



Redefining Hybrid Work Ecosystems

Workshop Summary

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About the Urban Land Institute

The Urban Land Institute is a global, member-driven organisation comprising more than 45,000 real estate and urban development professionals dedicated to advancing the Institute's mission of shaping the future of the built environment for transformative impact in communities worldwide. ULI's interdisciplinary membership represents all aspects of the industry, including developers, property owners, investors, architects, urban planners, public officials, real estate brokers, appraisers, attorneys, engineers, financiers, and academics. Established in 1936, the Institute has a presence in the Americas, Europe, and Asia Pacific regions, with members in 84 countries.

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Overview

Since the COVID-19 pandemic, the 'work from anywhere' mindset has emerged. Although remote work has been normalised, daily challenges—such as space constraints at home, connectivity and utility costs, wellbeing concerns, and productivity trade-offs—have revealed the limitations of purely remote models. As a result, employers, landlords, and advisors are rethinking the purpose of office spaces and their overall portfolio strategies.

On 5 February 2026, ULI Hong Kong, in collaboration with The Executive Centre, hosted a workshop focused on developing practical hybrid workplace strategies for occupiers and landlords. Approximately 30 real estate leaders—representing landlords, asset managers, occupiers, designers, workplace specialists and consultants—met to share experiences, debate models, and co-create implementable approaches.

The ideas captured here reflect the collective insights from the workshop and are intended as a catalyst for stronger hybrid strategies across the Asia-Pacific region.

Three outcome areas emerged as the organising framework for the day's discussions: **enhancing employee experience, optimising space utilisation, and protecting real estate value**. Across all three, participants converged on a common starting point: hybrid should not be treated as a binary choice between home and office, but as an intentionally designed ecosystem of people, places, policies and technology.



Enhancing the Employee Experience

The quality of the employee experience is the foundation on which any hybrid strategy stands or falls — and participants were clear that it is shaped less by physical design alone than by the degree of empowerment, belonging and cultural coherence that organisations are able to sustain across distributed settings.

EMPOWERMENT AND CHOICE ARE CENTRAL TO ADOPTION

Empowerment—both managerial and individual—emerged as a core principle. Employees perform best when given clarity about expectations and the autonomy to choose the right place for the task at hand: focused deep work, team collaboration, or client meetings. Hybrid frameworks that combine clear organisational rules with personal choice reduce friction, preserve culture and support retention.

DESIGN FOR BELONGING: NEIGHBOURHOODS, ANCHORS AND PLACE-MAKING

Participants discussed the neighbourhood concept—clusters of teams anchored in familiar zones—as a practical way to retain team cohesion while enabling flexibility. Anchors, whether designated seats or small consistent teams, help people find colleagues and maintain a sense of belonging. However, neighbourhoods can unintentionally create silos. Design must balance team adjacency with deliberate cross-team interaction (shared collaboration spaces, rotating programmes, curated events).

HOT DESKING REQUIRES CAREFUL CHANGE MANAGEMENT AND PERSONALISATION

Hot desking has produced mixed feedback. When implemented without attention to personalisation, it provokes negative sentiment and undermines culture. Successful deployments combine strong booking tools, locker or personal storage, clear etiquette, and designated team anchors. Technology that enables simple booking, visibility of colleagues, and community features—such as knowing who is in today and where they sit—increases adoption and reduces friction. Apps for desk booking, occupancy analytics, room scheduling and social coordination are valuable, but must be intuitive and integrated with HR and facilities workflows.

Optimising Space Utilisation

Getting space utilisation right in a hybrid environment requires organisations to move beyond headcount-based planning and toward a data-led understanding of how, when and why different types of spaces are actually being used — and to redesign their portfolio mix accordingly.

HYBRID IS NOT BINARY—IT IS AN ECOSYSTEM

“Hybrid” should not be framed as a choice between home and office. Instead, it is best understood as an ecosystem of people, places, policies and technology that must be intentionally designed and governed. Successful hybrid strategies integrate a spectrum of workplace settings—head office, satellite hubs, neighbourhoods, hot-desking zones and third-party flexible space—supported by clear policies, manager training, booking technology, and metrics to measure outcomes.

