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CONFERENCE REPORT · WORKTECH ZURICH 2026

The Human Bottleneck.

The technology is ready. The organisations are not. Workplace intelligence, AI adoption and the crowded office. Key trends, field cases and actionable lessons from Worktech Zurich 2026.

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INDEPENDENT ANALYSIS

COVERAGE	CONFERENCE	WORKPLACE TOUR	AFTER-EVENT TOUR	ORGANISER
13 sessions · 19 speakers	30 Sept. 2026 · Microsoft Zurich, The Circle	On Labs HQ	Novu Campus	Worktech Events

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FRAMING

Context: why this report exists

Worktech Zurich 2026 · Worktech Events · 30 September 2026 · Microsoft Zurich, The Circle

Worktech Zurich 2026 took place on 30 September 2026 at Microsoft Zurich, inside The Circle, the building complex next to Zurich Airport. Microsoft hosted the day. Part of the global Worktech series, the event brought together around 100 senior professionals: workplace (25%), real estate and facilities (21%), technology (20%), architecture and design (16%) and HR (9%). One day, 13 sessions covered, 19 speakers, an interactive workshop run in two parallel rooms, a workplace tour of On Labs, the global headquarters of the Swiss sportswear brand On, the afternoon before, and a flexible-workspace tour at Novu Campus over drinks once the conference closed.

The venue itself made a point. The Circle is Microsoft's largest office in Switzerland. The host told the room that the company has around 1,200 employees in the country, most of them assigned to this office, and that desks have become harder to catch "now that people voluntarily actually love coming back to the office." The day before, we had heard a similar story at On Labs, where around 1,300 people now work in the Zurich tower. On grew so fast that the Workplace Experience team's first job was to keep up. Now it is optimising the way the building runs to push the experience further. Busy offices turned out to be one of the threads of the week.

This is not a session-by-session summary. We read the day as a whole. We crossed the 13 sessions, the live audience polls, the slides shared, our notes from the workshop we took part in, and the On Labs tour we took together, to extract the convergences, the contradictions, the weak signals and the lessons you can act on. It is written for the people who run, design or sign off on workplaces in Europe: workplace directors, corporate real estate leaders, facility managers, IT and digital workplace teams, architects and HR leaders.

A few months ago in Rotterdam, AI barely registered on stage. In Zurich, it saturated the morning. Microsoft, BCG and SIX Group opened the day on AI adoption, and the afternoon kept coming back to it. But the striking thing is where every AI conversation landed: not on models, not on features, but on people, habits, managers and organisations. That is the bottleneck this report is named after.

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WHY OSOL AND SEDUS PUBLISH THIS REPORT

Two partners, two physical layers, one question

Osol and Sedus equip the two physical layers people touch all day at work: the energy that powers their devices, and the furniture that supports their bodies and their focus. If the bottleneck of the next workplace is human, it shows up there first: in a meeting room nobody can work in, a seat that does not adapt, a zone that does not feel right. We attend the major workplace events together, compare what we hear on stage with what we see on our clients' floors, and share the result. Maxime wrote this report. Sinem co-analysed the sessions and the On Labs tour, and brings Sedus' perspective on inclusion and human-centred design. The report is independent and freely distributable.

SESSIONS ANALYSED

13

Keynotes, panels, a workshop and case studies across one conference day

SPEAKERS

19

Microsoft, BCG, SIX, Roche, SAP, the BIS, Bühler, Lombard Odier, ETH Zurich and more

WORKPLACE TOURS

2

On Labs HQ the afternoon before, Novu Campus after the conference closed

An editorial note on perspective. The event took place in Zurich, but the stage was not a Swiss stage. Many speakers carry global or EMEA scopes: Roche's real estate transactions worldwide (around 100,000 employees), SAP's global real estate and facilities organisation, a Munich-based Gensler principal, BCG's global workforce research, Microsoft's Work Trend Index (20,000 professionals in ten markets, according to the speaker), Bühler's projects from India to Mexico, the BIS as an international institution. What they said is an international view, heard in Zurich. It is not a portrait of the Swiss market. What the room did add is a particular mix of organisations: family-owned industrials with a very long horizon (Bühler has had seven CEOs in 166 years), international institutions with strong staff representation (the BIS in Basel, the UN in Geneva) and heavily regulated finance (SIX, Lombard Odier). One local signal stood out: Microsoft claimed that Swiss organisations lead the world in Copilot penetration among its large accounts. The return to the office was less in focus than in Rotterdam. That does not make it a settled question. The question has moved on: not whether people come in, but how the office copes when they do (1.3), and what AI changes in the work they come in for.

A NOTE ON COVERAGE

In the afternoon, the programme split into two parallel streams. We attended the workplace design stream, so two sessions of the AI stream are not covered: the Swiss Re fireside chat on AI adoption (Gabriel Schaepman, Bence Orban) and Sylvain Rottier's session on decision density. Figures quoted from vendors are attributed to them and presented as their claims. Quotes are lightly edited for readability.

HOW TO READ THIS REPORT

Part 1 distils the day into 7 mega-trends, each crossing several sessions, with quotes, data and field cases. A Special focus walks through On Labs end to end. Part 2 reads between the sessions: paradoxes, weak signals, absences. The Monday Morning Playbook turns it all into actions per profile. Part 3 holds the 13 session cards for reference.

