WORKTECH26 ZURICH · RECAP

The Human Bottleneck
The 5-minute version

12 things to do differently after WORKTECH26 Zurich. One data point, one action and one pointer each. The full report has the cases, the quotes and the tensions.

Prepared by Osol and Sedus · October 2026 · Companion to "The Human Bottleneck", the full WORKTECH26 Zurich report by Maxime Cousin (Osol) and Sinem Beaujean (Sedus)

95%
Organisations reporting zero return on AI investment (MIT NANDA, 2025)

6%
AI high performers with more than 5% of EBIT attributable to AI (McKinsey)

80%
Respondents saying AI improved their individual productivity

Individual gains, collective stagnation.
As cited by Nina Indina, ETH Zurich
→ Session 13

THE VERDICT IN ONE PARAGRAPH

Zurich was the AI edition, and it ended on a sentence the vendors themselves agreed with: the technology is no longer the constraint. The constraint is human. Leaders less AI-literate than their teams. Managers who never open the tool. Buildings that nobody dares to use differently. And a second surprise for everyone who spent five years fighting empty floors: in the offices that work, the problem is now the full ones.

HOW TO USE THIS

The full report is a long read. Most people will not read it end to end, and some will feed it to an AI and ask for a summary. We did that work for you, with one difference: every learning below ends with a "Go deeper" line that tells you exactly where to look in the full report when you want the case behind it.

Part 1
Seven trends, numbered Trend 1.1 to Trend 1.7, plus a Special focus on On Labs, the Zurich headquarters of On, which we toured the day before the conference.

Part 2
Cross-session essays, each with its own title ("The ROI paradox", "What was not said", and so on).

Playbook
The Monday Morning Playbook, three or four actions for each profile, from workplace directors to HR.

Part 3
Thirteen session cards, one per talk, numbered Session 01 to Session 13.

So → Trend 1.3 → Session 08 means: read section 1.3 of Part 1, then the card of session 08 in Part 3.

Three sections worth reading in full

SPECIAL FOCUS

Inside On Labs

The full anatomy of one of Europe's most celebrated offices, visited the day before the conference: the story, the services, the culture designed in, and what the Workplace Experience team is fixing now that 1,300 people work there. Six things to copy, and what to anticipate.

→ Special focus, after Trend 1.3

PART 2 ESSAY

What was not said

No speaker put a number on what AI agents will do to space. The human cost of AI-intensified work ran in the parallel stream. And the mid-sized organisation was absent again.

→ Essay · What was not said

PART 2 ESSAY

Weak signals to watch

Candidates who apply with their own agents. Autonomous agents inside processes. Voice-first work. Fit-out as a service. Comparable environmental passports.

→ Essay · Weak signals to watch

AI is a change programme, not a deployment

01 Access does not create adoption

DATA

SIX Group gave Copilot to all of its roughly 4,500 internal users. About 20% of users generate about 40% of prompts. Around 5% never open it. Senior leaders often have the licence and never use it.

DO THIS

Segment users by behaviour, not by department: power, regular, inactive, leaders. Make the base training compulsory. Nudge daily, five to ten minutes at a time. Publish one rule: "You don't use it, you lose it." Reallocate unused licences.

GO DEEPER → Trend 1.1 → Session 04

How SIX went from 20 licences to the whole company, and the ROI case it had to abandon on the way.

02 The blocker sits at the top and in the middle

DATA

Microsoft names leadership AI literacy as one of the biggest blockers, and says literacy is higher among individual contributors than among M2, M3 and top leadership. The lever is the engaged first-line manager, the "M1".

DO THIS

Do not approach executives with workshops. Train their chiefs of staff and assistants first, and let the ecosystem pull them in. Then put your effort on M1s: an engaged M1 is where Microsoft sees teams go "into overdrive".

GO DEEPER → Trend 1.1

→ Essay · The same film, second screening

Why the manager who slows Copilot is the same one who keeps people at their desks, and how to run both changes as one programme.

03 Do not give your agents names

DATA

In a BCG experiment, managers reviewed an error-filled document. Those told it came from an "AI employee" called Alex 3 caught the fewest errors, felt less responsible and trusted the work less.

DO THIS

Show agents on org charts as tools with a human owner, never as colleagues. Budget the handover like offshoring: train, run in parallel, hand over, monitor. Count a year, not a week.

GO DEEPER → Trend 1.1 → Session 03

BCG's three moves of AI-first work redesign: tasks, talent, organisation.

04 Time saved is not headcount saved

DATA

BCG's simulation of the US labour market: 50 to 55% of jobs reshaped within two to three years, 10 to 15% vulnerable over four to five years or longer, 35% with limited impact. A client that automated half of recruiting and cut recruiters by 30% may need more recruiters in three years, not fewer.