DISTINGUISHING UTILISATION METRICS FROM OUTCOME METRICS

Traditional presenteeism-based measures are outdated. The distinction between utilisation metrics and outcome metrics matters — and each informs a different but connected set of decisions. Utilisation data — desk occupancy, room bookings, peak attendance — tells organisations how space is being consumed and guides portfolio rebalancing. Outcome metrics — quality of deliverables, time-to-decision, client satisfaction, employee wellbeing — reveal whether the environment is enabling good work. Neither is sufficient alone; together they form the basis of a genuinely evidence-led hybrid strategy.



Protecting Real Estate Value

Hybrid working has fundamentally altered the calculus of real estate value — for occupiers managing complex multi-market portfolios and for landlords and asset managers seeking to remain competitive as tenant needs continue to evolve — and both must now treat portfolio strategy as a dynamic discipline rather than a periodic exercise.

REAL ESTATE STRATEGY MUST ALIGN WITH CORPORATE OPERATING MODELS

Many multinationals manage complex portfolios—owned offices, long leases and flexible spaces across multiple regions—and the risk is that real estate decisions are made on a cycle that is out of step with workforce planning. Aligning lease structures, space allocations and location strategy with operating needs, workforce geography and talent strategies is therefore essential. Options to consider include right-sizing headquarters footprints, creating neighbourhood subzones for cross-functional access, expanding satellite hubs near labour pools, and integrating flexible workspace providers into corporate portfolios to absorb demand variability without taking on long-term lease obligations.

ENHANCING THE VALUE PROPOSITION FOR LANDLORDS AND ASSET MANAGERS

For landlords and asset managers, the rise of hybrid work is both a challenge and an opportunity. Buildings that offer flexible space products and lease structures—shorter core footprints, plug-and-play coworking within buildings, transferable memberships to gyms and other wellness facilities nearby—are better positioned to attract and retain occupiers navigating hybrid demand. Enhancing building amenity and place-making through wellness, retail, hospitality and event programming amplifies the value proposition in ways that a purely transactional lease cannot replicate. Real-time building utilisation data and tenant feedback should inform asset repositioning and capital investment decisions, rather than relying solely on lease expiry as the trigger for strategic review.

LEASE INFLEXIBILITY AS A PORTFOLIO RISK

Long-term leases and mixed ownership structures complicate rapid portfolio adaptation. As hybrid norms continue to evolve, the mismatch between fixed commitments and changing space needs will become an increasing source of risk for both occupiers and asset owners. Scenario planning and blended landlord-occupier partnerships—where lease structures can flex alongside workforce patterns—will be critical to managing this exposure.

Practical Recommendations

FOR OCCUPIERS

- Develop a clear hybrid policy template with explicit expectations by role, meeting etiquette, minimum in-office requirements for specific functions, and measurement frameworks tied to business KPIs. Ensure leadership alignment and build in a roadmap for change management from the outset.
- Commission extensive data gathering—surveys, anonymised occupancy and booking analytics, heat maps—to define optimised workplace scenarios per business unit. Use these insights to rebalance space types and to inform lease and portfolio decisions.
- Shift to outcome-based performance metrics, measuring quality of deliverables, time-to-decision, client satisfaction, employee engagement and attrition—not only badge swipes and desk occupancy.
- Implement clear, role-sensitive expectations about who needs to be in, when, and why. Avoid blanket mandates that ignore meaningful differences in function, seniority and geography.
- Invest in simple, privacy-respecting tools for desk and room booking, colleague visibility and community coordination. Provide personal storage solutions to make desk-sharing more acceptable.
- Create a configurable digital platform combining desk and meeting booking, colleague presence indicators, community-building features and integration with HR and facilities. This provides the operational backbone for hot desking, capacity management and space utilisation insights.

FOR LANDLORDS AND ASSET MANAGERS

- Offer flexible space products and lease structures that reflect hybrid demand: shorter core footprints, plug-and-play coworking within buildings, and transferable memberships to wellness and amenity facilities nearby.
- Enhance building amenity and place-making—wellness, retail, hospitality, event programming—to amplify the value proposition beyond the lease and actively support tenant employee experience.
- Use real-time building utilisation data and ongoing tenant feedback to inform asset repositioning and capital investment decisions.

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The Executive Centre

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