FRAMING

Executive summary

Worktech Zurich 2026 was the AI edition, and it delivered a verdict the vendors themselves agreed with: the technology is no longer the constraint. The constraint is human. Leaders who are less AI-literate than their teams. Managers who never open the tool. Employees who will not change habits because someone sent a training link. Organisations still structured the way they were 40 years ago. The same goes for buildings. The three that impressed us most (Bühler, Lombard Odier, On) all combine serious technology with two things that are harder to buy: places people want to be in, and the patience to let them get used to change. Two shifts deserve the attention of every real estate decision-maker. First, growth is decoupling from headcount, which breaks the oldest assumption in space planning. Second, in the offices that work, the problem is no longer empty floors. It is full ones. It is saturation.

Key takeaways

1 **AI access does not create adoption.** SIX gave Copilot to its whole workforce and learned that licences change nothing until people see what is in it for them. Their rule now: "You don't use it, you lose it." Adoption is a habit programme, not a deployment.

2 **AI gets stuck at the top and in the middle.** Microsoft names leadership AI literacy as one of the biggest blockers. The lever is the first-line manager (the "M1"). Reach executives through their chiefs of staff and assistants, not through workshops.

3 **Headcount is no longer a safe basis for space planning.** Microsoft says its revenue grew 57% in three years while headcount stayed flat. BCG warns that 30% of time saved is not 30% fewer people. The BIS is designing a tower without knowing what agents will do to its space needs. Plan portfolios on scenarios, not headcount projections.

4 **The office is back, and it is crowded.** Figures from CBRE quoted by ROOMZ: 53% average utilisation, 80% at peak, 111% of seats allocated. The new irritants are ghost bookings, desk hoarders and meeting rooms used as phone booths. Even On Labs, where a strong culture and people experience carried the office through hypergrowth, is now working through them one by one to remove the last irritants.

5 **Two questions beat fifty.** SAP cut its global workplace survey to two 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. Measure how people feel, and let them settle in for a few months before you run the survey.

6 **Change has a dip. Plan for it.** Satisfaction drops after every move. SAP, Roche, the BIS and Bühler all say the same thing: be patient, quantify feedback, and do not redesign in the first three to six months.

7 **Build for change, not for eternity.** A designer watched a brief grow from 45 to about 120 people in a few weeks. His answer: mobile micro-architecture, minimal fixed fit-out, furniture that keeps its value. SAP's real estate strategy lead added the CFO angle: lease it and protect cash flow.

8 **Start with people, then let technology serve them.** Bühler renovated the staff restaurant first. Lombard Odier gave 2,000 m² of lake-view space to collaboration, full in two days, and backed it with one of the most advanced smart building set-ups presented on the day. On built a culture strong enough to carry its office through a sixfold growth in headcount. The building sets the stage. People decide whether the show works.

STATEMENT · WORKTECH ZURICH 2026

> “The minimum standard of facilities management is total perfection.

Alex Wilkins
Global Lead, Real Estate Transactions, Roche

PART 1 · STRATEGIC SYNTHESIS

7 mega-trends from Worktech Zurich 2026.

What emerges when you lay 13 sessions, live polls and two workplace tours side by side.

1.1 The technology is ready. The organisations are not.

1.2 Token capital: when growth stops needing headcount

1.3 Rush hour: the office is back, and now it is full

1.4 Less data, better questions

1.5 Built for change

1.6 Mode is not mood

1.7 People first, technology in service

PART 1 · TREND 01

1.1 The technology is ready. The organisations are not. 01

The morning opened with three AI sessions in a row: Microsoft, BCG, SIX Group. A vendor, a consultancy and a client. You would expect three different stories. They told the same one.

Microsoft: the blocker is leadership literacy. Jan Medřický (AI Business Solutions Sales Lead, Microsoft) presented Microsoft's Work Trend Index and its "Frontier Firm" narrative: three phases, from AI that gathers information, to simple agents that execute tasks on request, to proactive agents embedded in processes that make decisions and trigger workflows. Microsoft, he said, is moving from phase two to phase three, and has just introduced what it calls "autopilot", autonomous agents designed to operate inside business processes. Then he turned to what blocks the journey, and it was not the technology.

> *"One of the biggest blockers for a good adoption of AI is leadership AI literacy. I would even say that AI literacy is way higher among individual contributors than among M2, M3 and top leadership."*
>
> Jan Medřický · AI Business Solutions Sales Lead, Microsoft

His prescription has two parts.

One: give people time to learn, inside working hours. He described a Microsoft practice of reserving Fridays for learning, then admitted with candour that managers fill those Fridays with one-on-ones.

Two: target the first-line manager. Leadership sets the direction and the pace, he said, but "it's the M1s, and there we need the engagement. If we have an engaged M1, that's where we see the organization really going into overdrive." An attendee added the most practical tip of the morning: do not approach leaders directly with the change. Work through the people around them, their chiefs of staff and assistants. Change the literacy of that ecosystem, and leaders have no choice but to follow.

BCG: slower than you think, because of people. Orsolya Kovacs-Ondrejkovic (Partner and Associate Director, People Strategy and HR, BCG) brought the counterweight to the media narrative. Her first slide set the frame: global labour productivity growth (ILO data) has shown no clear acceleration through broadband, the iPhone, cloud computing, machine learning or ChatGPT.

> *"Technology has always replaced tasks and jobs. But it hasn't replaced work."*
>
> Orsolya Kovacs-Ondrejkovic · Partner and Associate Director, People Strategy and HR, BCG

Her team's simulation of the US labour market de-averages the panic.

RESHAPED

50–55%

Share of US jobs that AI will reshape over the next two to three years (new skills, new activities)

VULNERABLE

10–15%

Vulnerable to elimination over four to five years or longer

LIMITED IMPACT

35%

Contextual, relationship-driven, hands-on work

Augmentation spreads fast. Substitution takes longer, because it requires formalising tacit knowledge, redesigning workflows end to end and integrating systems. Source: BCG Henderson Institute analysis (Revelio Labs, O*NET, US Bureau of Labor Statistics), presented by Orsolya Kovacs-Ondrejkovic.