DO THIS

Before any "time saved" calculation becomes a headcount decision, model growth, attrition and retirements. Write two plans: one where AI works as expected, one where it does not.

GO DEEPER → Trend 1.2 → Session 03

The customer service team that cut 30%, watched the rest leave, and had to rehire.

The office is back, and the maths has changed

05 Headcount is no longer a safe denominator

DATA

Microsoft says its revenue grew 57% over three years with headcount flat since 2022. A vendor claim, not an audited figure, but the direction matters. The Bank for International Settlements is designing a new tower in Basel, its first project of this scale in more than 60 years, without knowing what AI agents will do to its capacity needs.

DO THIS

Add an agent scenario to your next portfolio review. Model three cases per major site over five years: headcount-led growth, flat headcount with higher activity, contraction. Favour the decisions that survive all three: shorter commitments, convertible floors, furniture you can move.

GO DEEPER → Trend 1.2

"The denominator problem": every space standard in Europe divides something by headcount, and why the first teams to replace that anchor will own the conversation with the CFO.

06 The office is full. Fix the rush hour, not the attendance.

DATA

CBRE figures quoted by ROOMZ: 53% average utilisation, 80% at peak, 111% of seats allocated against seats available. 68% of employees come in primarily to collaborate. Lombard Odier's 2,000 m² of collaborative space was full after two days. Even On Labs, after a sixfold headcount growth, is now working through ghost bookings and desk hoarders.

DO THIS

Pull booking and badge data for Tuesday to Thursday. Count ghost bookings (rooms booked, nobody present) and desks held by an absent laptop. Switch on automatic room release with a clear rule and a grace period. Make existing rooms bookable on the spot from the door. Then make every space workable, meeting rooms between bookings included.

GO DEEPER → Trend 1.3 → On Labs focus → Session 08

The rush hour toolkit, none of which requires a new building, and the full anatomy of On Labs: villages, trail, unlocked lockers and the fine-tuning now under way.

07 Two questions beat fifty. And wait before you ask them.

DATA

SAP steers a global portfolio on two survey questions: how people feel about the space, and whether they believe it makes them more productive. Roche records a 12% average gain in user perception after each project that follows its change protocol. Satisfaction drops first, every time.

DO THIS

Add the two questions to every post-occupancy and pulse survey. Track them by site. Do not read them before three to six months after a move, and ask users not to change the space in that window (Bühler's rule). Present them to the executive committee next to cost per seat, not instead of it.

GO DEEPER → Trend 1.4 → Session 05 → Session 06

"The corridor of no": a hundred metres of union posters at the UN in Geneva, and what happened when the most reluctant teams were offered their old offices back.

08 Lead with value, not with data

DATA

The room named measuring the ROI of workplace investment as the biggest gap in its strategy. The same room, hours later, said human value will define the workplace (83%) far ahead of financial value (30%). Workplace leaders believe the value is human. Their executives ask for financial proof.

DO THIS

Stop opening the conversation with occupancy data. Sum your contribution across finance, HR and marketing into one story, told in business terms. Peter Baumann (SAP): lead with data and you negotiate workstations; lead with value and you are invited.

GO DEEPER → Trend 1.4 → Essay · The ROI paradox

Why SIX stopped trying to prove Copilot's ROI, and what Roche's ten years of consistent data make possible instead.

Design for change, and for how people feel

09 Fixed shell, mobile everything else

DATA

A brief for PwC grew from about 45 to about 120 people in a few weeks. Fixed systems take four to five months and a procurement cycle to reconfigure. In Stephan Hürlemann's comparison, the flexible fit-out came out cheaper, and its elements keep their value: they can move, be reused or be sold.

DO THIS

For your next fit-out, list every element that will be fixed to the building and challenge each one: could it move? Keep identity, acoustics and functions in what moves. Then ask your CFO the question SAP asked on stage: could this layer be leased to protect cash flow?

GO DEEPER → Trend 1.5 → Session 07

The rock reception desk that is "easier to move the building than", and how micro-architecture frees the ceiling.

10 Mode is not mood

DATA

In a German auditing firm, SOA Soundarchitecture designed music, silence and nature soundscapes zone by zone. Disapproval fell to 3%, where opinions on the office coffee usually split fifty-fifty. Most offices sound the same in every zone.

DO THIS

Do a blind walk of your office, or record ten minutes of sound in each zone. If the café, the open plan and the quiet area sound alike, your zoning exists only on the plan. Start with one zone: define its intended mood, then its sound, then test approval with the people who use it. Give neurodivergent colleagues a range of environments and the freedom to move: for some, silence is the problem.

