INDUSTRY REPORT

The office isn't dying. The old rulebook is.

The Future Workplace Forum · FM & Work Design Days 2026.
Report produced by Osol.

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CONFIDENTIAL

LOCATION
Deauville, France

DATE
15 April 2026

ORGANISER
Republik Workplace

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CONTEXT

Context and Introduction

The Future Workplace Forum · FM *&* Work Design Days 2026

Republik Workplace · 15 April 2026 · Deauville

FM & Work Design Days is one of the most anticipated events in the French sector. Each year it brings together in Deauville the decision-makers of facility management, corporate real estate and workplace design around talks, site visits and exchanges that take stock of the real state of the office in Europe.

The 2026 edition opened with a substantive keynote built as a dialogue between two complementary viewpoints. Olivier Saguez, founder of the agency that bears his name and a leading figure in spatial design in France, brought a creator's perspective, attuned to aesthetics, brand and spatial experience. Maxime Cousin, CEO and co-founder of Osol, laid out a strategic, international reading of the office of tomorrow, informed by visits to some fifteen countries and a continuous immersion in the sector's debates across Europe, the United States and Asia. The interview was led and moderated by Sophie Distel, journalist and director of Republik Workplace.

This report captures the lessons of that opening session. It draws mainly on Maxime Cousin's contribution, whose analytical density and field cases lend themselves particularly well to a documented format. Olivier Saguez's perspective, more directly rooted in design practice, runs through it as an undercurrent in the examples and trends shared.

This report is not a transcript. It is a structured analysis, reshaped to be useful as a standalone read. Each section maps to a thematic block of the keynote, reorganised to serve the decision-makers who were not in Deauville.

Who it is for: Workplace Directors, Facility Managers, Corporate Real Estate leads, CIOs involved in workplace projects, design and architecture teams.

EXECUTIVE SUMMARY

Executive Summary

The office isn’t dead. The old rulebook is. What is disappearing is the generic office, the one copied identically from one site to the next with a 200-page playbook. What emerges in its place is more demanding and more interesting: an office that has to earn the presence of the people who use it, that roots itself in a local culture, and that learns from its real usage to keep evolving.

The opening keynote of the Future Workplace Forum set out this framework clearly and backed it with concrete cases from four continents. It also voiced a few uncomfortable truths: 70% of large companies’ AI investments produce no business value at all, for lack of a data strategy. Acoustic dissatisfaction has been stuck at 30% for fifteen years with no progress. And the debate about how many days to spend in the office is probably the most poorly framed question of the moment.

Key Takeaways

1 “Earn attendance.” The office is no longer a default destination. It competes directly with home and coworking. It has to prove its worth every single day.

2 The hierarchy of needs comes before everything. Connectivity, basic comfort, acoustics, light, air quality: these non-negotiable fundamentals must be sorted before investing in experience or inspiration.

3 The office is refocusing on what remote work cannot do. Learning by osmosis, complex collaboration with high emotional stakes, building culture and social connection.

4 Hybrid is no longer decreed, it is negotiated continuously. The organisations that succeed are not the ones with the clearest rule, but the ones with the most minimal framework.

5 70% of enterprise AI proofs of concept fail to scale. The cause: no data strategy. There is no AI strategy without a data strategy.

6 1 person in 5 is neurodivergent. Acoustic dissatisfaction has held at 30% for 15 years. Noise-cancelling headphones are not a solution: they are an abdication.

7 Data kills standardisation. The more you measure real usage, the harder it becomes to justify copying one site onto another. The technology meant to standardise becomes the strongest argument for the bespoke.

8 The turnkey office is dead. The office that learns from itself is being born.

“ ***The turnkey office is dead. The office that learns from itself is being born.*** *Maxime Cousin · Opening keynote · The Future Workplace Forum · Deauville, April 2026*

SECTION 1

1. The office in 2026: neither dead nor resurrected. Something else.

For five years, the public debate about the office has swung between two narratives, each as simplistic as the other. On one side, the announced death of the office, made obsolete by remote work. On the other, the triumphant return, symbolised by the sweeping return-to-office mandates of American multinationals. The reality on the ground is more nuanced and richer than either story.

JPMorgan's 270 Park Avenue is the most spectacular illustration. In October 2025, the largest bank on the planet opened its new global headquarters in New York. $4 billion invested. 60 floors. 10,000 employees. Architecture by Foster, interiors by Gensler. While part of the world kept announcing the death of the office, JPMorgan was placing the biggest corporate real estate bet of the decade.