The second reason the impact is overstated is speed: adoption takes a long time, “mostly due to people factors”. In a BCG executive survey, 78% of companies said they use AI widely and expect it to reshape roles, and nearly the same share said they are not good at managing the workforce change that follows. Her sharpest line was for the standard rollout, the one where everyone gets a licence: “It’s nice if we can give everyone a copilot, but that is going to save enough time to maybe have a coffee.” Real value comes from redesigning the work itself.

KEY CONCEPT

The three moves of AI-first work redesign (BCG)

1. **Tasks.** Map the 40 to 50 activities of a function and decide, consciously, which ones should always stay human-led (grievances, restructuring), which can go fully to agents (payroll processing), and which keep a human in the loop. Two clients will make different choices. The mistake is not choosing.
2. **Talent.** Old-fashioned strategic workforce planning still applies. Model capacity, attrition and growth before concluding that time saved means fewer people.
3. **Organisation.** Expect a flatter, more centralised structure where some of the work is delivered by agents. Make agents visible on org charts as tools, not as colleagues.

What SIX learned the hard way. Mark Jenkins (Head Digital Workspace, Executive Director, SIX Group) runs the digital workplace of the company behind the Swiss stock exchange and the country’s payment infrastructure. His opening line reset the morning: “Tech is pretty easy.” The hard part is “what’s in it for me”.

SIX’s journey ran in waves. Twenty Copilot licences in July 2024 for the tech team and “friends and family”. 120 users by February 2025, slowed down because management kept asking for a return on investment the team could not prove (more on that in Part 2). A jump to 1,500 users with the next Microsoft enterprise agreement, after compliance, security and penetration testing. Then a rollout to every internal user, about 4,500 people, because demand from the floor became impossible to contain.

FIELD CASE

SIX Group: what changed adoption

- **Usage segments, not one population.** High-volume users (about 20% of users) generate about 40% of prompts. A middle group of roughly 60% uses Copilot every other day, mostly in dialogue mode, and is the target for second-level skills. About 5% stay inactive. Senior leaders often have the tool and never open it: assistants and one-to-one coaching are the way in.
- **Local allocation.** Power users decide, team by team, who gets which access, training and licence.
- **Mandatory base training** for the first 1,500 users, even if the company is “not allowed to say mandatory”.
- **Daily nudges and micro-learning**, five to ten minutes at a time, plus community topics.
- **“You don’t use it, you lose it.”** Persistently unused licences are reallocated to partners and affiliates.
- **A Copilot Day** in August 2026 at the Zurich convention centre, streamed to the rest of the company, with about 900 participants, more than 20% of employees.

His closing lesson applies far beyond Copilot: “Don’t just give them a tool, don’t just give them a training, and hope they’re going to use it.” And the next phase raises the stakes. Agents are no longer flat-rate, so SIX is building a team to support co-building, tracking and token optimisation before opening the agent world to everyone.

ETH: why you cannot install a mindset. In the closing keynote, Nina Indina (Program Director, Digital Twin, VP Infrastructure and Sustainability, ETH Zurich) put numbers on the gap. She cited the MIT NANDA report (2025): despite 30 to 40 billion dollars of corporate spending, 95% of organisations surveyed reported zero return on their AI investment. A newer McKinsey study shows only 6% of organisations qualifying as AI high performers, with more than 5% of EBIT attributable to AI, a share that stayed flat year on year, while 80% of respondents say AI improved their individual productivity. Individual gains, collective stagnation.

Her explanation starts in the brain. Of roughly 10 million bits of information perceived every second, about 40 reach conscious awareness*. People do not evaluate change objectively. They filter it through what they know and what could threaten them, and, following Kahneman and Tversky, they feel losses about twice as strongly as equivalent gains. Transformation threatens identity, not only processes.

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* Nina cited around 11 million bits of information perceived every second, with only around 40 consciously processed. We have slightly adjusted this formulation based on the neuroscience framework used in Sedus' Limbic Office approach, which distinguishes between sensory channels: approximately 10 million bits per second through vision, 100,000 bits through hearing and 1 million bits through the skin, with around 40, 30 and 5 respectively reaching conscious awareness. A small nuance, but an important one in the fact-checking era.

> *"How do you change a mindset? If you think about it longer than two seconds, you're like, okay, that's impossible."*
>
> Nina Indina · Program Director, Digital Twin, ETH Zurich

Her replacement for the classic triad of "mindset, communication, training" is concrete.

- **Relevance**: help people do what they already want to do, and make them feel successful.
- **Narratives**: communication is the effect of what you say, not what you said, so listen to the stories already circulating and work with them.
- **Access**: learning comes from experience, not classrooms, and "nothing accelerates change more than the visible reality", so find the places where change is already happening and make them visible.

One counter-intuitive finding about agents. BCG ran an experiment in which managers reviewed a document full of errors. One group was told an AI tool produced it, another that a colleague called Alex did, a third that an "AI employee" called Alex 3 did. The third group caught the fewest errors, felt less responsible and trusted the work less. Kovacs-Ondrejkovic's conclusion: "Don't give them names." Show agents on org charts for transparency, but as tools a human orchestrates. An attendee pushed back: train an agent as you would train an employee, or you get "a dummy". On the effort, both are right. BCG's comparison: handing work to agents is like offshoring a function. You train, you run both in parallel, you hand over, you monitor. Count a year. Most companies count a week, because "it's AI, it's like magic".

