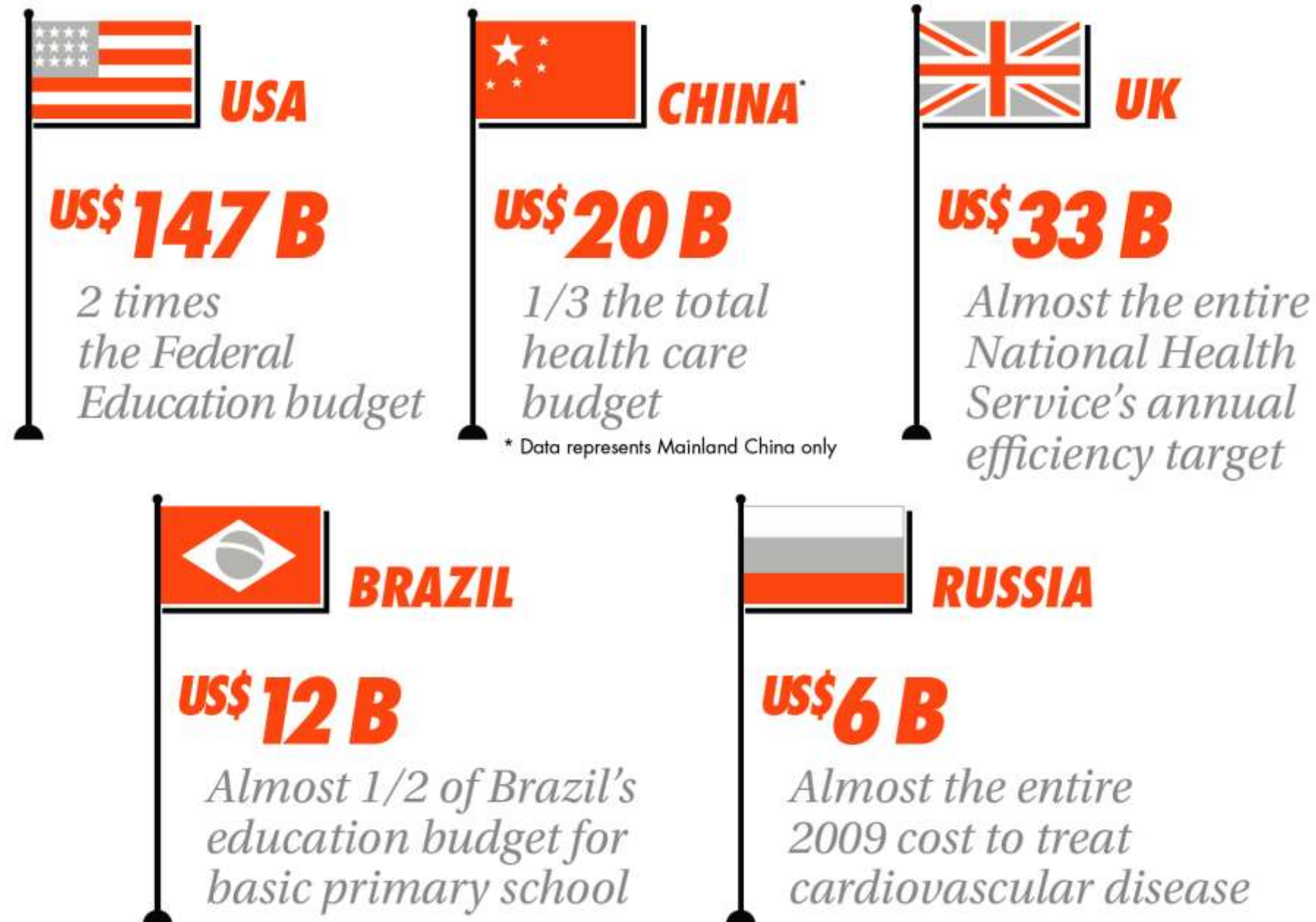
The largest Market ever - by Volume and Employees

- The health care marketplace among **largest industry sectors** in the world
 In 2012, globally 10,500 billion US-Dollars turned over with health
- Health care sector the **largest industrial employer** in USA in 2012
 (>19 million employees) & in other countries incl. Germany (approx. 5 million)
- > **50% of new jobs** in private sector between 2001-2012 in USA created in the health care field

Source: <http://www.kondratieff.net>



Direct and indirect costs of physical inactivity



Quelle: www.designedtomove.org, 2013

“In just six countries (China, India, the U.K., the U.S., Russia and Brazil), the cost of physical inactivity is estimated to have been more than US\$ 218 billion in 2008.”

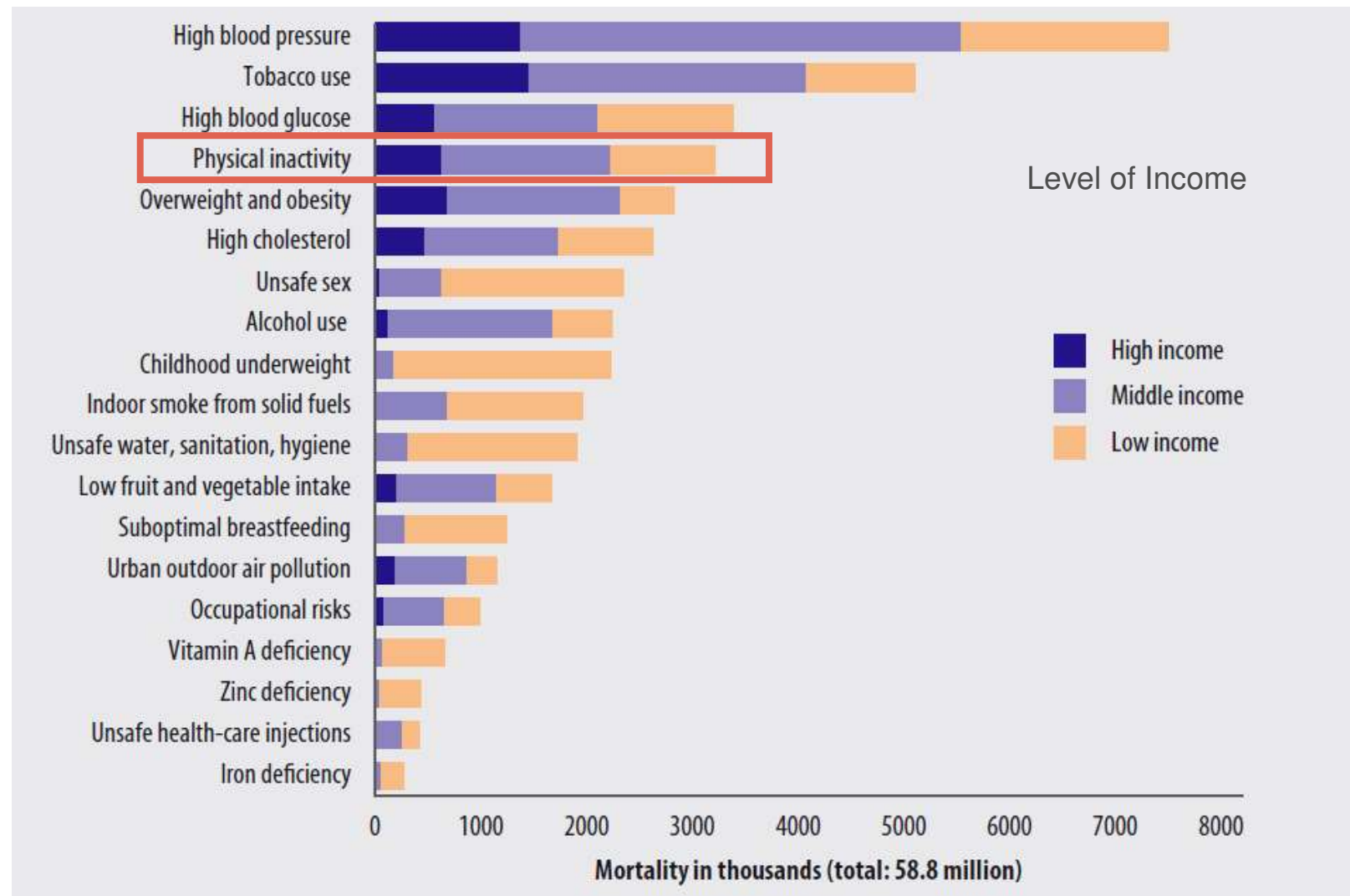


Are office jobs bad for our health?

Research survey results from
400 CoreNet Member Companies
conducted in August 2014

Permanent Sitting “is deadly”

Lack of physical activity:
one of the most common causes of death globally



Source: Global Health Risks, Mortality and burden of disease attributable to selected major risks, World Health Organization 2009

The Effects of Prolonged Sitting



Source: <http://janderson99.hubpages.com/hub/Activity-Based-Working-and-Getting-Up-Active-Healthy-at-Work>

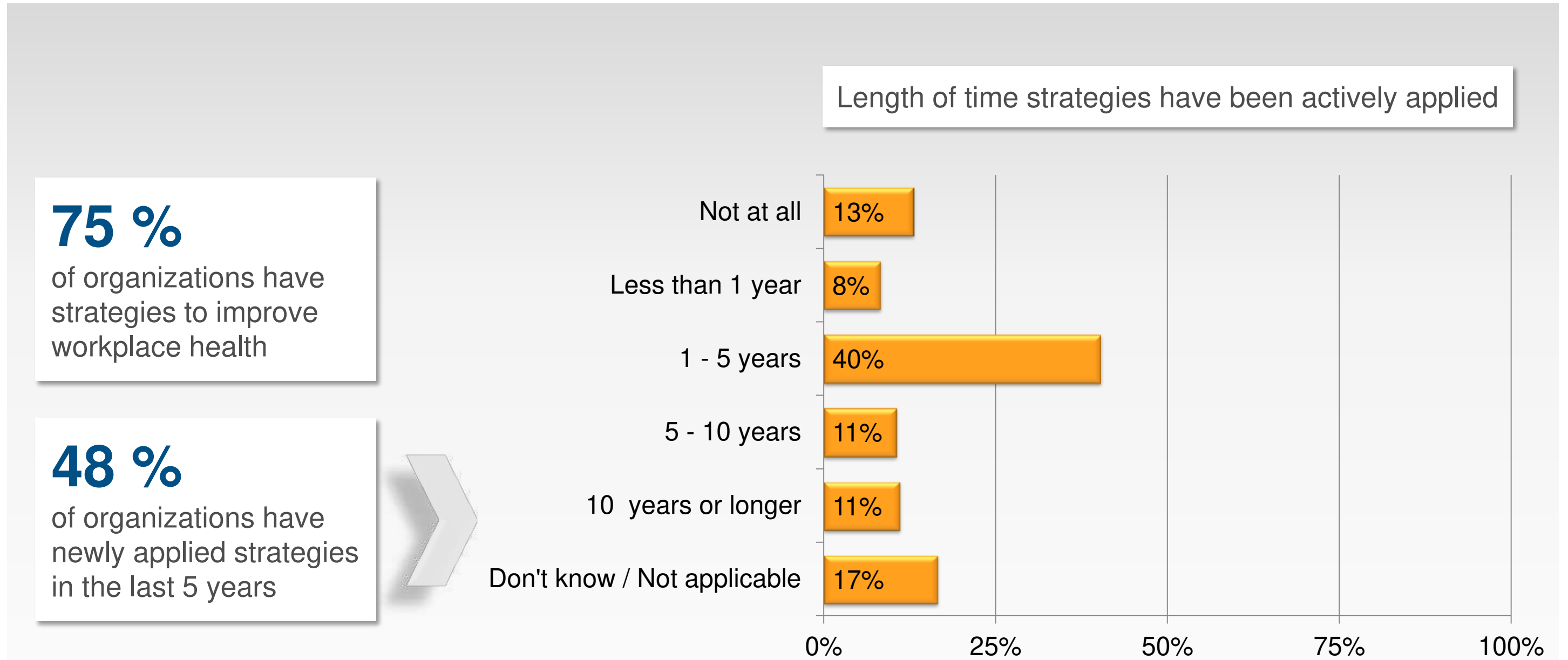
“The likelihood to die is 40% higher for people who spend more than 10 hours per day sitting, than for those who spend less than 4 hours per day sitting.”