KEY FIGURE

$4 billion Investment in JPMorgan's new global headquarters, 270 Park Avenue, New York. Opened in October 2025. 60 floors, 10,000 employees.

This is where the keynote's central concept comes in:

"Earn attendance."

The office is no longer a default place. It now competes with home, the café, coworking. It is a destination that has to prove its worth every day. If an office offers nothing that home or the corner café doesn't, people don't come in. And they are right.

The first way to earn attendance is to remove friction. The most polished offices in the world have all done the same thing: hunting down the micro-frictions of daily life. Not the big, spectacular things. The small, stupid ones that leave you going home exhausted at the end of the day without knowing why.

FIELD EXAMPLE

JPMorgan 270 Park · New York Biometric entry, no more badge to dig out. Coffee delivered to your desk with tracking. One app runs everything: wayfinding, services, booking.

FIELD EXAMPLE

Naver 1784 · Seongnam, South Korea (friction angle) Facial recognition that works even with a mask on: no badge anywhere. 100 robots deliver coffee, post and orders around the clock. AI-powered voice control launches meetings, transcribes and distributes the minutes. Nobody loses ten minutes plugging in an HDMI cable. It is the same obsession as JPMorgan, taken to the extreme. The full case (business model, digital twin, patents) is detailed in Section 4.

FIELD EXAMPLE

Sanofi · France A hospitality service inspired by grand luxury hotels, built in from the very design of the spaces. Here, people are the lever for removing friction.

FIELD EXAMPLE

Sage · 5 cities, 3 continents The “coffee strategy” is discussed from day one of the workplace project. Not as a logistics detail. As a strategic topic.

OSOL INSIGHT

The dumbest friction of all is the battery that dies mid-meeting. This is exactly what Osol tackles. Dead battery, missing cable, charger left at home: irritants that pile up and end up pinning people to one spot. Once you can no longer move freely around your office, you lose all the value of permeability.

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What remote work cannot do

The office no longer holds a monopoly on output. Everything once exclusive to the office (the tools, the files, the screens) is now at home too. People no longer come in to do what they could do anywhere else. They come for three broad categories of use that remote cannot reproduce.

- Learning by osmosis and imitation. The junior who sits next to a senior, watches them negotiate a contract, handle an unhappy client, settle a tricky call. Who picks up a thousand small gestures, intonations and reflexes that no training course could pass on. It cannot be learned over video. It is imitated, absorbed and reproduced through repeated contact.
- Complex collaboration with high emotional stakes. Settling a conflict, co-creating under pressure, making a hard decision as a group. Anything that calls for reading faces, silences and hesitations. In-person is still unbeatable for those moments.
- Building culture, connection and a social outlet. The best projects reconnect the office to the real business: Servier puts labs inside its offices, so research happens in plain sight. CMA-CGM in Marseille placed its offices facing the port, so the containers and the sea are part of every day. A company culture can’t be written into a charter. It is lived through rituals, lunches, coffee breaks and corridor conversations. And for many people, especially the youngest or those who live alone, the office is also a major social anchor in the week. Underestimating this is to miss one of the real reasons people come back.

Purely transactional work migrates home. And that is perfectly fine. The key to the office of tomorrow: stop treating people as one homogeneous block with generic expectations. Make room for people’s individuality within a well-designed space, where everyone finds what they need.