ACTIONABLE · RUN AI ADOPTION LIKE A WORKPLACE CHANGE PROGRAMME

Segment users by behaviour (power, regular, inactive, leaders). Allocate access locally through power users. Make the base training compulsory. Nudge daily. Reallocate unused licences. Reach leaders through their assistants and chiefs of staff. If you have ever rolled out activity-based working, you already know this playbook. It is the same one, with a different tool.

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PART 1 · TREND 02

1.2 Token capital: when growth stops needing headcount

02

The idea with the biggest consequences for real estate came out of a Microsoft sales talk. Almost nobody in the room connected it to buildings. We did.

A third line on the balance sheet. Jan Medřický described AI as a triangle. For decades, organisations had two lines: human capital, augmented by technology. Now there is a third: "token capital", the digital workforce of agents, paid for in tokens. He invited the room to translate its HR vocabulary: FTEs become tokens, salaries become the cost of intelligence, org charts become agent portfolios, and the key metric becomes cost per outcome.

> *"You can think about FTEs as tokens. You can think about salary as the cost of AI intelligence, the cost of tokens."*
>
> Jan Medřický · AI Business Solutions Sales Lead, Microsoft

Then came the number. Historically, he said, growth was tied to headcount: ask a manager to grow and the first question is "how many more people do I get?" According to Medřický, Microsoft's headcount has been flat since 2022 (layoffs on one side, hiring on the other, net one person up), while revenue grew 57% over the last three years. Asked from the floor whether that figure was net of token costs, he clarified that it was revenue, not margin, and that Microsoft is still in a heavy investment phase.

+57%

revenue · flat headcount

Growth without hiring

Microsoft's revenue growth over three years with headcount flat since 2022, as presented on stage. A vendor claim, not an audited productivity figure. But the direction is what matters for space planning.

Source: Jan Medřický, Microsoft

The bill arrives. The audience brought the cost side. One attendee described the token problem bluntly: model costs, the depreciation of older models, answers that consume huge volumes of tokens. Another, from a global real estate advisory firm, admitted that she outsourced a pile of slide production to AI and burned through her credits in four days. Medřický's answer was FinOps: move from unlimited use to monthly token budgets, track cost per task, and then cost per outcome. Mark Jenkins confirmed it from the client side: with agents, AI is "not flat rate" any more. Token capital is capital you pay for every month.

30% of time saved is not 30% fewer people. Orsolya Kovacs-Ondrejkovic dismantled the most common shortcut. A client automates half of recruiting and concludes it can cut recruiters by 30%. But the company is growing, some recruiters are retiring, others leave through normal attrition. In three or four years, it may need more recruiters, not fewer. Another client automated customer service, cut 30% of the team, saw the implementation underperform and the remaining staff leave, and had to rehire. Her advice: scenario planning of the talent footprint, with a plan for the case where AI works as expected and one for the case where it does not.

Here is where it lands on our desks. The real estate leaders on stage admitted they cannot size for it yet. In the expert panel, Véronique Neiss (Head of Real Estate and Facilities, Bank for International Settlements) described a new tower in front of Basel's main station, the BIS's first project of this scale in more than 60 years, now in design phase. She listed the open questions honestly.

> *“What is the impact of AI agents in terms of capacity? We don’t know yet. Our figure crunching is still quite standard. But it’s a burning question, and we need to find answers before we start the execution of the work.”*
>
> Véronique Neiss · Head of Real Estate and Facilities, Bank for International Settlements

Alex Wilkins (Global Lead, Real Estate Transactions, Roche) put the gap in one sentence: real estate teams are “pretty good at managing the boxes”. They can forecast offices, keep capex minimal and stay agile in fit-out. What they cannot read is what AI means for the business itself, which products, which investments, and therefore which kind of real estate.

POINT OF TENSION · THE DENOMINATOR PROBLEM

Every space standard in Europe divides something by headcount: m² per person, desk-sharing ratios, meeting rooms per 100 employees. Microsoft’s own example says growth can now happen without hiring. BCG says time saved does not translate into fewer people for years. The BIS is pouring concrete for decades without an answer. The tension is unresolved, and it should change how portfolios are planned: fewer fixed commitments indexed on headcount, more scenarios, more convertible space.

Our reading: “token capital” is a sales frame, and we treat it as one. But it names something real for corporate real estate. For 30 years, the business case of every workplace project started with a headcount forecast. If revenue and headcount decouple, the workplace function needs another anchor. The candidates on stage were activity, perception and value (see 1.4). None of them fits in a spreadsheet as neatly as headcount. Which is exactly why the first teams to build them will own the conversation with the CFO.

ACTIONABLE · ADD AN “AGENT SCENARIO” TO YOUR NEXT PORTFOLIO REVIEW

Model three cases for each major site over five years: headcount-led growth, flat headcount with higher activity, and contraction. For each, test what changes in m², meeting rooms and collaboration space. Favour decisions that survive all three: shorter commitments, convertible floors, furniture you can move.

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When business needs keep changing, the workplace needs to adapt with them. Sedus designs furniture and workplace solutions for ergonomics, flexibility and long-term use, supporting spaces as they evolve.

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PART 1 · TREND 03

1.3 Rush hour: the office is back, and now it is full

03

For five years, our industry's problem was the empty office. In Zurich, one speaker after another described the opposite: the full one.

The data. Roger Meier (Founder and CEO, ROOMZ) had five minutes before lunch, and used them to put one slide on the screen, quoting CBRE's 2026 Global Workplace and Occupancy Insights.