Source: Sitting Time and All-Cause Mortality Risk in 222 497 Australian Adults, Hidde P. van der Ploeg, Tien Chey, Rosemary J. Korda, Emily Banks, Adrian Bauman, 2012

Improvement strategies already in our minds?

Survey results from the CoreNet Global Workplace Community

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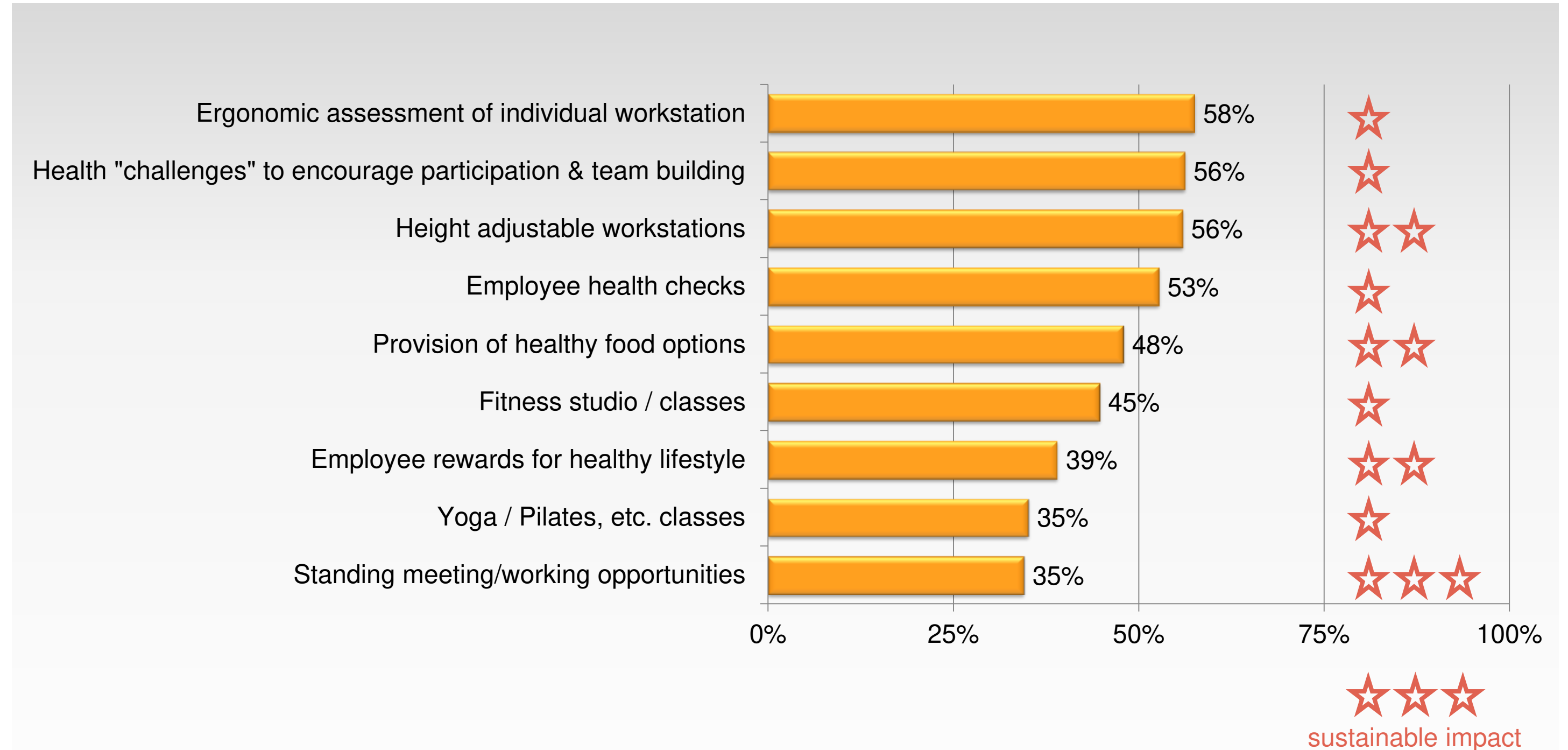


+ recent trend to apply an active approach + first experiences allow a review of responsibilities and initiatives for a holistic future strategy

Current health improvement initiatives

Survey results from the CoreNet Global Workplace Community

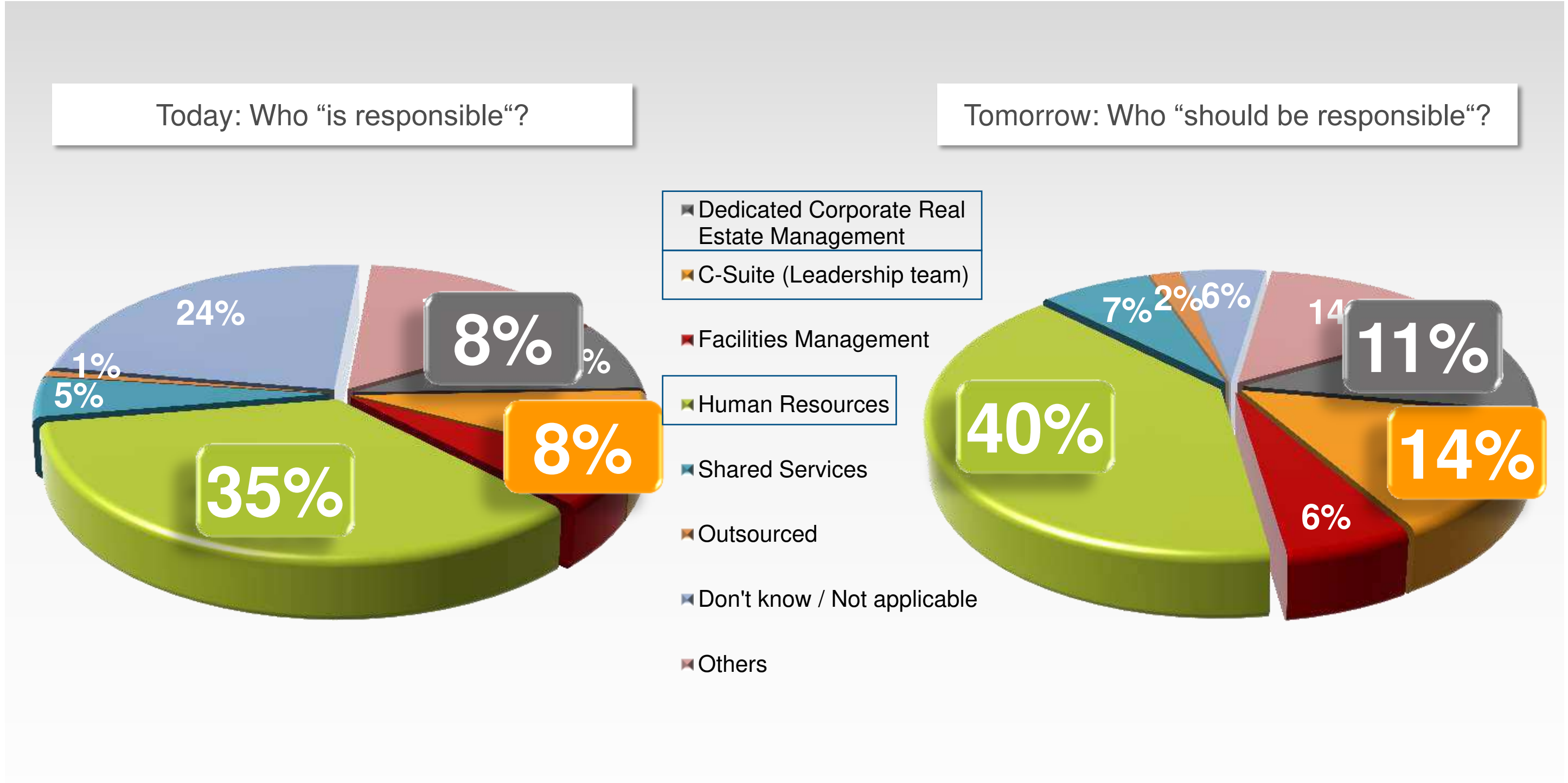
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**+ change the workplace environment to raise health improvement coverage +
sustainable initiatives change the employees' mind-set +**

Shift Responsibilities!

Survey results from the CoreNet Global Workplace Community



**+ future strategies should involve experts from Health & Safety, CREM and HR
 + essential support by a strong mandate from C-suite +**

Constant sitting is „deadly“

“Sitting Disease”
by the numbers

Our modern sedentary lifestyles,
both at home and in the workplace,
are costly for us and for our employers.

Average hours of seated commute
+ average hours of seated homelife = too much sitting!



7.7 hours

A 2008 Vanderbilt University study of 6,300 people published in the *American Journal of Epidemiology* estimated that the average American spends 55% of waking time (7.7 hours per day) in sedentary behaviors such as sitting.

Source: www.juststand.org

The 2010 American Cancer Society study published in the *American Journal of Epidemiology* followed 123,216 individuals (69,776 women and 53,440 men) from 1993–2006. The alarming results:

- Women who were inactive and sat over 6 hours a day were **94% more likely to die** during the time period studied than those who were physically active and sat less than 3 hours a day.
- Men who were inactive and sat over 6 hours daily were **48% more likely to die** than their standing counterparts.

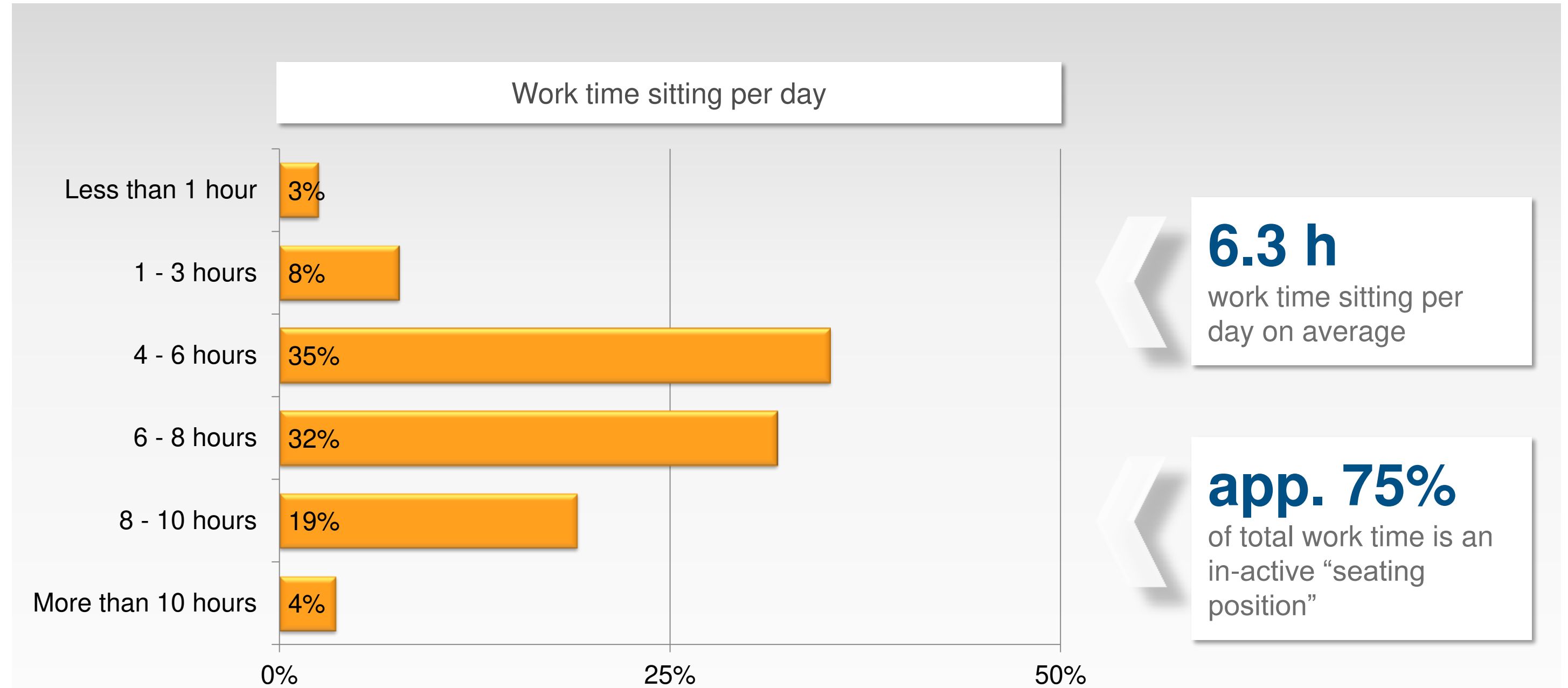
Findings were independent of physical activity levels (the negative effects of sitting were just as strong in people who exercised regularly).