SECTION 2

2. The hierarchy of needs: the framework that puts everything back in order

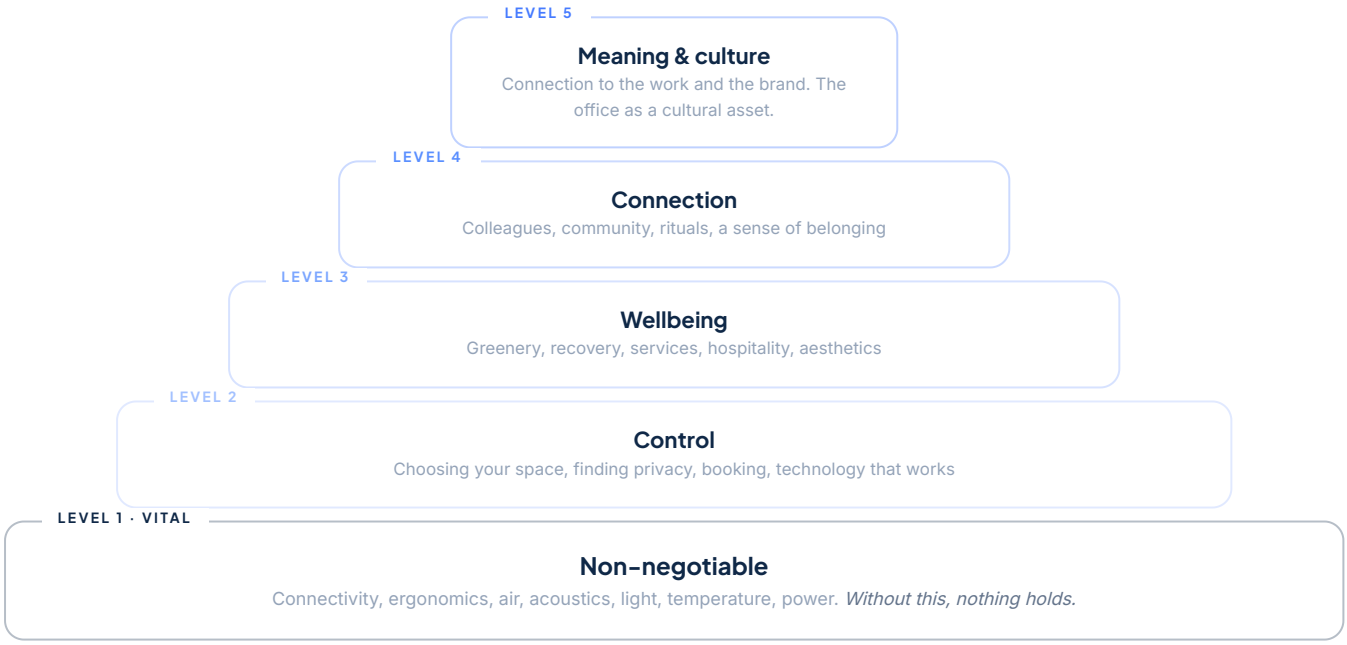
Before analysing the trends, a framework is essential. The office hierarchy of needs works like Maslow's: it is cumulative, not substitutive. Each level rests on the one below. Skip a step and you are building on sand.

Beware the classic misreading: the top is not a "nice-to-have". It is the whole point. The office is first a vehicle for culture, a strategic asset that embodies what a company is, what it stands for and how it works. That is what everything builds towards. Level 1 exists so that Level 5 can be reached. Not the other way around.

The problem is that 90% of companies try to paint the top before pouring the foundations. They invest in rooftops and brand murals while the acoustics fail, the meeting rooms are permanently booked out and people show up to meetings with a laptop on 12%. The result: an office that communicates well but does not hold up.

The pyramid is there to put things back in order.

KEY CONCEPT · THE OFFICE HIERARCHY OF NEEDS



It is cumulative. Not substitutive. Each level rests on the one below.

The trends that follow cut across all five levels. But they never erase the order. The pyramid is not a constraint. It is a compass. It simply says: before going anywhere else, make sure you are solid here.

THE 5 TRENDS

3. The 5 trends reshaping the office

Trend 1: The intentional office replaces the generic office

The end of copy-paste. The end of “one size fits all” and its 200-page playbook duplicated everywhere. Every space now has to be justified by a use, not by a standard. The workplace brief becomes a strategic exercise, not a technical specification.

In the best projects, a new role emerges: the “guardian of the brief”. Someone whose job is to protect the original commitments against the gradual erosion of value engineering, those cost trade-offs that distort a project between the brief and the handover.

FIELD EXAMPLE

Sage, 13 offices delivered in just 18 months across the globe. Every space radically different. And yet a single master reference document: 10 pages. Not 200. Perhaps more remarkable still: it was the brand team that led the project from the outset. The brand personality (bold, simplified, trusted, clear) guided every spatial decision, from furniture to signage. The office is no longer a real estate project dressed in brand after the fact. It is a brand project that unfolds in space.

KEY FIGURE

10 pages The size of Sage’s master document for 13 buildings across 5 cities. Most large companies operate with manuals of 100 to 200 pages.

The more specific the office becomes, the less its layout patterns can be guided by rules. They need to be guided by principles. Fewer pages, less technical detail. A handful of operating principles that steer choices case by case. The intentional office is governed by culture, not by procedure.

This paradox of the ultra-short master document is no accident. It is a signal of maturity. The organisations with the most experience in workplace projects are the ones that understood that over-prescriptive rules kill adaptation. The more mature you are, the more you free yourself from procedures and replace them with convictions. And convictions, unlike rules, apply everywhere, whatever the city, the budget or the local culture.