AVERAGE UTILISATION

53%

Global average building utilisation (from 35% in 2023 and 38% in 2024), the highest since 2020

PEAK UTILISATION

80%

Average peak utilisation in 2025, 15 points above the 65% target

OCCUPANCY

111%

Seats allocated against seats available in 2024 (from 101%): more staff than desks

68% of employees say they come in primarily to collaborate. Source: CBRE, 2026 Global Workplace and Occupancy Insights, as presented by Roger Meier, ROOMZ.

His diagnosis was simple. People come back on the same days, Tuesday to Thursday. Meeting rooms and desks fill up at peak hours. Open-plan desks double as call booths, and remote-call chatter breaks everyone's focus. "The result: crowded corridors and noisy floors, even while many rooms sit empty most of the day." ROOMZ is a vendor of room displays and sensors, and the slide served the pitch. But the pattern was confirmed independently all day.

Every building told the same story. At The Circle, the Microsoft host explained that catching a desk had become harder since people started coming back voluntarily. At Lombard Odier's new Geneva headquarters, the bank dedicated two collaborative spaces of about 1,000 m² each, with lake and mountain views, and feared nobody would dare use them. "After two days, it was already full," said Nicolas Rogemond (Executive Vice President, Head Buildings and Facility Management, Lombard Odier). And at On Labs, where headcount in the building grew from about 200 to more than 1,300 in five years, the Workplace Experience team described the side effects of success it is now working through: meeting rooms as the most requested resource, "desk hoarders" who leave a laptop on a desk and spend the day in meetings, and "ghost bookings" that automatic room release will tackle next (see the Special focus below).

The audience felt it too. In the first Slido poll, attendees said their workplace strategy is designed first to optimise employee experience, followed by cost efficiency and real estate optimisation. Later in the day, asked which workplace tension is hardest to get right, the room gave a clear winner: collaboration versus focus. That is the whole rush hour problem. Everyone comes in to collaborate, on the same three days, then needs a quiet corner for the call.

POINT OF TENSION · COLLABORATION BRINGS PEOPLE IN. CALLS PUSH THEM OUT.

68% come in to collaborate, according to CBRE. But a hybrid workforce spends much of its office time on video calls with people who stayed home. The more successful the return, the louder the floor, and the more the quiet spaces and meeting rooms are overbooked. Fix attendance without fixing call capacity and you have not removed the friction. You have moved it to the floor.

The rush hour toolkit that emerged. None of it requires a new building.

- **Turn existing rooms into instant spaces.** Meier's proposal: let anyone see that a meeting room is free and book it on the spot from the door panel, so meeting rooms work like huddle spaces for calls.

- **Release ghost bookings.** On's Workplace Experience team named it as its next step: a system that frees a room when nobody shows up. The team was clear that the cultural shift is the hard part: getting people used to being on time, or losing the room.
- **Discourage hoarding.** On encourages people to take their laptop with them when they leave a desk, and has just installed occupancy sensors to see how space is really used.
- **Make every square metre workable.** Lombard Odier's 2,000 m² of collaborative space, its 450-seat dining area used as a third collaboration space outside lunch hours, and its auditorium used for World Cup screenings show the logic: in a full building, no space can afford a single use.

Middle managers are still the brake. Rogemond's most telling detail was not about space. It took change management to convince "the more conservative middle managers" to let their teams use the collaborative areas. "The middle managers were saying that if their people are not at their desk, it means they're not working. They are working. It's just that they're working differently." Same people slowing AI adoption in 1.1. Same reflex.

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In a full office, every space has to be a place you can work

When peaks hit 80% and seats are allocated at 111%, the answer is not more desks. It is making the spaces you already have usable: meeting rooms between bookings, the café after lunch, the lounge, the terrace, the collaborative floor. In practice, what decides whether people work in those spaces is often mundane. Can I plug in? Is there a socket where I want to sit, and does it work? Did I bring my charger?

Across our 120+ client sites, we see the same pattern: spaces where people can power up without thinking are used, the others are avoided, and people fall back on the desk where their charger lives. Mobile, secured energy is one of the simplest ways to turn an overbooked office into a fully usable one, without works.

SPECIAL FOCUS · WORKPLACE TOUR

Inside On Labs.

The day before the conference, Worktech took a group of delegates, Sinem and me included, through On Labs, the Zurich headquarters of the running brand On. It is one of the most celebrated offices in Europe, and a live case study of a workplace that kept pace with hypergrowth thanks to its culture, and is now fine-tuning its operations. Here is the full anatomy: the story, the spaces, the services, and the work in progress.

ON LABS IN NUMBERS

2021
~200
Headcount in the building when the guide arrived

TODAY
1,300+
Headcount in Zurich (“thirteen hundred and something, and counting”)

END OF YEAR
1,500
Number expected by the end of the year

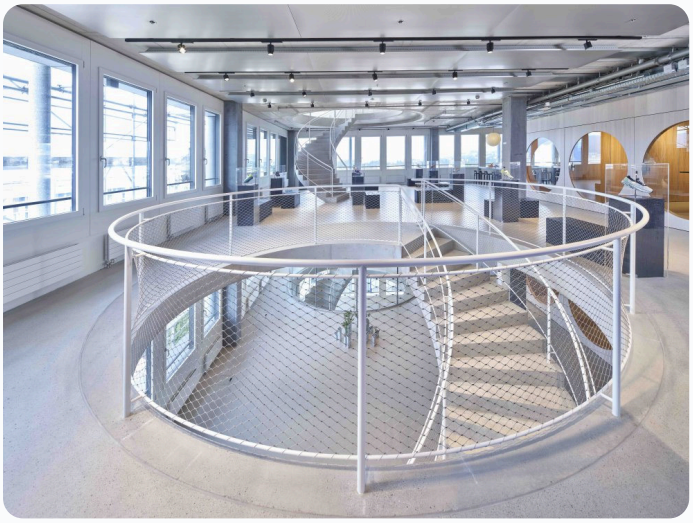
About 1,040 workstations, a desk-sharing ratio of roughly 1 to 1.2. Around 1,400 seats in total, including informal settings (guide’s estimate).