„More than three hours of daily sitting can already reduce life expectancy. In comparison, those who on average sit less than three hours a day, increase their life expectancy by two years.“

Physical inactivity is a proven result!

Survey results from the CoreNet Global Workplace Community

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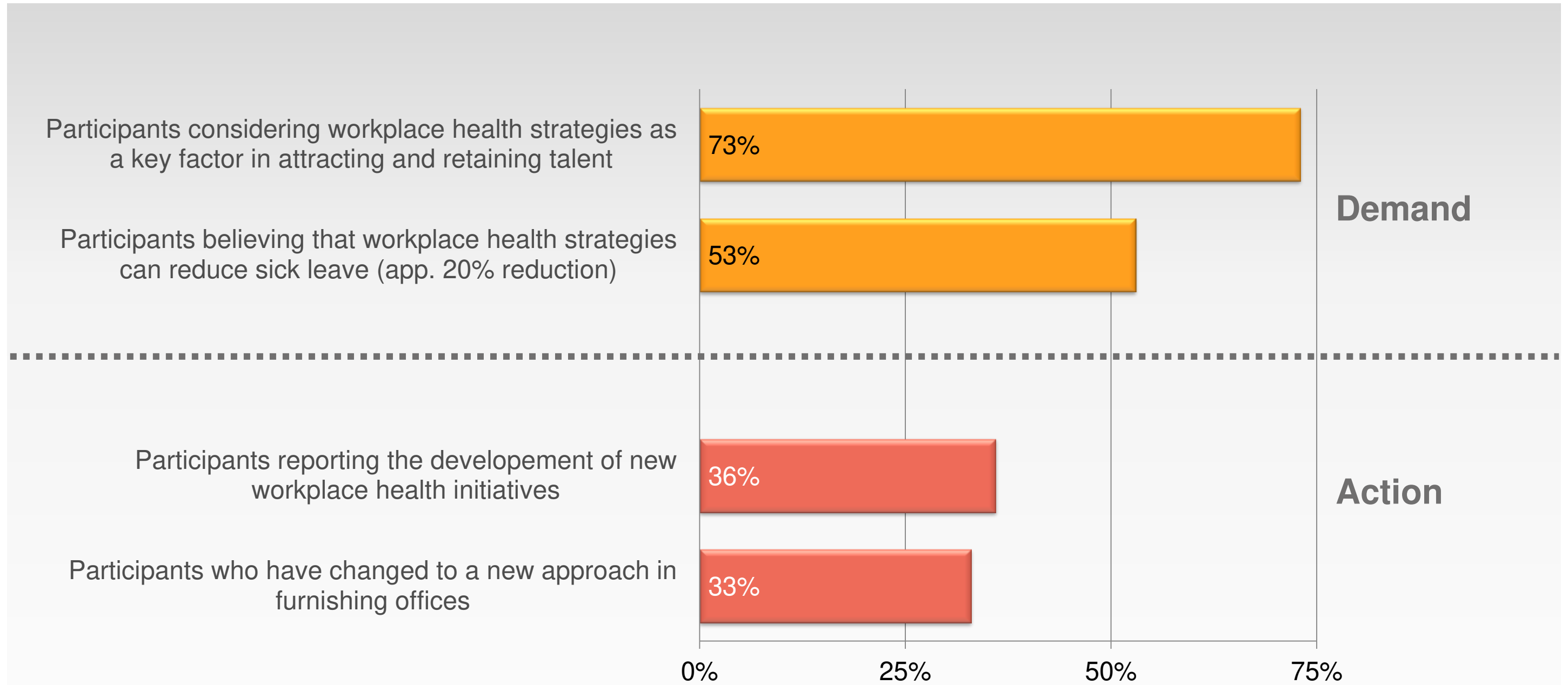
*sources: Journal of Epidemiology, 2010; Pennington Biomedical Research Centre, USA, 2012

**+ mortality is significantly increased for people with prolonged sitting hours*
+ future health strategies need to overcome sitting habits +**

“Want” vs “Reality” – Action required

Survey results from the CoreNet Global Workplace Community

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+ current actions miss the identified demand to change workplace health strategies + integration into the workplace environment is essential +

WorkPlace Health – “The Big” Promise (1/3)

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“3M is about collaboration as well as innovation – especially when it comes to your health. You can work, play and be healthy at 3M ...” www.3m.com



“Maersk is committed to providing a safe and **healthy working environment**, ..., and to continuous improvement in health and safety performance.” www.maersk.com



“**Raise awareness** among employees and management about the various elements that determine **health and well-being in the workplace** ...” www.sap.com



“... for a company’s long-term economic success. **Active, fit and motivated employees are the prerequisite for a “healthy”, a better company.**”
www.conti-online.com



“We promote the physical, mental and social well-being of our employees through a range of activities governing the ... topics of **healthy work environment**, ... “
www.siemens.com



“Effective **health** and occupational safety **management** contribute to improving quality and productivity in the workplace as well as increasing employee job satisfaction.” www.db.com

WorkPlace Health - “The Big” Promise (1/3)

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NOKIA

“We recognize the value of a healthy and happy workforce, for the good of your future, and ours.” www.nsn.com



“Bayer aims to ensure that all employees have adequate access to affordable, effective health services.” www.bayer.com



“**New ways of working** has four key components: Flexibility or agile working – Workplace of the future – **Health and well-being** – Communities” www.ey.com



“... we place a high priority on the health, well-being of all our associates. Occupational health and safety are fostered and practised by everyone, at all levels ...” www.freudenberg.com



“We **promote and support our employees’ health** to secure and reinforce our performance as a company. Integrated health management, ... help us to achieve this. www.bmwgroup.com

 **BARCLAYS**

“Provide a safe and **healthy working environment**, recognising that work/home balance is important and **aids wellbeing and productivity.**” www.barclays.com

WorkPlace Health - “The Big” Promise (1/3)

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“Our commitments include: A workplace that thrives on ... health and wellness offerings...” www.dow.com



“We take the welfare of our staff seriously, and strive to create and maintain safe and healthy working environments.” www.bp.com



“Oracle seeks to prevent work-related injuries and **promote employee wellness, health, and safety.**” www.oracle.com



“... **we provide our employees with a wide range of health and fitness actions and opportunities.**” www.hermesworld.com



“At Merck, occupational health and safety is an integral part of our EHS management system.” www.merckgroup.com



“Besides reduction of health risks at the workplace, preventive measures ... are contributing to health promotion at the workplace.” www.basf.com

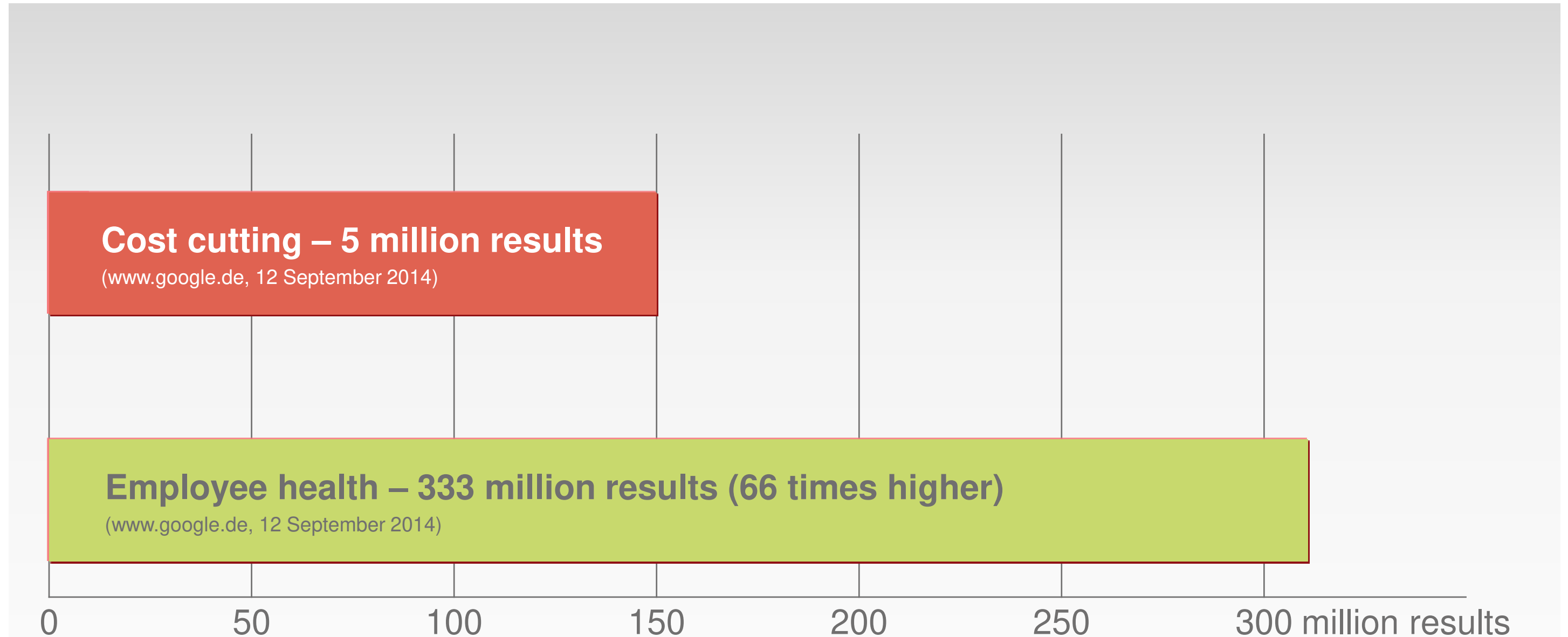


“We believe that ensuring the health and safety of all our employees is vital for our business success.” www.beiersdorf.com

Still not convinced?

Google Search: Cost cutting vs. Employee health

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Keep up with the trends – From COST to VALUE!



WHAT ELSE WE NEED TO KNOW?

Actual Facts and Figures



Conventional offices cause economic failures ...true for other countries too?

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Compared to other absences from work, back problems are of greater significance due to the **relatively long duration** of such sick leave periods – **on average 17.5 days.**