We also have to name the main enemy of the intentional office: value engineering. The process by which, between the ambitious brief and the final handover, every cost trade-off nibbles away a little of the original vision. The oak floor becomes vinyl. The acoustic partition becomes a standard one. The circadian lighting disappears. And six months after opening, people wonder why the office doesn’t look like what they imagined. This is precisely why the guardian of the brief role is strategic: someone must hold the explicit mandate to say no to every trade-off that betrays the intent.

ACTIONABLE TIP

Before launching your next workplace project, cut your brief down to 10 non-negotiable principles. Not technical specifications. Core commitments: what the office must enable, feel like and embody. Then appoint a guardian of the brief with an explicit mandate: the right to block any trade-off that contradicts those 10 principles, whatever the seniority of the person proposing it.

Trend 2: Experience at the heart of everything

An office is no longer designed as a container for workstations. It is designed as an experience. From the moment someone arrives in the morning to the moment they leave in the evening, every interaction with the place has to be considered. We used to optimise square metres. Today we orchestrate a journey.

A successful experience is first and foremost a seamless one. No friction at the door. No waiting for the meeting room. No hunting for a charger and a socket. No sluggish Wi-Fi. All those micro-irritants we ignored yesterday have become unacceptable today, because at home or in a good coworking space they simply don't exist.

From this pursuit of a seamless experience comes a broad convergence of codes. Offices borrow from residential design for comfort and warmth. From hospitality for service and attention to detail. From retail for sensory experience and staging. People now compare their office to their last hotel, their last Starbucks, their last flagship store. And they are right.

FIELD EXAMPLE

Sanofi Now recruits former hotel managers to run its sites. The workplace is treated as an experience-led discipline, not a property-management one.

A direct and quiet consequence: the workplace increasingly reports up to HR, no longer to finance. The objective changes. We no longer manage cost per square metre. We manage experience, wellbeing, retention.

KEY FIGURE

The maths has changed. A payroll costs ten times more than rent. A few extra euros per square metre to keep your best talent: the maths has never been simpler. Reason like that and every workplace trade-off changes.

This convergence of codes has a second consequence, less visible but fundamental: it dissolves the boundaries. Hotels host work. Retail flagships fold in coworking spaces. Coworking spaces look like boutique hotels. And corporate offices borrow from all these worlds at once. The workplace strategist of the decade is the one who can assemble these codes coherently, without it looking like a catalogue.

Singapore is ahead on this. Its new offices work on three axes at once: service, comfort, inspiration. Exactly like a good hotel. This movement is reaching Europe. The Workplace Directors and Facility Managers who anticipate it will be the ones able to defend higher budgets with their leadership, on a logic that goes beyond cost per square metre.

The organisational consequence is also worth watching closely. When the workplace becomes a matter of retention and employee experience, it naturally moves up towards HR. It is a quiet but structural shift. The Workplace Directors who have grasped this already speak the language of HR: engagement, employer brand, culture, onboarding. Those who stay in pure real estate logic will gradually find themselves bypassed.

ACTIONABLE TIP

Measure your people's satisfaction at every identifiable point of friction: arrival, booking, connectivity, catering, acoustics. Not with an annual survey. With a real-time tool. Then present your workplace investments in terms of retention, not cost per square metre. A single percentage point of turnover avoided can be costed. That instantly lifts the conversation to a more senior level.

Trend 3: The great return of the desk, but different

Over 2020 to 2023, we did the complete opposite of before. We removed the desks, removed the workstations, put sofas and cosy spaces everywhere. The apparent logic: if you come to the office to collaborate, what's the point of desks? Many companies now realise they went too far.

Because even when you come to the office to collaborate, you need moments of transition. An hour of quiet between two meetings to go back over a file. Thirty minutes to clear a few urgent emails. A quick video call. And there, the sofa no longer cuts it. Not ergonomic, not comfortable beyond twenty minutes, not suited to a screen. So the desk is coming back to offices.

But not for 8 hours of data entry like before. It returns as transition infrastructure between two collaborative moments. This is the fundamental shift, and it is what reconciles everything.

KEY CONCEPT

The desk as transition infrastructure Before: the desk is the main workstation. You spend 8 hours there. You produce there. Today: the desk is a comfortable stop between two interactions. An hour of quiet, a call, a few urgent emails. Not an assigned seat: a temporary anchor point. It is probably the best way to sum up where the office stands in 2026.