Source: On Workplace Experience team during the tour; workstation ratio from our on-site notes.

SPECIAL FOCUS · INSIDE ON LABS

The building

On Labs occupies a 17-storey tower on Förrlibuckstrasse in Zurich West. On rents the space, but the interior fit-out was designed for the company. It started with a few floors and grew until it took the whole tower. The last two levels, called “Oniverse”, had just been taken over at the time of the visit and were not yet operational. On shares the wider complex with neighbours including the architecture firm Monoplan, the chocolate maker Barry Callebaut and the tech company Scandit, connected by a bridge and a shared rooftop garden. In the annex next door, On produces LightSpray shoes in-house, with robots spraying the upper in a few minutes. Access is restricted.



On Labs · The Trail staircase



On Labs · The Blue Library

The story: a mountain trail in a tower

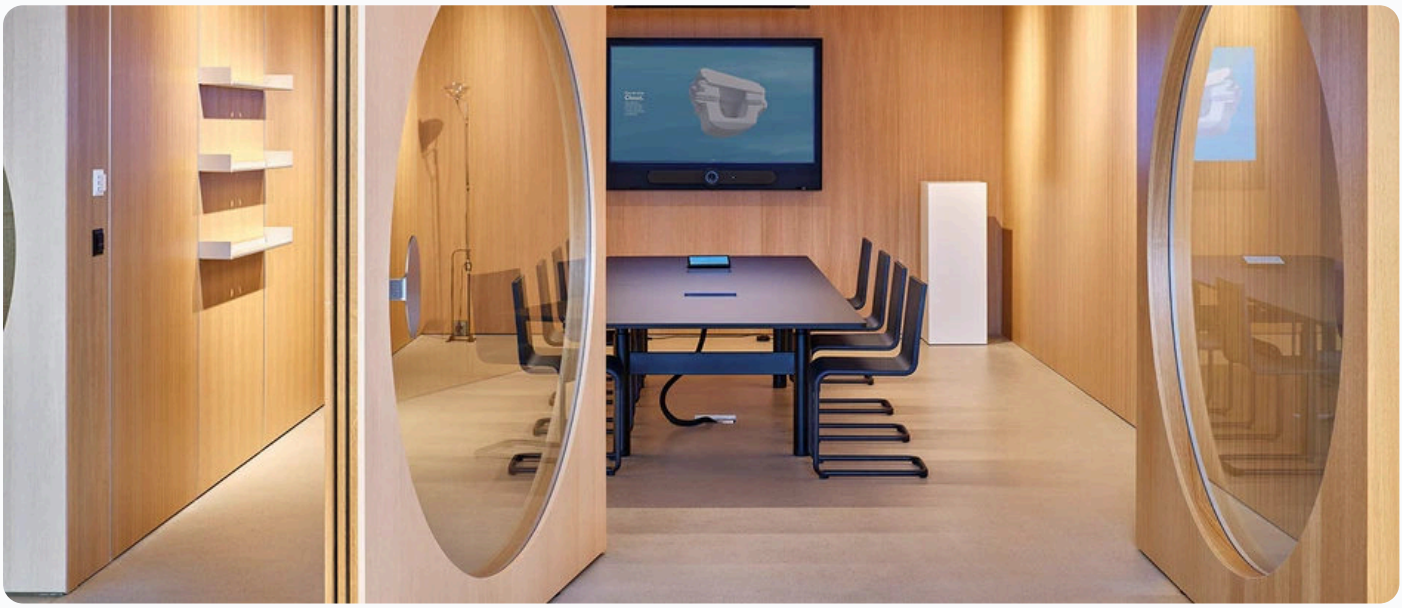
The concept recreates the origins of the brand in the Swiss Engadine mountains, where the founders came up with the idea in 2010. Everything in the nomenclature relates to nature and movement.

- **Neighbourhoods, or villages.** The tower is split into neighbourhoods named after landscapes (Earth, Forest, Lake, Mountain, Cloud). Each spans three floors, and each floor has a theme: a social floor, a focus floor and a collaboration floor. Each social floor has a Village Square with a kitchen at its centre. Each neighbourhood has its own colour palette: touches of blue in Lake, green in Forest.
- **The Trail.** An internal staircase connects the floors. It starts wide at the bottom and narrows as it climbs to the 17th floor, “the summit”, to simulate the climb along a trail. Small messages hide along the way (“Dream On” on some steps).
- **The gems.** Each village has a signature space. The Blue Library on the eighth floor, with over a thousand books, memorabilia and the New York Stock Exchange gavel, where the guide said Roger Federer announced his retirement. A natural tree preserved to last about twenty years without water. A Rock Room with stones from the Engadine. The Glass House, an “oxygen room” with around 200 plants and no screen, meant to help teams think outside the box. Hack Garages for workshops.
- **No private offices, even at the top.** The eighth floor hosts the C-suite and their teams, with meeting rooms and “Connect Rooms” (phone booths), but no individual offices.

The culture, designed in

- **Lockers that do not lock.** Sports lockers on each social floor, deliberately left open. “We thrive on a culture of trust.”