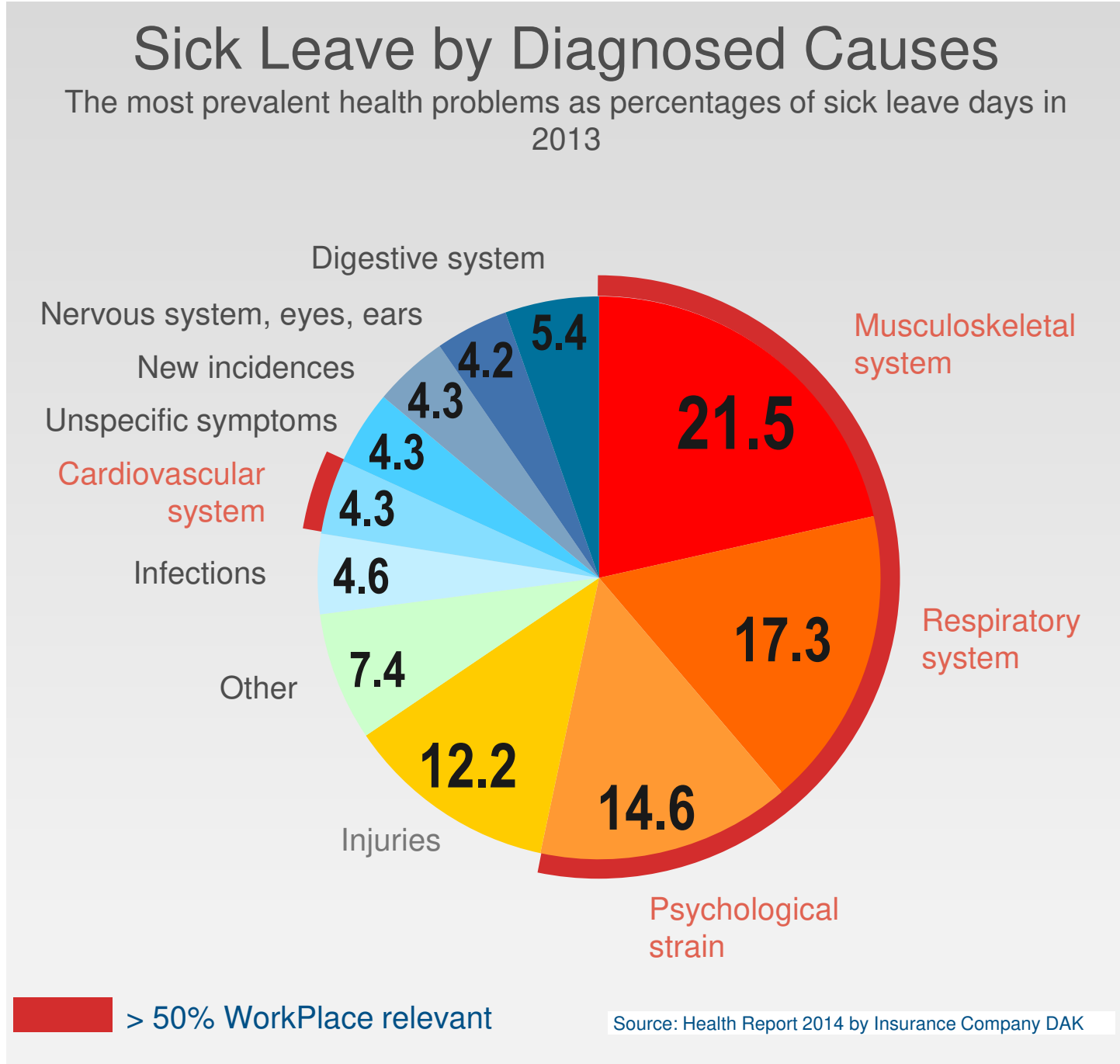
TK Gesundheitsreport 2014

+ Every 10th sick day in Germany relates to back problems.
+ This equates to 40 million days away from work extrapolated for all of Germany. +

Simple calculation of expected economic loss

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...true for other countries too?



1.000 employees
 x 3.1 sick days due to musculo-skeletal issues
 x 400 Euro/day

= 1.240.000 €

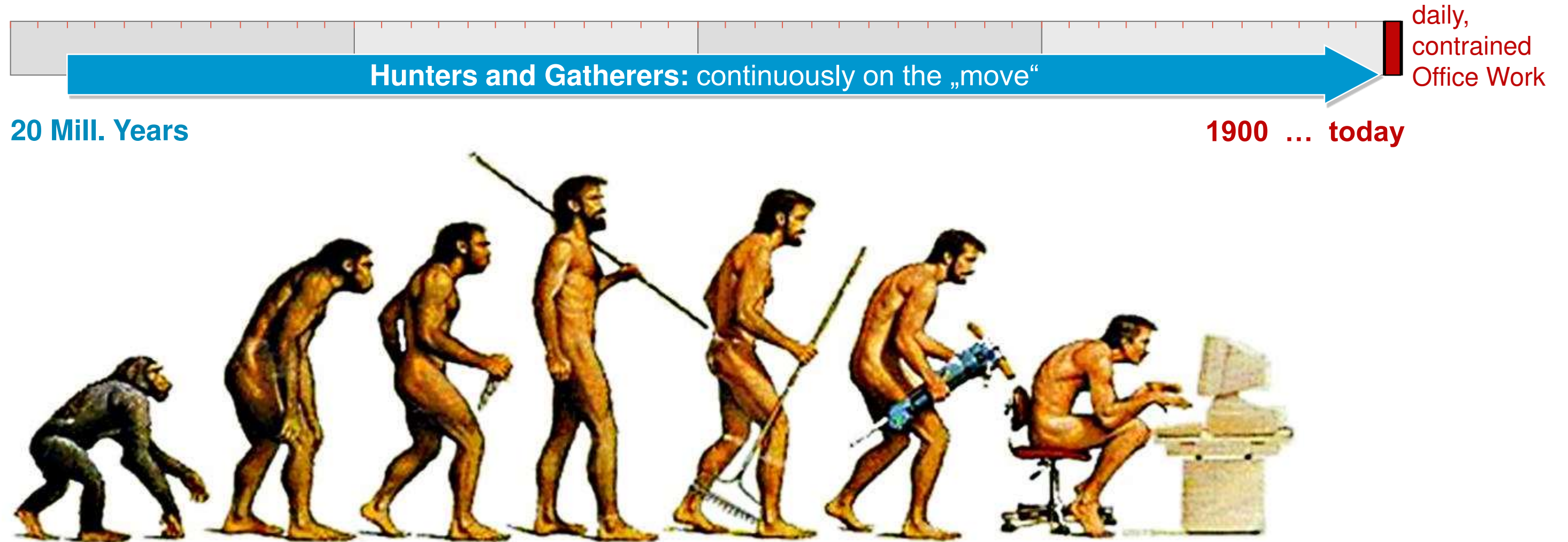
Ailments of the back caused approximately 3.1 sick days* per member at the health insurance company DAK in 2013.

(* Of 365 days in the calendar year. / Note: DAK has approximately 6.4 million members)

Change of posture!

Thoughts on the “Status Quo” of Evolution

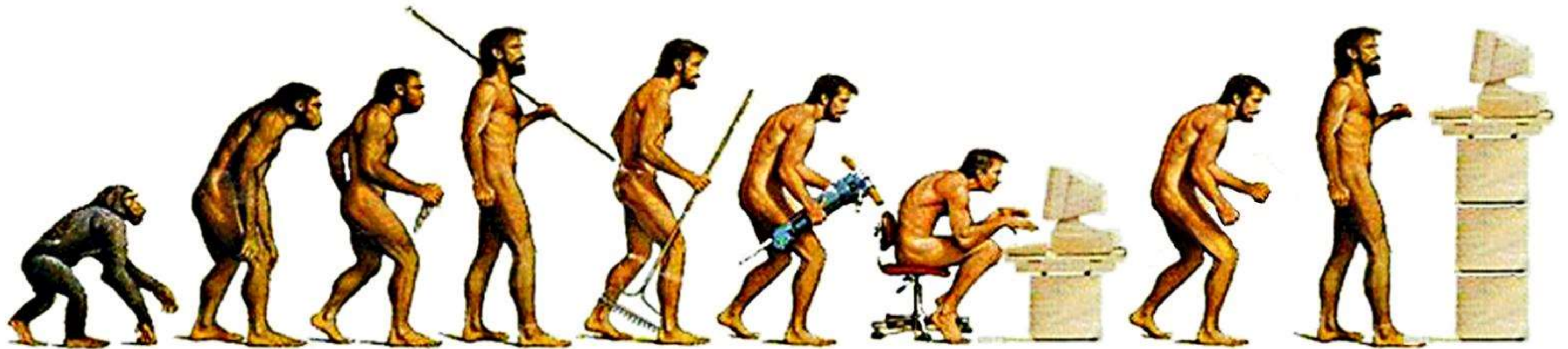
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Man was NOT born to sit – the constantly contrained seated posture in today’s offices has far-reaching negative impacts.

ActiveOffice® – the solution

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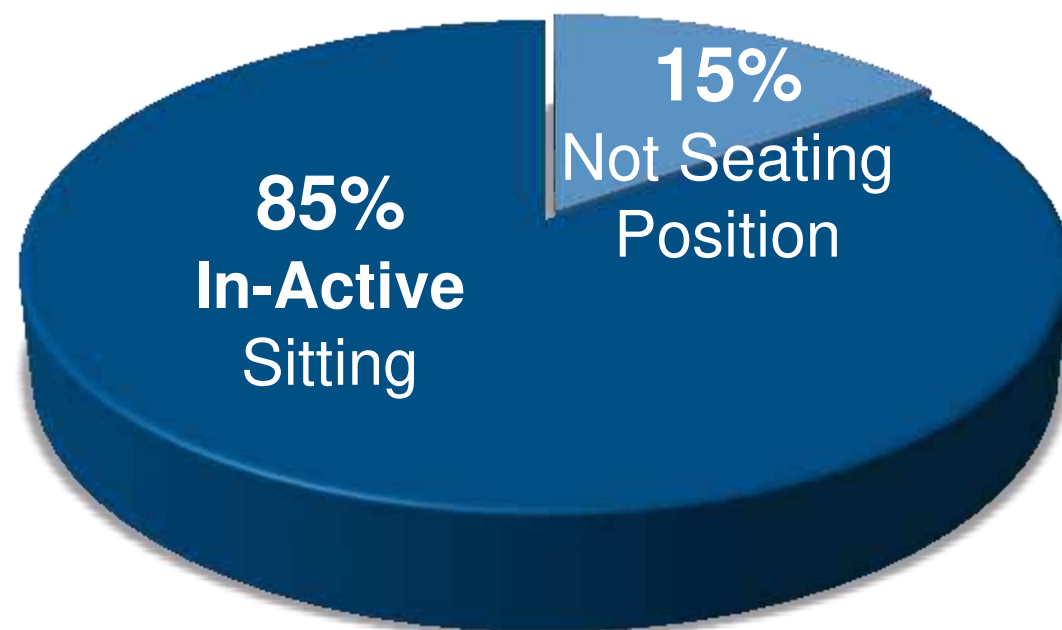


ActiveOffice®

- different postures
- versatile, regular and ongoing movement

Working Environment, Permanent Sitting

Initial Situation



Commonly people spend approx. **80** to **85%** of the **workday** **folded up** on their **chair**

Typical Day within traditional offices

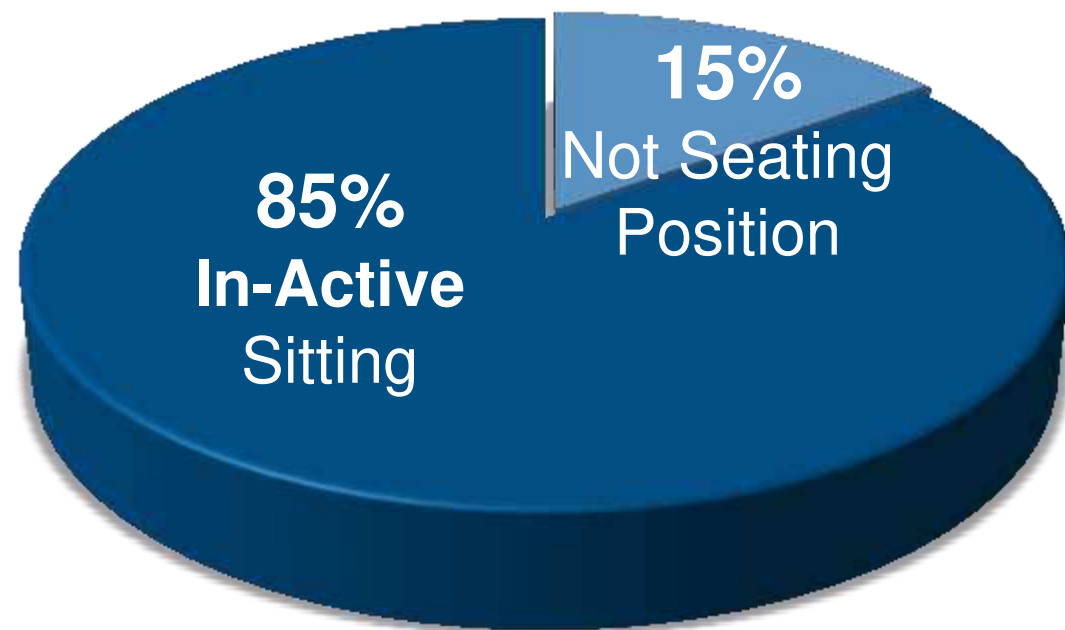


The German Federal Institute for Occupational Safety and Health (2004)

“Sitting is the new Smoking”
Today: conventional office worlds are not designed for physical activity