And this desk is radically different from the old one. Beautiful. Ergonomic. Almost residential. The inspiration no longer comes from the corporate office, the cubicles or the open-plan floors. It comes from hospitality and high-end residential. Because we finally asked the right question: why would anyone accept furniture at the office that they would never tolerate at home or in a hotel?

This shift has a direct consequence for how spaces are designed. The good office of 2026 is not a collaborative space with no desks. It is a space that builds in quality transition zones, distributed intelligently so everyone can find the environment they need at each moment of their day.

This return of the desk does not mean a return to the assigned desk. The flex-desk logic still holds. But the flex desk of 2026 is no longer a generic floor with identical tables from end to end. It is a varied range of postures and configurations, each suited to a specific use. High desks for short bursts. Dual-screen desks for analytical work. Semi-private spaces for calls. Each has its own characteristics, and it is up to the individual to choose the one that fits their moment of the day.

That is the real break with the previous period: we moved from a logic of seats (assigned or not) to a logic of activity. It is no longer "where do I sit?" that structures the space. It is "what am I doing for the next two hours?"

ACTIONABLE TIP

Audit the ratio of collaborative spaces to transition zones in your offices. If less than 30% of your floor area allows focused individual work, you have probably over-corrected after 2020. The field test is simple: watch where your people settle with headphones on. Those spots reveal the location of informal transition zones. Formalise them and equip them properly.

OSOL INSIGHT

Transition infrastructure demands mobile power. A transition desk is only useful if it is fully functional within seconds. Yet if someone arrives with a laptop on 30% and spends three minutes hunting for a socket, the transition fails before it even begins. This is exactly what Osol solves: a battery available instantly, anywhere in the space, with no cable and no socket.

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Trend 4: AI everywhere, but not the way you imagine

Today everyone talks about AI. But dig deeper and two radically different categories of deployment emerge: AI facing the employee, and AI behind the scenes. Both matter. And both depend on the same condition: a solid data strategy underneath.

AI facing the employee: finally an interface that understands

The transformation does not come from the classic vertical workplace apps (desk booking, room booking, visitor management), whose promise has often disappointed. The reality in most large companies is still 50 apps that don't talk to each other, each with its own login, its own logic, its own siloed data. Friction exactly where we wanted to remove it.

AI changes that equation. What emerges is a conversational intelligence layer that sits on top of all these systems and finally makes them accessible. People no longer search for a meeting room in a booking app. They say: "I need a room for 6 with a screen, near Sarah's desk, free on Thursday afternoon." And it works. They no longer hunt for the maintenance number on an intranet. They flag: "The air conditioning in Room C is too strong." The ticket is created, routed and handled.

We move from a logic of applications to a logic of intent. For the individual, the experience becomes radically smoother. For the Workplace Director and the Facility Manager, it is a source of data on real needs that previous systems could never produce.

What the intranet never managed in twenty years, a contextual AI assistant does in thirty seconds.

FIELD EXAMPLE

IKEA · presented at World Workplace Europe, March 2026 AI systems automate 47% of customer queries. The 8,500 agents affected were redeployed as in-store design specialists. The result: $1.4 billion in additional revenue.

KEY FIGURE

70% of AI investments lead nowhere. 95% of AI proofs of concept fail to scale, according to an MIT study. Only 28% of companies turn their AI investment into real value, according to an EY study (17,000 respondents). The cause: the data model behind it does not work.

FIELD EXAMPLE

ServiceNow · presented at the Workspace Design Show, London, February 2026 72,000 working hours saved in a year. Purely by automating the triage of workplace tickets. The equivalent of 40 full-time people freed up, for a company of 26,000 employees.

KEY FIGURE

70% of AI investments lead nowhere. 95% of AI proofs of concept fail to scale, according to an MIT study. Only 28% of companies turn their AI investment into real value, according to an EY study (17,000 respondents). The cause: the data model behind it does not work.

AI in the back office: the FM value chain transformed

The second category is less visible, but it is where the biggest gains are made. AI is quietly transforming the entire Facility Management value chain.

AI cross-references data that had never been connected: real occupancy, energy consumption by zone, ticket history, air quality, measured acoustics, booking behaviour. That cross-referencing produces, for the first time, a systemic reading of the building. We no longer manage by gut feel. We steer with data.