- **Movement as infrastructure.** A test-shoe wall sorted by size: take a pair, go for a run, bring them back. A laundry room open to all. A “mini spa” with showers. Weekly sports classes announced on screens. A Cyclon recycling point to give old On gear a second life.
- **Food as a meeting point.** Roots Café serves vegan food every day, with one free barista coffee per person per day.
- **Furniture as brand.** “All our furniture is from Vitra. Absolutely everything.” Co-founder David Allemann was previously Vitra’s marketing chief.
- **Colour with intent.** The Customer Success area uses a colour the guide said is meant “to psychologically raise the level of happiness”.
- **A guest floor.** The third floor welcomes external visitors, with rooms equipped with switchable privacy glass that turns opaque at the press of a button.
- **A rooftop that is deliberately wild.** Herbs, fig trees, a garden left wild on purpose (“pretty imperfect”, as one visitor put it), used for parties. The guide admitted the residential neighbours “are not big fans”, and that the music stops at 9 p.m.



On Labs · Meeting rooms

The event engine

The Earth Lobby hosts up to 180 to 200 people. The team managed 469 event tickets last year for the one space it runs, and declines as many external requests as possible because internal demand is so high. Renting the space costs 8k for a day, according to the guide. This office is not only a workplace. It is a brand venue, and it is booked like one.

FIELD CASE

“Every office has its own story”

On keeps consistency across its offices without copying them. The neighbourhood concept is unique to On Labs because it tells the brand’s origin story. In London, the guide described clay built into the walls, so the office “feels earthy”. One delegate summed it up with the line his own organisation uses: “Make a place worth the commute.”

From keeping up to fine-tuning

On Labs was designed when On was a fraction of its current size. Since then, headcount in the building has grown roughly six- to sevenfold. The Workplace Experience team's first priority was to keep up with that growth, and the culture and people experience built into the office absorbed the pressure: people want to be there. The team is now in the next phase, removing the remaining irritants to deliver the best office experience possible. It was open about where that work stands.

- **Hot desking at peak.** Desks are unassigned. Peaks fall on Tuesday, Wednesday and Thursday. Some employees leave their laptop on a desk and spend the day in meetings, so the team encourages everyone to take their laptop along and keep spaces available.
- **Meeting rooms are the most requested resource.** They top the list of requests, a classic sign of an office people use intensively.
- **Room release is next.** Rooms are not yet released automatically when nobody shows up. The team plans to fix it, knowing the hard part is cultural: getting people used to losing their room if they are late.
- **Sensors are in.** Occupancy sensors were installed recently, to understand utilisation and optimise the space.
- **Ergonomic choice is growing.** Height-adjustable desks are available in dedicated areas, on request, and are "one of the most requested things". The floors also offer screened focus workstations, the modern version of the cubicle.
- **Noise is not a complaint.** People are "aware and quite mindful", according to the guide.

> *"We're not a technology company, so we're catching up and getting everything up to standard. From a design point of view, as you can see, it feels like a museum. Now it's our job, as the new team, to bring in all the resources."*
>
> On Labs guide · Workplace Experience team

The quote needs its context. "Museum" was praise for the design, not a criticism. The story, the materials and the culture were built in from day one, and they are what carried the office through growth. The booking rules, sensors and ergonomic options are now being added at the scale of 1,300+ people. Most fast-growing companies go through this in that order. On is doing it in the open, which is what made the visit worth it.

What to copy, and what to anticipate

1. **Tell one story with the whole building.** Villages, trail, gems and colours make wayfinding intuitive and culture visible. The narrative does the onboarding.
2. **Put the social floor first in every neighbourhood.** A kitchen at the centre, three floors per community, a staircase that makes movement the default.
3. **Design trust into the furniture.** Unlocked lockers say more about the culture than any values poster.
4. **Turn movement and food into services.** Test shoes, laundry, showers, a daily free coffee. Small, cheap, used every day.
5. **Decide the rules of the building while you design it.** Room release, occupancy sensing, desk etiquette and ergonomic options are cheaper to build in than to add at 1,300 people.
6. **Size for success.** If your office works, people will come on the same three days. Decide in advance how you will manage the peak.

PART 1 · TREND 04

1.4 Less data, better questions

04

The expert panel was billed as "Scaling Workplace Intelligence: From Fragmented Signals to Strategic Decisions". It turned into a session about how little of that data you actually need.

The data pond. Moderator Philip Tidd (Managing Director and Principal, Gensler) brought together three heads of large portfolios. Alex Wilkins described Roche's FP Score, a programme that has measured occupancy cost, space efficiency, water, waste and user perception consistently for more than ten years, across hundreds of offices worldwide. Peter Baumann (Global Head of Strategy and Planning, Global Real Estate and Facilities, SAP) described SAP's four layers of workplace data: value (portfolio, leases, buildings), business (growth, talent, capacity), spaces (m², technology, utilisation) and people, "a hundred thousand people in the spaces, and their emotions". Then he punctured the industry's favourite word.

> *"A lot of people speak of a data lake. At this point I feel it's more like a pond: a lot of data, very random. You look into it and you realise you can circle this conversation endlessly."*
>
> Peter Baumann · Global Head of Strategy and Planning, SAP

SAP's answer was a framework that checks the quality of each data source (how resilient, how harmonised) to decide which data can be compared across the whole portfolio, and which only makes sense locally.

KEY CONCEPT

From 50 questions to 2 (SAP)

SAP kept its large surveys. But at global level, it now focuses on two questions only: how people feel about the space, and whether they perceive that the space makes them more productive. Local teams can still go deeper. The portfolio is steered on two numbers that every executive understands.

Tidd picked up the second question: productivity is said to be hard to measure, but "it's not hard to measure if people feel more productive". And he went further than most consultants would on stage: "This industry is being a little too obsessed about data."