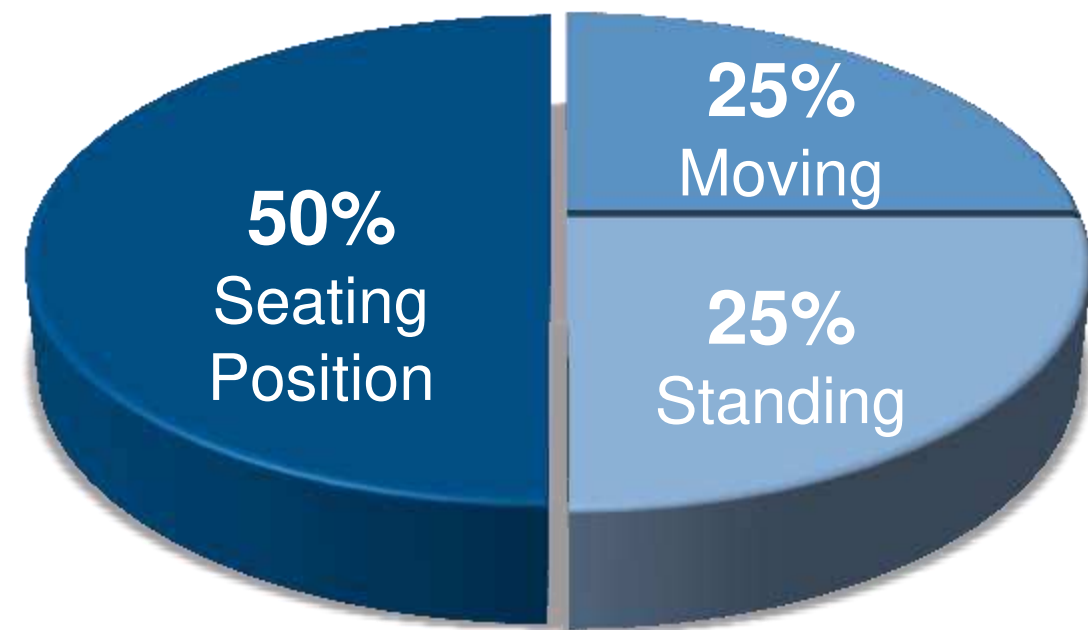
No Choice – We need physical Activities!

Initial Situation



Commonly people spend approx. **80** to **85%** of the **workday** **folded up** on their **chair**

Target Model



Reducing the **Sitting** time by **35%**

The German Federal Institute for Occupational Safety and Health (2004)

We need to drastically reduce the time of inactivity within the office!

Rethink (your day within) the Office!

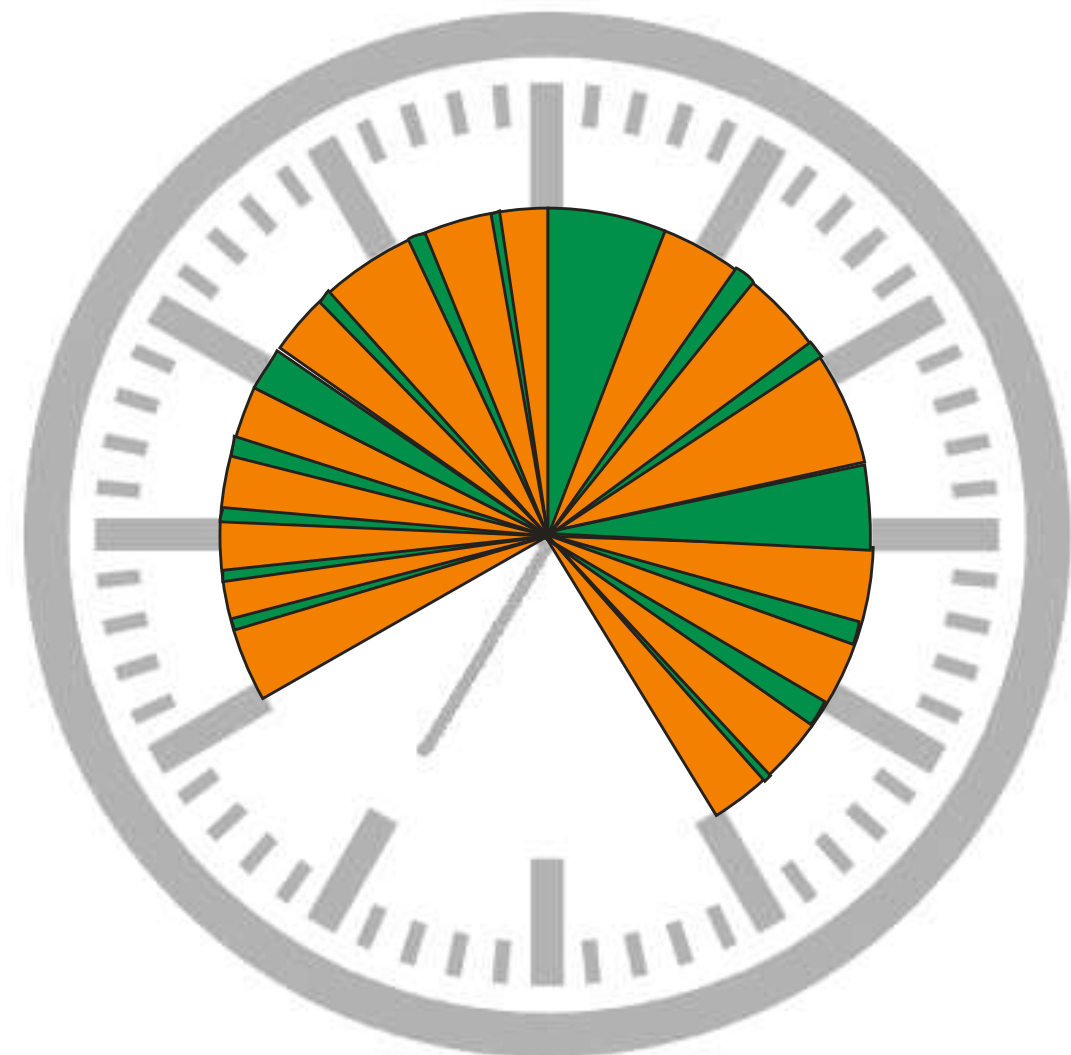
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Today: Permanent in-active (Sitting)



Current office landscapes support
lack of physical activity and **convenience**

Tomorrow: Micro-Impulses



Short micro-impulses could be
integrated in **office workflows** effectively

Objective: many short stimuli vs. longer training sessions

Is this THE answer to Rethink the Office?

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78,000 hours sitting still?
You deserve better.



Advertisement



*Soviel Sitzzeit addiert sich im Laufe eines Bürolebens. Die Folgen: Kopf- und Rückenschmerzen, Verspannungen, Müdigkeit. **ON**® macht Schluss damit! Denn die patentierte Trimension® fördert die dreidimensionale Beweglichkeit des Körpers beim Sitzen. Natürlich. Aktivierend. Sicher. Worauf warten Sie noch? Testen Sie den Stuhl, den Sie verdienen! **ON**® gibt es jetzt in Ihrer Nähe – überraschend günstig! Mehr Infos unter www.wilkhahn.de/on