Then comes the operational chain. Generating stacking plans now takes 24 hours where it used to take a week. Ticket triage is automated: the AI summarises the problem, identifies the right contractor, routes the request and tracks the work. Predictive maintenance detects failures before they happen, on HVAC, lifts and security systems. Energy optimisation adjusts heating, cooling and lighting in real time according to actual occupancy. The result: fewer reactive interventions, less waste, fewer hidden costs.

And finally, the personalisation of spaces. This is where it becomes truly strategic. When usage data is clean and cross-referenced, AI can recommend space reconfigurations based on real behaviour. It can anticipate occupancy peaks and adjust services accordingly. It can identify under-used zones and propose alternative uses. This is no longer an office designed once and delivered for ten years. It is an office that constantly assesses itself and converges towards the optimum.

The real issue: data quality

All of this rests on a condition most organisations have not yet met. AI amplifies what it is fed: clean, integrated data and it produces actionable insight. Fragmented, stale data and it produces noise. It is a law of physics, not a technology problem.

On average 70 apps in a large company, 10 core systems, zero integration. HR data doesn’t talk to occupancy data. Occupancy data doesn’t talk to maintenance data. We have systems that capture everything but produce nothing coherent together. Everyone talks about AI. Nobody talks about data.

Three dimensions must be met at once: data quality, freshness, and integration across systems. It is not a one-off project. It is a living system that has to be maintained.

The organisations that succeed appointed someone dedicated to data integration before talking about algorithms. They did the thankless work of cleaning up reference data and interconnecting systems. That work never makes the headlines. But it is what decides whether AI produces value or not.

ACTIONABLE TIP

Before any workplace AI proof of concept, ask three questions: (1) Where is your occupancy, maintenance and services data? (2) Is it in systems that talk to each other? (3) Do you have someone whose sole mandate is to work on data integration? If you answer no to any of the three, stop the AI proof of concept. Invest in the data plumbing first. You will save time and money.

OSOL INSIGHT

Data is also what's missing to manage power across your spaces. The same logic applies to managing power and equipment. At Osol, every Pico generates usage data: who takes a battery, where, at what time, in which space. That data reveals the real movement flows in a building, not the declared ones.

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Trend 5: Sensory inclusion finally steps out of the blind spot

This is the fastest-rising trend, and the one handled worst. A striking figure: 1 person in 5 is neurodivergent today. Three years ago the figure was 1 in 7. Not because the population changed, but because diagnosis improved. What was yesterday an invisible minority is today a major statistical reality in every team.

KEY FIGURE

1 employee in 5 is neurodivergent. Up from 1 in 7 three years ago. The change comes from diagnosis, not from the population. Their number one challenge at the office: sound.

KEY FIGURE

30% acoustic dissatisfaction for 15 years. Measured by the Leesman Index. No progress in fifteen years. It is the dimension of the office with the worst score for the longest. Nobody really tackles it.

The standard answer is to hand out noise-cancelling headphones to everyone. That is not a solution. It is an abdication. It puts the responsibility for an environmental problem on individuals. And it doesn't even work for many neurodivergent people.

The real answer is sensory zoning. Intentionally designing zones with different sound profiles. Deliberate noise for collaborative spaces. Protected quiet for focus zones. Gradual transitions between the two to avoid sensory shock. The most advanced offices go further with reactive soundscaping: systems that adjust a zone's sound profile in real time according to its occupancy.

Giving people sensory control is probably the most under-used lever for making the office attractive again today.

An important clarification: silence is not the answer either. For many neurodivergent people, absolute silence amplifies anxiety and worsens tinnitus. What we are after is not silent spaces. It is spaces with a controlled, chosen sound profile. The difference is crucial for design.

The most advanced offices on this now display sensory heat maps at reception. Before settling in, people check the real-time noise level in each zone and choose their working environment accordingly. It is the workplace equivalent of choosing the hotel room with a view. And it is exactly the kind of control that transforms the lived experience.

For design teams: acoustics is not a fix. It is a design decision, on a par with light or circulation. When it arrives at the end of a project as a corrective measure, it costs more and works less well. The best projects we see build acoustic engineering in from the brief, not after handover.

ACTIONABLE TIP

Run a simple acoustic audit of your current spaces: measure the noise level by zone at peak hours. Compare against comfort standards (50-55 dB for focus spaces, 60-65 dB for collaborative spaces). Identify the two or three most problematic zones. Start there. No need to redo everything: gradual sensory zoning, even partial, produces measurable effects on satisfaction and footfall.