GO DEEPER → Trend 1.6 → Session 12

The weak signal from our workshop table: what happens to the open plan when half a floor dictates to AI all day.

11 Start with the place everybody uses

DATA

Bühler's ten-year, CHF 120 million campus transformation began with the staff restaurant. Lombard Odier gave its best lake views to collaboration, screened World Cup matches at 5:30 a.m. with croissants, and runs a fitness centre with 450+ subscribers and no subsidy. On Labs offers one free barista coffee a day. Booking.com's real estate team found the first reason people come in is to meet at least three favourite colleagues, far ahead of anything else.

DO THIS

Pick the one space every employee uses and make it your first visible project. Use the cheap engagement levers before the strategy deck. Then put the technology at the service of those places, not the other way round.

GO DEEPER → Trend 1.7 → Session 06 → Session 11

Lombard Odier's five early lessons from operating a smart building with 25 best-of-breed solutions, a digital twin and 250,000 data points.

12 AI hears the remote participant better than the one in the room

DATA

In Teams, Copilot knows who is speaking and can say who agreed. In a physical meeting room it often cannot. SIX: "On-premises systems are not seen as equal by all of our employees to our online experience." After five years of fighting for meeting equity, the hierarchy may flip.

DO THIS

Write the AI spec for your meeting rooms: one join experience in every room (Lombard Odier cut IT support requests sharply with this), speaker identification, automatic release of unused bookings, availability at the door, power at every seat. Then test whether an in-room meeting leaves as good a digital trace as a Teams call. And before you open agents widely, put a monthly token budget in place: AI is no longer flat rate.

GO DEEPER → Essay · AI hears the remote participant better → Essay · The IT and digital workplace verdict

Four lessons for IT, including why FinOps is now a workplace topic.

Your Monday morning, by profile

Two moves each, with the number of the learning behind them. The Monday Morning Playbook in the full report has three or four per profile.

Workplace directors

Own the rush hour and the places people come for.

06 Measure your rush hour before you redesign anything.

Pull Tuesday to Thursday booking and badge data. Count ghost bookings and desks held by an absent laptop, then switch on automatic room release with a grace period.

11 Fund the places where people meet first.

Pick the one space every employee uses, the restaurant, the café, and make it your first visible project. Technology comes after, at the service of those places.

Corporate real estate leaders

Make portfolio decisions that survive AI.

05 Add an agent scenario to every portfolio decision.

Model three cases per major site over five years: headcount-led growth, flat headcount with higher activity, contraction. Favour shorter commitments and convertible floors.

08 Start the business conversation with value, not workstations.

Sum your contribution across finance, HR and marketing into one story, in business terms. Lead with data and you negotiate seats; lead with value and you are invited.

Facility managers

Measure less, wait longer, engage cheaply.

07 Adopt the two-question index and freeze the space after a move.

How do people feel about the space, and does it make them more productive? Track by site, read results only after three to six months, and ask users not to change the space in that window.

11 Use the cheap engagement levers.

A free barista coffee, a match screening at dawn, a fitness corner. Small, visible gestures do more for attendance than the strategy deck.

IT and digital workplace leaders

Run AI as a change programme, and spec the rooms for it.

01 Segment AI users by behaviour and reallocate unused licences.

Power, regular, inactive, leaders. Make base training compulsory, nudge daily in five to ten minutes, and apply one rule: you don't use it, you lose it.

12 Write the AI spec for your meeting rooms and set a token budget.

One join experience in every room, speaker identification, availability at the door, power at every seat. Then cap monthly tokens before you open agents widely.

Architects and designers

Design for a building that keeps changing.

09 Design the fixed layer to be neutral and put identity in what moves.

Challenge every element fixed to the building: could it move? Keep identity, acoustics and functions in the mobile layer, and ask whether that layer could be leased.

10 Do a sound map before a furniture plan.

Record ten minutes in each zone. If the café, the open plan and the quiet area sound alike, the zoning only exists on paper. Define mood, then sound, then test approval.

HR leaders

Treat people, managers and agents as one change.

02 Run AI adoption and workplace change as one programme.

One network of champions. Train executives' chiefs of staff first, then invest in engaged first-line managers: they are where teams go "into overdrive".

03 Do not give your agents names.

Show agents as tools with a human owner, never as colleagues. Budget the handover like offshoring: train, run in parallel, hand over, monitor. Count a year, not a week.

53% Average utilisation

80% Peak utilisation

111% Seats allocated vs available

The office problem of the next five years is saturation.

CBRE 2026, via ROOMZ → Trend 1.3

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"The Human Bottleneck"

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