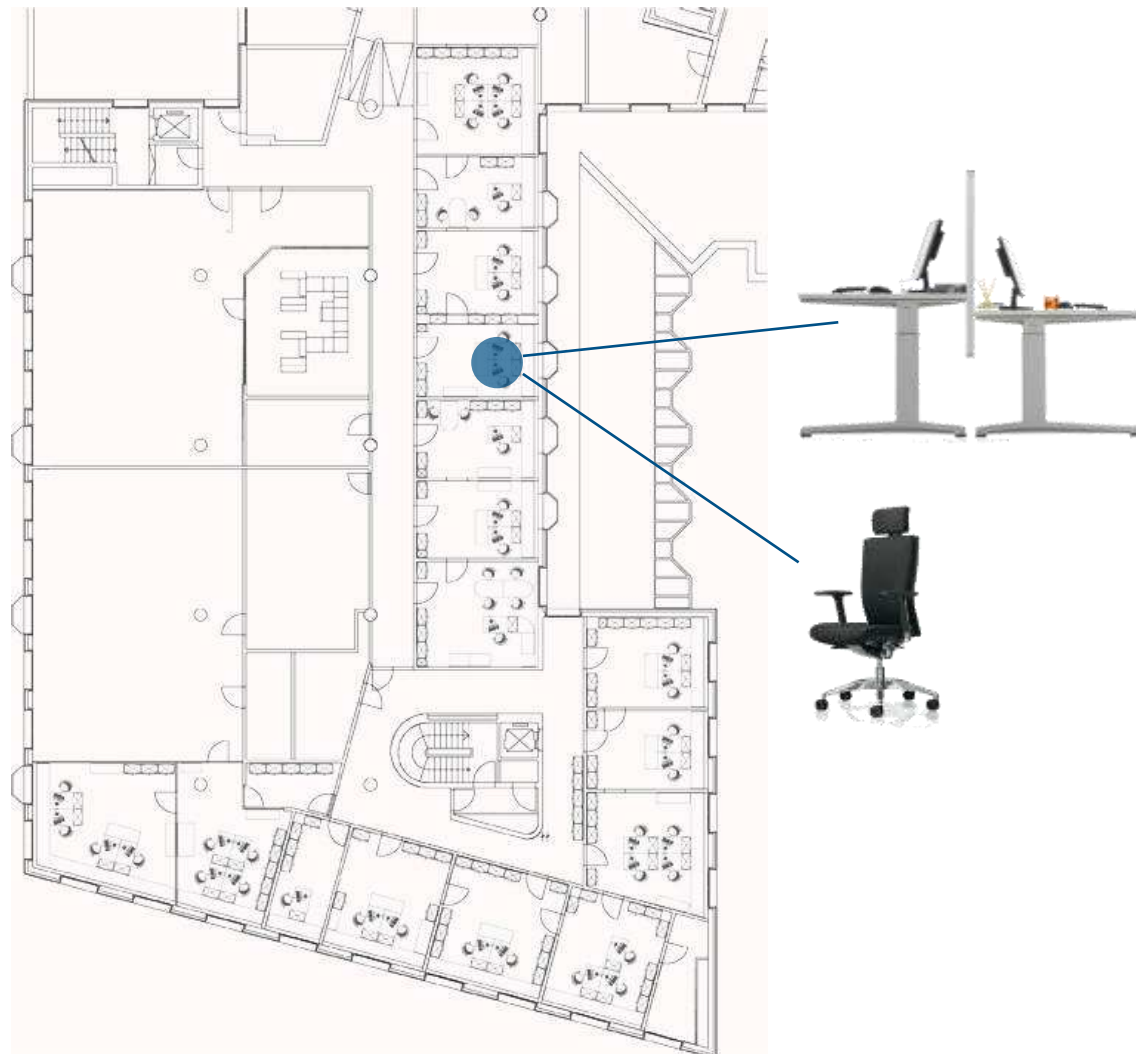


Designed TO MOVE = ActiveOffice®

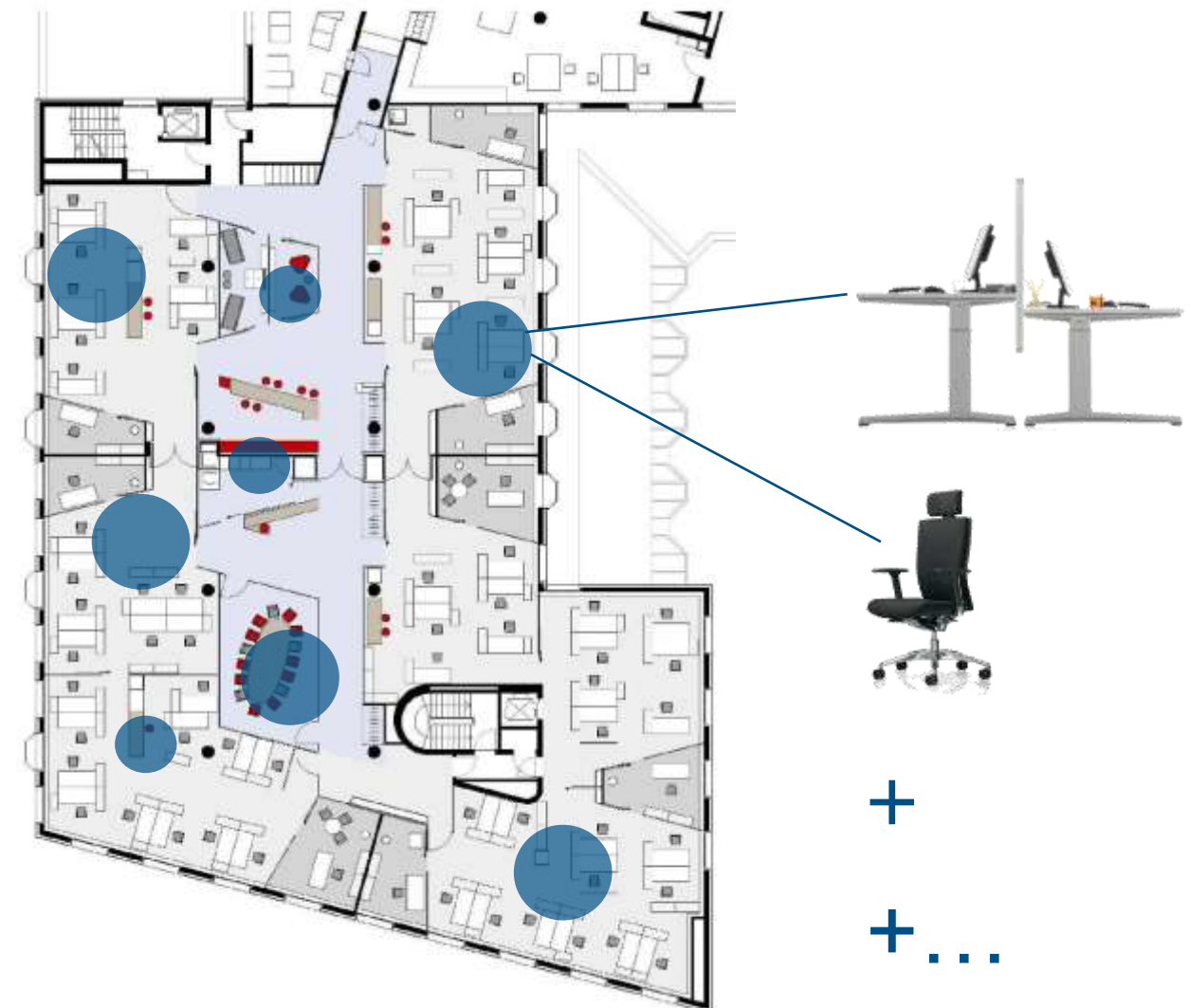
The New Generation Office Planning

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Ergonomic Workplace



ActiveOffice® Environment



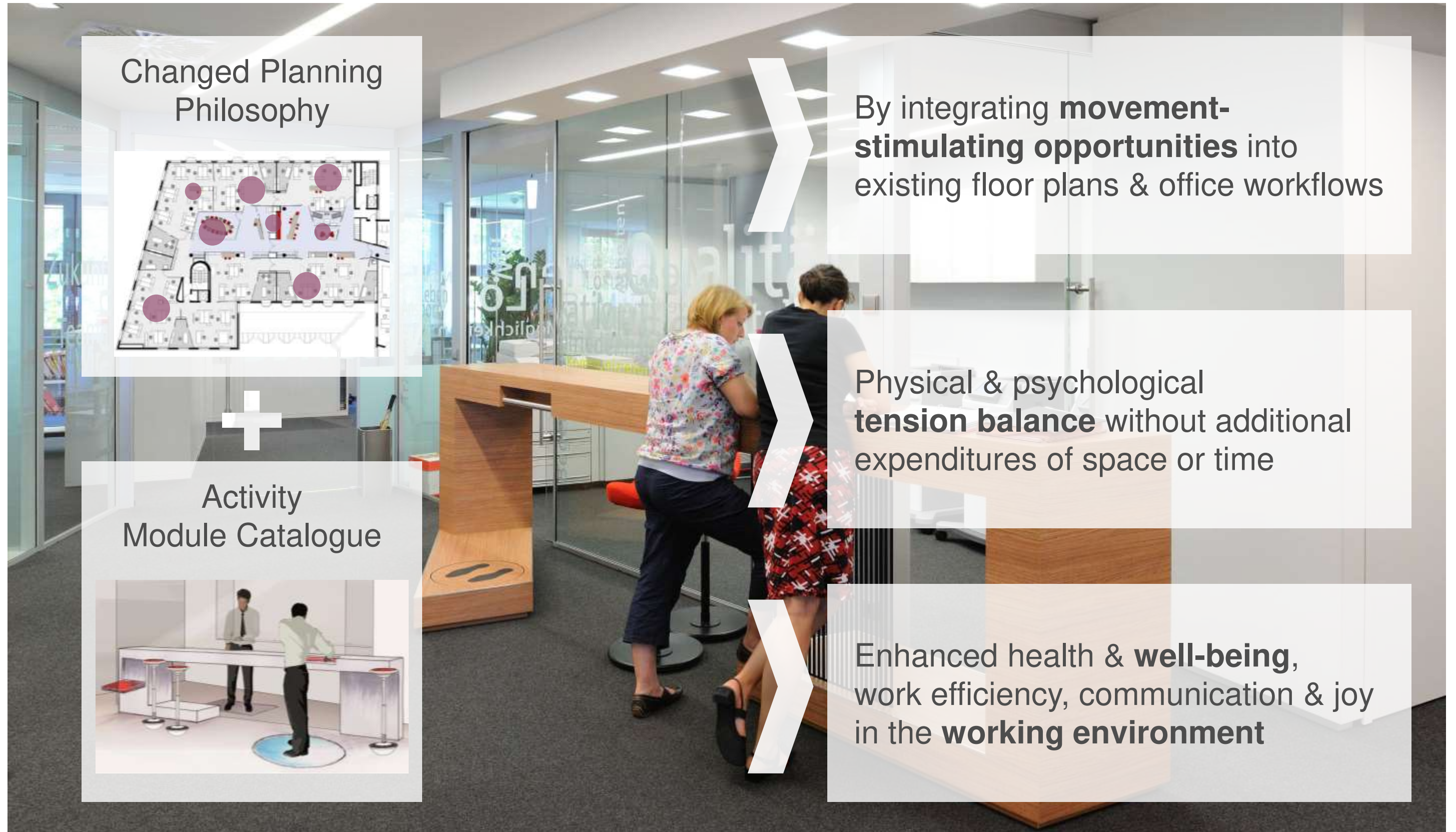
Ergonomic workplaces are limited in their motivational and health effect, are restricted to specific areas of the office & do not enhance communication

eurocresActiveOffice® utilizes the existing infrastructure & established office workflows to stimulate physical activity & enhance communication in the whole office area


Designed TO MOVE = ActiveOffice®

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Concept




Changed Planning Philosophy



+

Activity Module Catalogue



By integrating **movement-stimulating opportunities** into existing floor plans & office workflows

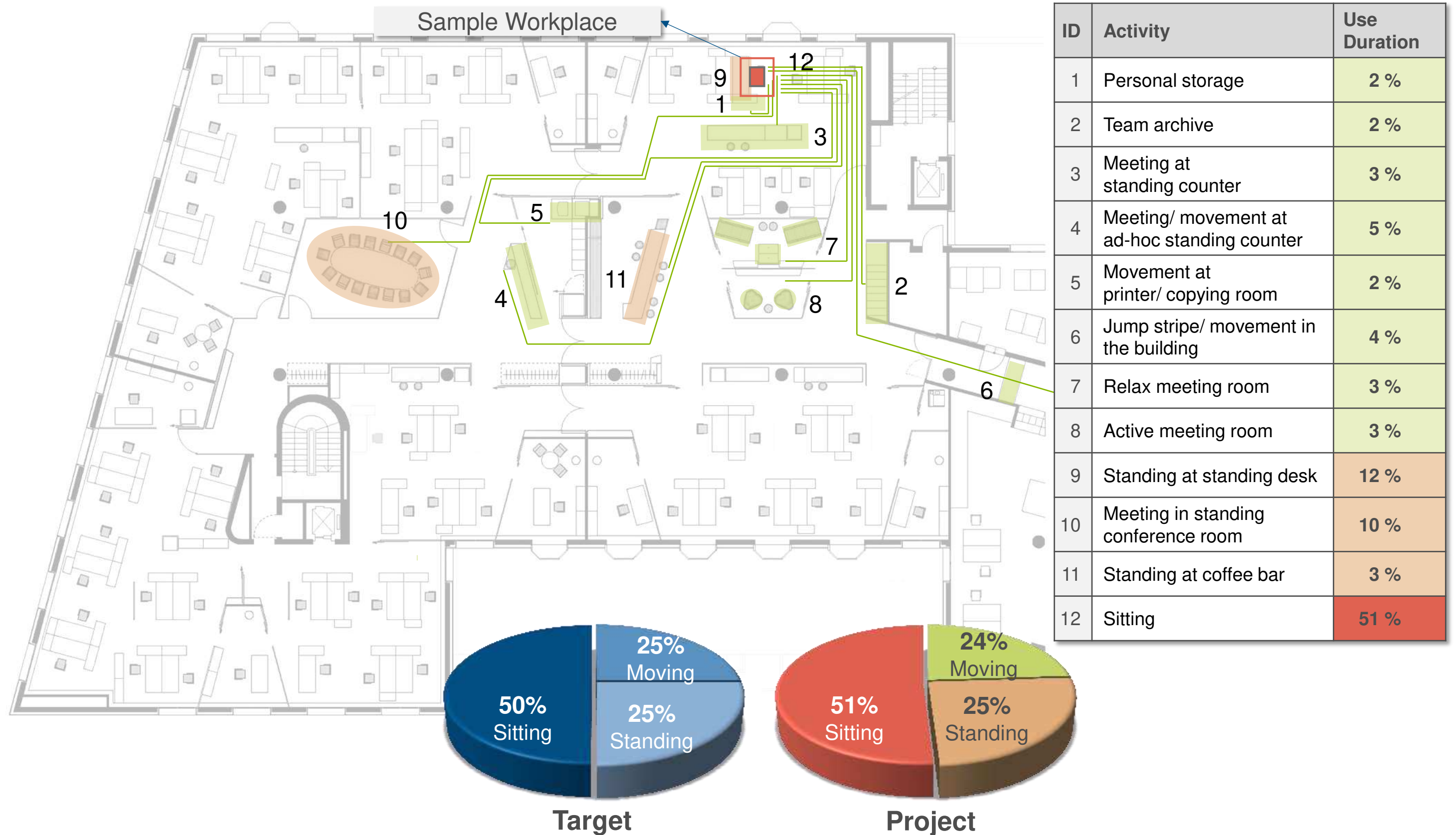
Physical & psychological **tension balance** without additional expenditures of space or time

Enhanced health & **well-being**, work efficiency, communication & joy in the **working environment**