OSOL INSIGHT

The Power of Freedom. Your desk no longer needs a charger. Why should your other spaces? Docking stations freed the desk. Osol frees everything else. Meeting rooms. Work cafés. Agile zones. Training rooms. Auditoriums. A fleet of smart batteries secured by badge or app replaces cables, sockets and chargers throughout the building. No building works. No electrician. No disruption. *Adopted by 120+ large companies across 15 countries*

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GEOGRAPHIES

4. Geographies: Europe advances, Asia surprises, the world accelerates

The underlying trends are universal. But maturity, speed of execution and blind spots vary from one geography to another. These gaps are not cyclical. They are structural.

A point that may surprise: Europe is extremely well placed in this race. Our relationship with quality of life at work, our demands on employee experience, our less brutal approach to experimentation have become a real competitive advantage. It is something we tend to underplay in France. It is a reality the field confirms on every trip.

Paris vs. the regions

In Paris, and more broadly in the headquarters of large companies, you often find the most aesthetically ambitious workplace projects. Budgets are larger, design is brought in early, and the employer-brand dimension weighs more heavily: attracting talent in a more competitive labour market, hosting clients, embodying the company's image. These are legitimate reasons that push such projects towards greater ambition. In the regions, projects are often more pragmatic, more closely calibrated to immediate use, with tighter budgets and teams who will occupy the spaces they design themselves. That context naturally produces different choices. It is not a matter of opposing priorities or intentions. It is a matter of context and constraints. And the paradox worth remembering: the highest occupancy rates we observe are often in those regional sites, plainer but better calibrated to real use.

France vs. United Kingdom / Netherlands

France invented a role that exists almost nowhere else: the Workplace Director. Large companies bring this function in-house. In the UK and the Netherlands, a single real estate director covers 20 to 50 sites, and each site is run by an outsourced Facility Manager. The consequence: France has a more strategic, more creative, more experiential vision. The UK has more operational execution and generally more budget.

The United States: don't fall into the trap

JPMorgan. Apple Park. Amazon's Spheres in Seattle. We know these images. And we imagine that is the American office. It is not. These headquarters are concentrated in a few cities: New York, Boston, Chicago, Silicon Valley. The rest of the United States is pragmatic, dense, much closer to what we see in the French regions.

Asia: speed of execution and a case unlike any other

Asia follows a different logic, but it is not homogeneous. Speed of execution, density of spaces, a market set to be the largest in the world by 2031. But less focused on the individual experience than in Europe. Singapore is the exception: its new offices work on three axes at once (service, comfort, inspiration), exactly like a good hotel. It is a maturity the rest of Europe is now reaching.

But it is in Korea that the most fascinating case is found, and the most instructive for the future of the office. No longer through the friction angle raised in Section 1, but through a radically different one: the business model.

FIELD EXAMPLE

Naver 1784 · Seongnam, South Korea 168,000 m², 36 floors, 100 robots running around the clock. 316 technology patents filed in the building itself. The world's first building certified robot-friendly. The robots are run by a real-time digital twin of the building. Naver does not see this building as a cost. It sees it as a product. It sells it as a platform in the United States and to NEOM in Saudi Arabia. The office as a living test-bed, and as an exportable commercial asset.

Middle East: unlimited capital, maturity under construction

The fastest growth in the world, unlimited capital, outsized ambitions. Projects like NEOM are literally rewriting the rules of what a workspace can be. But a massive shortfall of human skills to support that growth. The technology moves faster than the organisations. It is a fascinating market to watch, but one whose models do not transfer directly elsewhere.

Africa: the leapfrog continent

Still largely behind European workplace standards. But with an enormous appetite and a capacity to leapfrog (a technological jump that skips stages) that is massively underestimated. The continent already did this with mobile banking and digital payments, skipping stages Europe took twenty years to clear. The same mechanisms could apply to the workplace. It is the market that could surprise over the next decade.

CONVERGENCE

5. Towards a dominant model? The opposite is happening.

You might think that with geographic gaps like these and an accelerating globalisation, a dominant model would eventually take hold everywhere. The opposite is happening. Three signals converge on this conviction.

Signal 1. Multinationals are abandoning the idea of a global model.

The strongest signal comes from where it was least expected: the most international companies. The ones with, in theory, the greatest interest in standardising to optimise costs, guarantee consistency and simplify management. They are doing the opposite.

The intuition behind this reversal is powerful: a 200-page prescriptive framework freezes decisions. It creates surface consistency but kills adaptation. A framework of 10 principles forces you to lean on convictions rather than rules. And convictions, unlike rules, apply everywhere while allowing radically different expressions depending on context. It is exactly the opposite of standardisation. And it is, paradoxically, what produces the deepest consistency.