Designed TO MOVE = ActiveOffice®

Applying planning tools to simulate activity measures

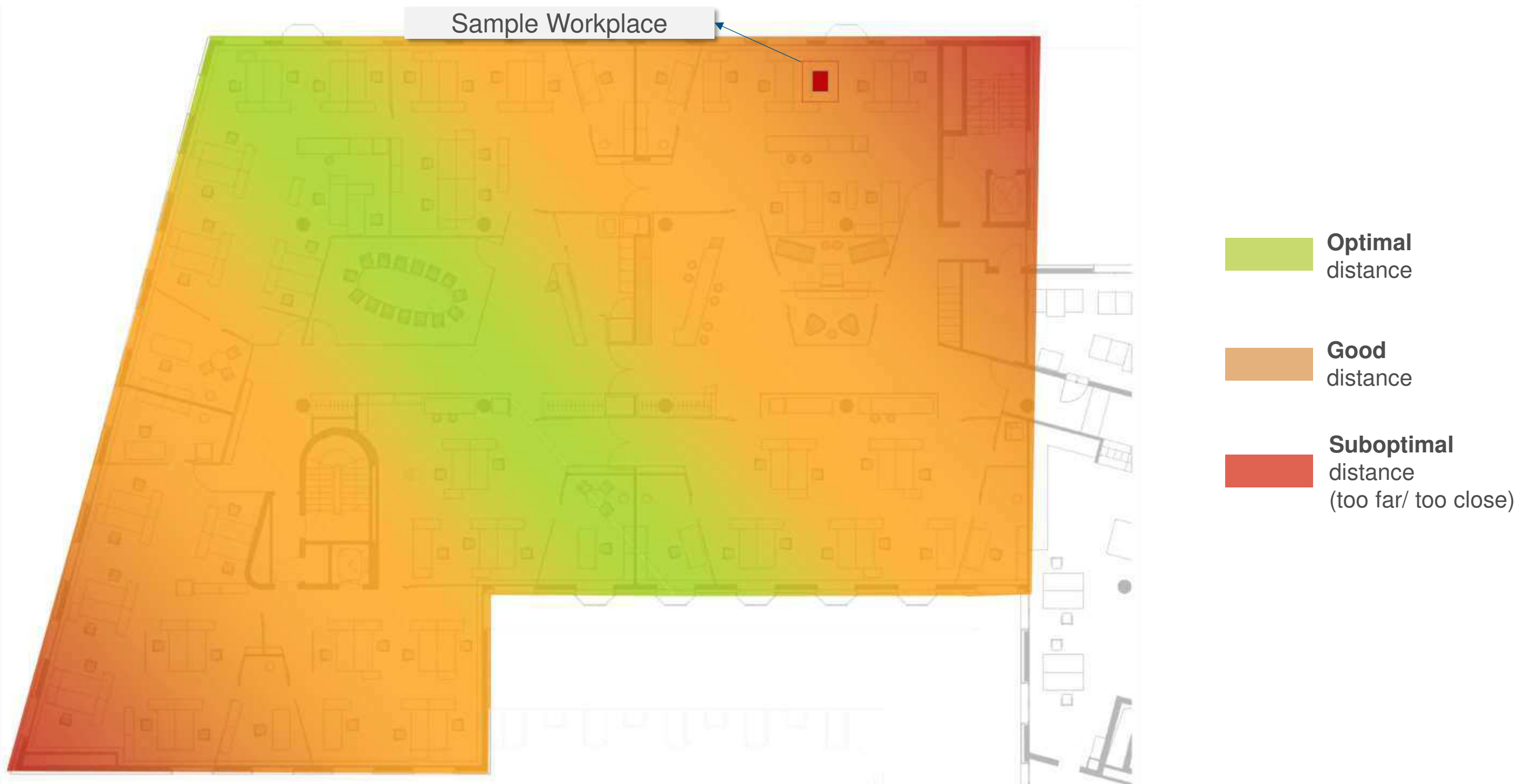
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Applying planning tools to simulate activity measures

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Movement-based & balanced positioning of all the special modules

Designed TO MOVE = ActiveOffice®

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The New Generation Office Planning

4 hours active in the office

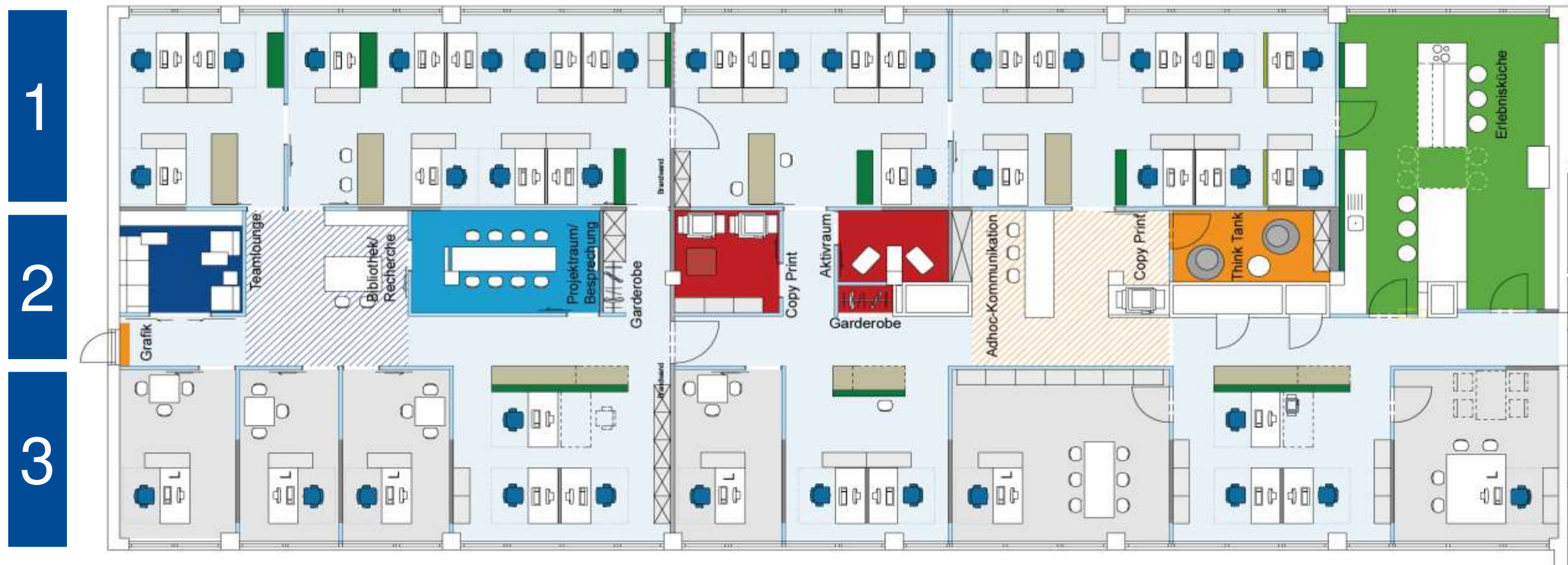


Holistic integration of movement-stimulating elements

BASF-Lampertheim - ActiveOffice®

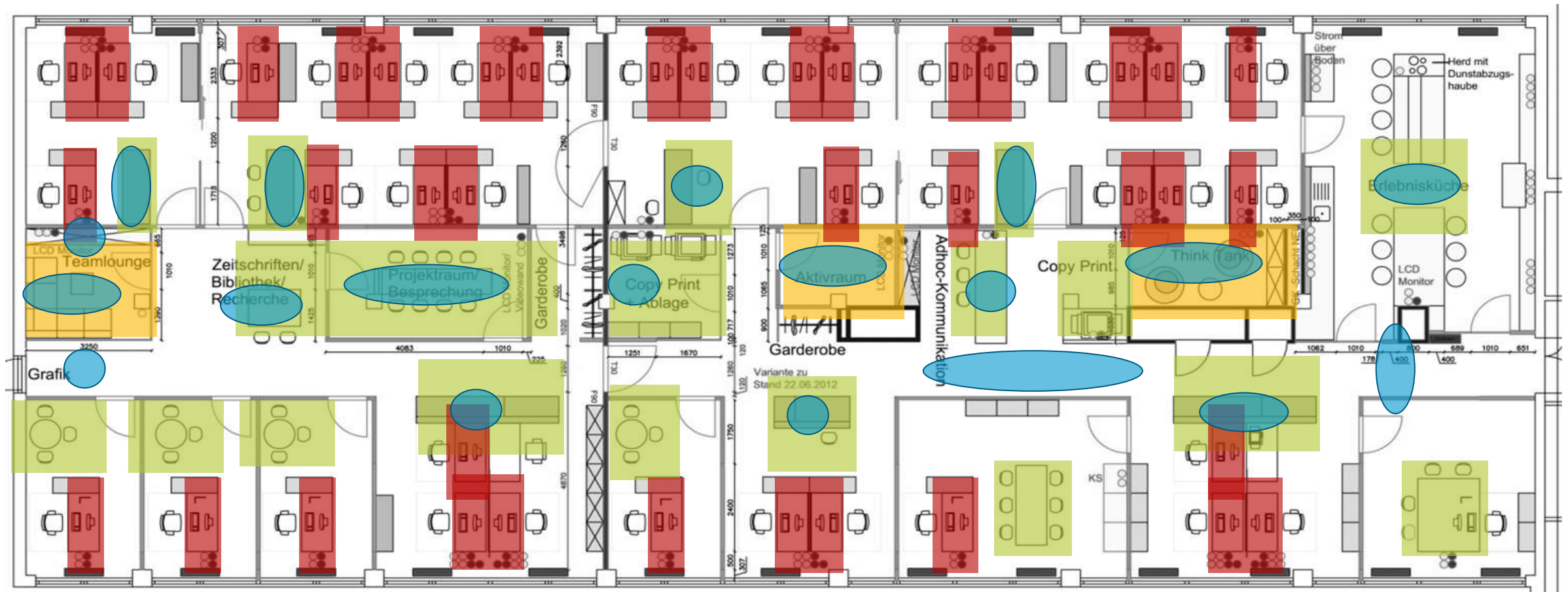
CoreNet Global Summit, Sep. 2014, Berlin




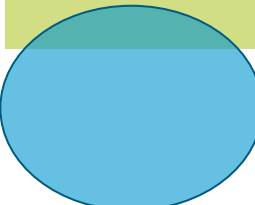
Schematic Plan Layout



1. Group Offices - Teamwork
2. Active Office - Communication & Movement
3. Cellular Offices - Focused Work

ActiveOffice[®] Modules



-  Sitting Tasks
-  Active Seating
-  Stand-up Options
-  ActiveOffice[®]-Modules

ActiveOffice Modules



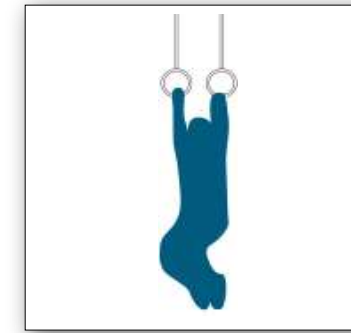
Suspending
Balls



Punchball



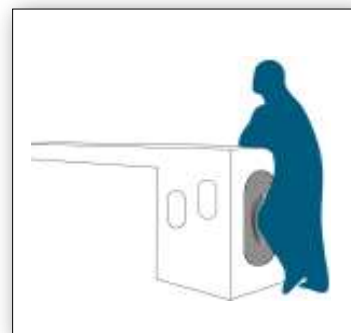
Jump Stripe



Rings



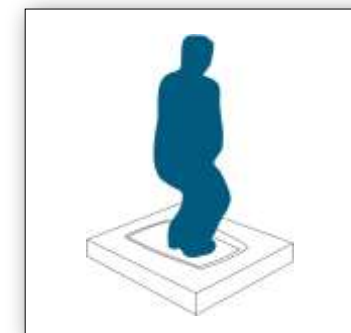
Stand-up
Desk



Expander
Knee Harp



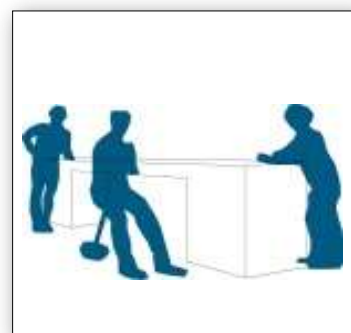
Sit-Stand
Chair



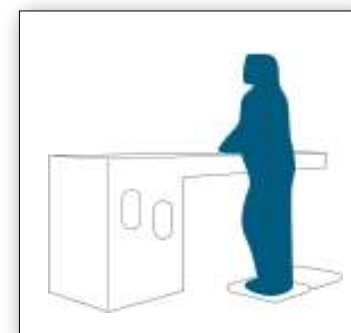
Vibration
Plate



Cross-
Trainer



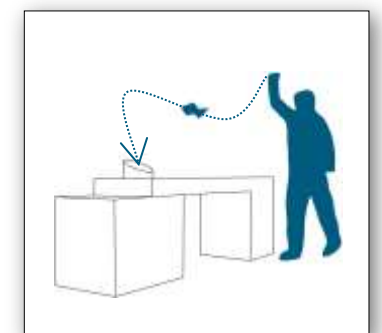
Stand-up
Counter



Stand-up
Mat



Active
Seating



Wastebasket
Throw-in

Active Stand-up Meeting



Stand-up Meeting with Punchball



Counter with Soft Floor, Rings & Ceiling balls





PROVEN RESULTS!

Support employee health – should not be slogan.