Sage illustrates it perfectly: 13 buildings in 18 months, across 5 cities and 3 continents, with a 10-page master document. Each site is radically different in form. All are instantly recognisable in spirit. That is the difference between a rule and a principle: the rule says what to do, the principle says why. And once local teams understand the why, they no longer need to be told the what.

Signal 2. Local culture resists more strongly than you think.

The companies that attempted brutal return-to-office mandates in recent years have all felt it. Either they over-compensate, creating outsized projects like JPMorgan: when you impose the return, you are forced to justify the commute with a spectacular environment. The organisations that succeed are the ones that never needed to impose it, because the office already earned the trip.

The office is first a social fact, not a real estate fact. NXP, 35,000 employees across 40 countries: impossible to have a single hybrid policy. In France, when the boss says come in, people come in. In the Netherlands, they negotiate. In India, hierarchy plays out differently again. The best international HR directors have stopped trying to unify. They set a framework and let each country interpret it in its own way.

We also have to understand what happened during Covid. The psychological contract between employer and employee was quietly renegotiated. Many people restructured their lives around this new autonomy. Reversing abruptly with a top-down mandate breaks that contract. And it is paid for immediately in engagement, in retention, in trust.

Signal 3. Data and AI accelerate personalisation, not standardisation.

This is the most counter-intuitive argument. We assumed more data would produce more standardisation. It is the opposite. For thirty years we built standardised offices because we had no choice. Today we have the data. And what do we find? That every site is different. Take any given company with sites in several cities: by analysing its real data, it might discover that the occupancy peak in Lille falls on Tuesday morning while in Nice it is the reverse. That the phone booths that overflow in Paris sit empty in Bordeaux. Not because the people are different. Because the contexts, the teams, the work rhythms and the local cultures are. The more finely you measure, the less you can justify copying.

KEY CONCEPT

The data paradox The technology we imagined would standardise becomes the strongest argument for the bespoke. We used to treat every 50-year-old woman with the same medical protocol. Today, with personalised medicine, we adapt to the genome. The office follows the same trajectory. Data kills standardisation.

And beyond the global vs. local debate, the central issue lies elsewhere. We have to stop designing fixed offices. The goal is not to deliver a perfect office. It is to create offices that can evolve. That measure real usage. That converge towards the optimum over the life of the project.

CONCLUSION

Conclusion: what changes, starting Monday

The risk is not that we move towards a dominant model. The risk is that we keep designing generic offices while the world itself becomes ever more specific.

If you are a Workplace Director or Facility Manager

Audit your pyramid. Before any new project, check levels 1 and 2: connectivity, acoustics, air quality, thermal comfort. A budget spent on level 4 with a failing level 1 is a wasted budget. Appoint a “guardian of the brief” on your next project, whatever its size.

If you are in corporate real estate or CRE

Stop reasoning in cost per square metre. Measure what it costs to lose talent, and compare that to the cost of the square metre. And look at your data site by site before reproducing anything: every site is different, and the data confirms it.

If you are a CIO or IT Workplace Manager

Before launching an AI proof of concept, ask the data question. Where are your systems? Do they talk to each other? 70% of AI proofs of concept fail not because of the AI, but because of the data model underneath.

If you are an architect, designer or workplace consultant

The 200-page brief is dead. A document of 10 clear principles beats a manual of 200 rules. And build acoustics in from the design stage, not as a fix at the end of the project.

THE KEY MESSAGE

The office of tomorrow will not be universal. It will be situated. Cultural. Lived-in. And able to evolve. The turnkey office is dead. The office that learns from itself is being born.

OSOL INSIGHT

120+ companies have removed the cables from their hybrid spaces with Osol. Lower costs, more flexibility, and people finally free to work wherever they want.

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ABOUT

About

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An engineer and entrepreneur, Maxime Cousin co-founded Osol following a technology-transfer programme from the European Space Agency (ESA) and CNES. Since then, he has supported companies in transforming their workspaces and speaks regularly as an analyst and keynote speaker on workplace, the future of work and innovation in commercial real estate.

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About Osol

Osol has developed the first self-service network of smart batteries for the workplace. The company helps workplace, IT and real estate teams create more flexible and more cost-effective spaces: zero cables, zero chargers, zero building works. Made in Europe, present in 15 countries, deployed across more than 120 international companies.

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