Accompanying Scientific Study – 2013

ActiveOffice® for BASF in Lampertheim

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The Chemical Company

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CORPORATE REAL ESTATE SOLUTIONS

WISSENSCHAFTLICHE BEGLEITSTUDIE eurocres ActiveOffice®

zur Untersuchung der Entwicklung des Bewegungsniveaus
von Büromitarbeitern in einer monofunktionellen
Bürowelt und einer eurocresActiveOffice Bürowelt bei der
BASF in Lampertheim

www.eurocres.com

Gathering of Measured Data

ActiveOffice® Study - BASF in Lampertheim

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MESSDATENGEWINNUNG

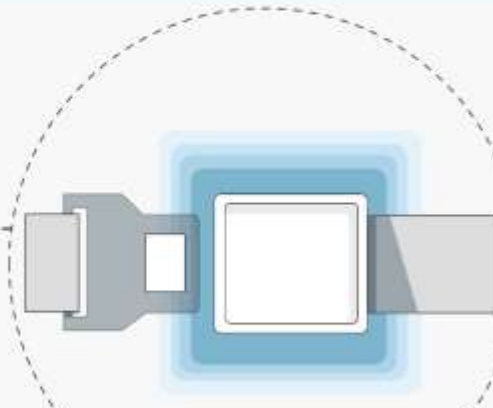
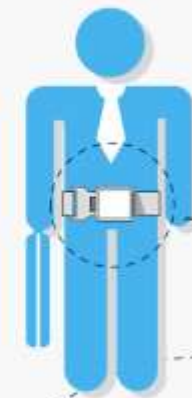


09 Messdatengewinnung

Zur Bewertung des Aktivitätsniveaus im Rahmen der Büroarbeit wurden ausgewählte Parameter herangezogen, die mittels Aufzeichnung der akzelerometrischen Daten durch die actibelt Messgeräte und anschließende Datenextraktion gewonnen wurden. Für die Parameter wurde die jeweilige Tragedauer der actibelt Messgeräte abgeglichen, um die Vergleichbarkeit zwischen den Werten der ersten und zweiten Messperiode herzustellen. Alle Daten wurden einer Plausibilitätsprüfung hinsichtlich Tragezeit und Aktivitätszeit unterzogen.

Nichtplausible Daten (z.B. in den Abendstunden eingeschaltete Geräte) wurden in der Auswertung nicht berücksichtigt, um die Ergebnisse nicht zu verfälschen. Zusätzlich erfasste demographische Informationen, wie Alter, Geschlecht, Größe und Gewicht der Probanden, können in zukünftigen, vergleichenden Studien als Auswertungsparameter hinzugezogen werden.

Während des Messprozesses war für die beteiligten Firmen kein Zugriff auf das Datenmaterial möglich. Die Messgeräte wurden nach Abschluss der einzelnen Messperioden von Trium ausgelesen und konsolidiert. Anschließend wurden die finalen Datensätze an Eurogres übergeben, um die Ergebnisse in vorliegender Studie zusammen zu fassen.



01 Messung am Probanden



02 Auslesen der Messdaten



03 Auswertung der Messdaten

Analysis Results

ActiveOffice® Study - BASF in Lampertheim

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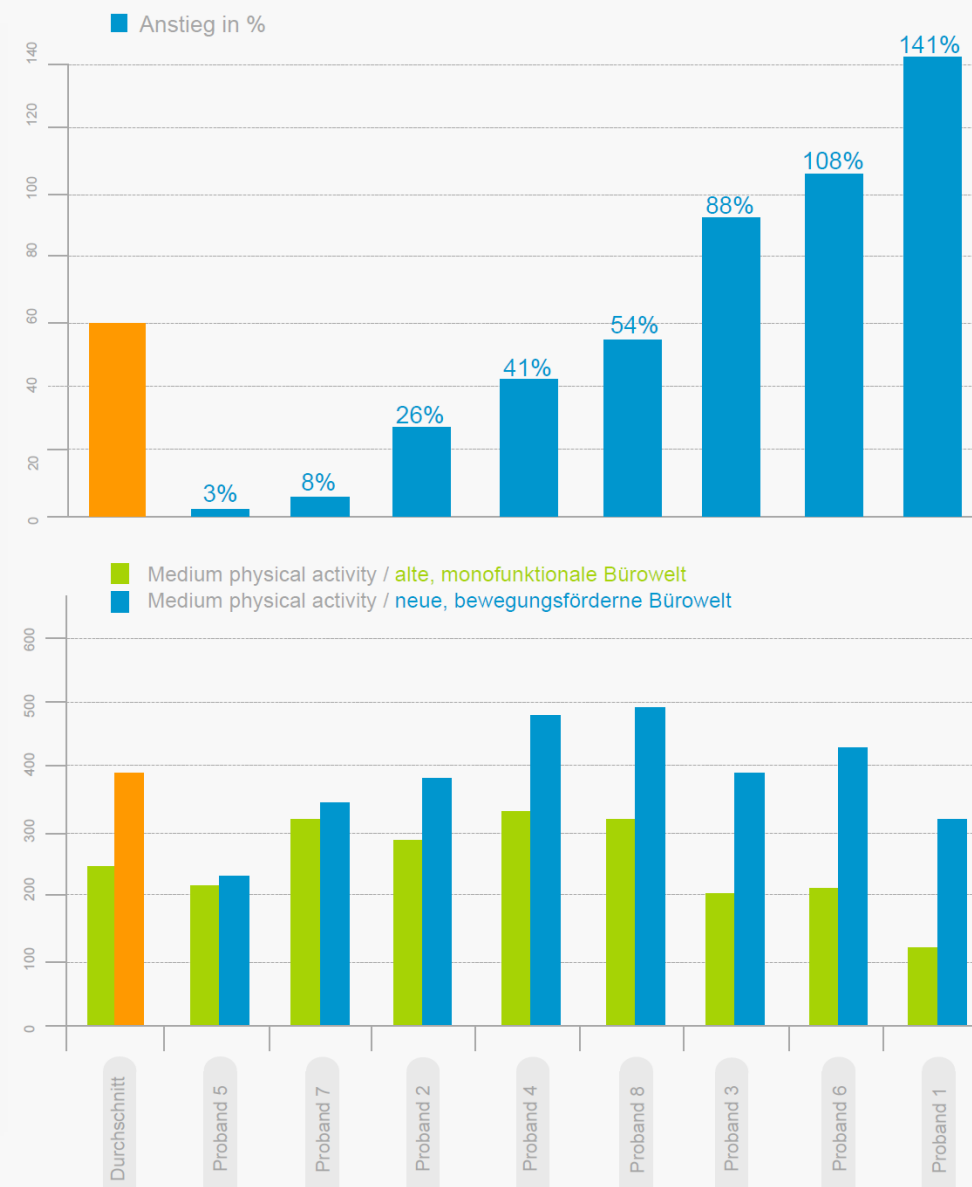
AUSWERTUNGSERGEBNISSE

BASF
The Chemical Company

eurogres
CORPORATE REAL ESTATE SOLUTIONS

Walking Steps

Increase
60%



Oktober 2013

www.eurogres.com

10

Analysis Results

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AUSWERTUNGSERGEBNISSE

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Medium Physical Activity

Increase
35%



Oktober 2013

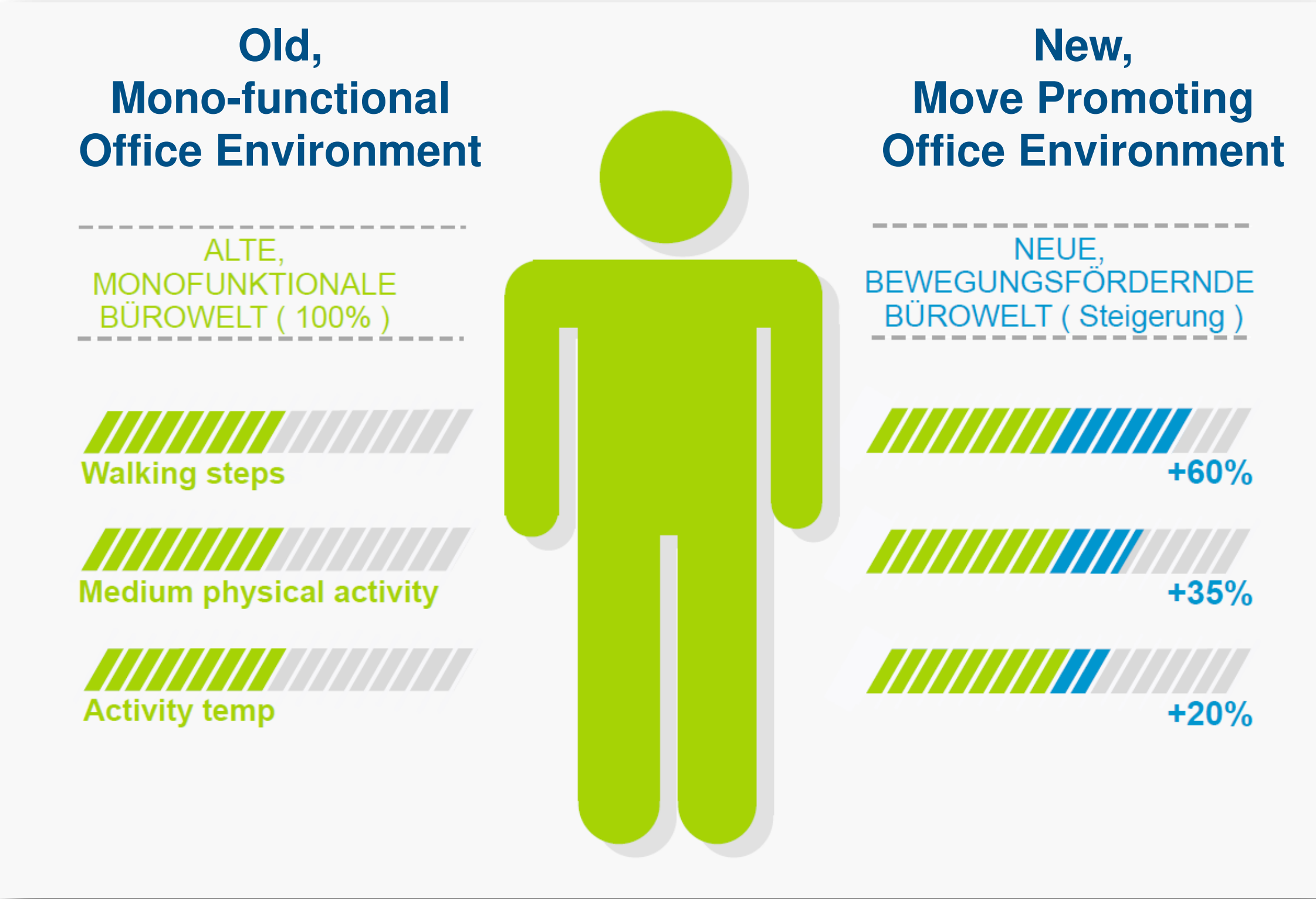
www.eurogres.com

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Overview of Analysis Results

ActiveOffice® Study - BASF in Lampertheim

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ActiveOffice® Certification

Status June 2014

EUROCRES
WORK.
PLACE.
PERFORMANCE.

ACTIVE OFFICE®

Projekt #006 -

UNION INVESTMENT
Gerlinghaus Musterfläche

Lageplan mit Übungsanleitung



Currently 3.500 ActiveOffice® Certified Workplaces in Germany

eurocres ActiveOffice®

The First Rollout Project

EUROGRES
WORK.
PLACE.
PERFORMANCE.



➤ **According to post-occupancy surveys,
89% of employees have experienced a more active (office) life** ◀

„Sitting is the new smoking“

Conventional office worlds are not designed for physical activity and cause medical conditions



► eurocresActiveOffice®

Integrating „offers“ encouraging movement into existing office environments and processes.



„Constant sitting is deadly“

Status Quo:
People spend 80% - 85% of their time in the office seated



► eurocresActiveOffice®

Physical and mental tension relief is achieved without the need for additional space or time



► Proven results

- ✓ 35% Increase of movement levels
- ✓ 60% Increase of walking steps
- ✓ 20% Increase of activity levels



We want your feedback, please.



Sven Wingerter
Geschäftsführer/
Managing Partner

Eurocres Consulting GmbH
Europa-Center 17th floor
Tauentzienstr. 9-11
10789 Berlin, Germany

Telefon: +49-30-88 66 90 50
Telefax: +49-30-88 66 90 515
Mobile: +49-175-433 79 43

Email: s.wingerter@eurocres.com
Web: www.eurocres.com



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15-17 September 2014

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