Start with values, not with data. Wilkins insisted on the order of operations. Before deciding what to do with data, an organisation needs a decision-making framework: what is a good portfolio, and what is it for? Ten years ago, Roche steered on efficiency, effectiveness and sustainability. Around COVID, it added a fourth criterion: inspiration. "More than just creating effective workspaces, we want them to inspire our employees." Targets are set on consistent data and embedded in the approval process, so the team can prioritise the projects that add most value.

> *"Data is the new oil. We've all got loads of oil. What do we do with all this oil?"*
>
> Alex Wilkins · Global Lead, Real Estate Transactions, Roche

The change dip is real, and it passes. The most useful exchange of the panel was about post-occupancy. Baumann's two rules: "Be patient. And secondly, quantify feedback." Change comes with a drop in satisfaction. React too early and you undo the change to stop the complaints. Too often in global corporations, a complaint escalates to the CEO and comes back down as an order to fix something. Quantified feedback tells a different story, and gives the team a stronger hand. Roche measures user perception after every project that follows its workplace strategy protocol. The numbers say the fear is wrong.

+12%

Perception after the project

Average improvement in Roche's user perception index after workplace projects that follow its change protocol, usually alongside a gain in space efficiency. Moving people from enclosed offices to open environments does not lower perception when change is managed well.

Source: Alex Wilkins, Roche

FIELD CASE

The corridor of no

Before COVID, the UN in Geneva decided to move a new building to activity-based working. Staff back from humanitarian missions found shared desks instead of their offices. The unions put posters along the corridors against hot desking. Philip Tidd, who worked on the project, remembers being introduced at a Worktech in Geneva as "the most hated man in Geneva", and calls it "the corridor of no": about a hundred metres of posters. Véronique Neiss, who was there, recently asked how the most reluctant teams were doing after a temporary move back to the heritage building with more individual offices. They did not want to stay. "It's also a question of time," she said. Tidd added the other half of the lesson: organisations are not frozen. A few years later, US funding cuts became a far bigger topic for the staff than desks.

Perception beats perfection. The panel's best lines were about why satisfaction is fragile. Wilkins: "The minimum standard of facilities management is total perfection." When everything works, nobody notices. Baumann told the story of a gourmet chef who said he can cook the perfect meal by every standard, "if the guest doesn't like it, I failed my job". His conclusion: "If the people don't like it, we failed our job."

The same lesson from the other sessions. Elvis Pidic (Head Group Architecture and Real Estate Management, Bühler Group) said his team did not run extensive surveys before transforming Bühler's campus. It ran interviews, observed, analysed and decided, and after moving in, it asks users not to change the space for the first three to six months, then holds a workshop and adapts. At Lombard Odier, Fanny Fayol (Smart Building Manager) showed what a strong data foundation looks like: a BIM-based digital twin, a building operating system and 250,000 data points in one building. With that foundation in place, the bank is taking the step every data-rich organisation faces: choosing the KPIs that link the data to business outcomes. Data does not answer the question by itself. It makes the question worth asking.

POINT OF TENSION · 250,000 DATA POINTS OR TWO QUESTIONS?

Lombard Odier has built a data foundation most organisations do not have yet, and is now choosing the KPIs that will make it speak. SAP steers a global portfolio on two perception questions. Bühler did interviews. The panel's moderator says the industry is "too obsessed about data". The real split is not data versus no data. It is collecting versus deciding. Value sits in the question you pick, not the volume you store.

Data is not a seat at the table. Value is. Baumann's closing remark deserves a frame on the wall of every real estate team. Real estate teams are "the how" of the business strategy. If the conversation with the business starts with data, it ends with a negotiation about workstations. If it starts with business value, the team gets invited.

"If we start the conversation with data, the negotiation will be about workstations. If we translate our data into business value, suddenly you receive a seat at the table. Not by process, but by invitation."

Peter Baumann · Global Head of Strategy and Planning, SAP

ACTIONABLE · BUILD YOUR TWO-QUESTION INDEX

Add two questions to every post-occupancy and pulse survey: "How do you feel about this space?" and "Does this space make you more productive?" Track them by site over time. Do not read them before three to six months after a move. Present them to the executive committee next to cost per seat, not instead of it.

sedus

Data can tell us how a space is used. People tell us how it feels.

Spaces That Care explores how workplace design can support focus, recovery, connection and changing human needs. Discover Spaces That Care with Sedus.

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PART 1 · TREND 05

1.5 Built for change

05

If AI makes the future of the business harder to read (1.2), the building has to absorb that uncertainty. The most personal talk of the day showed what that looks like in practice.

A brief that changed every two weeks. Stephan Hürlemann (Architect and Designer) trained at ETH, where architects are "drilled to figure out the best design, a timeless design". He designed offices and products meant to stay exactly as drawn. Then came a project for PwC's Experience Center. The brief started with about 45 workplaces, three meeting rooms, offices, focus rooms, booths and workshop zones. Two weeks in, the project manager called: an acquisition, now 60 people. Two weeks later, another call: could the same floor take more people? The number ended up around 120.

> *"Vanya is not a stupid guy. And this was not a problem of Vanya. This is a general problem."*
>
> Stephan Hürlemann · Architect and Designer

That was 2015, before AI was on anyone's agenda. His answer was to change the method. Build as little as possible and as much as needed. Blur the lines between space types. And use furniture a team can move on the spot, instead of systems that take four or five months and a procurement cycle to reconfigure. He called it the "dancing office", with work as a choreography, sometimes dynamic, sometimes quiet. One of the solutions developed from that project was the Dancing Wall, later launched by Vitra in 2018. Hürlemann also tested the concept in his own studio, including its acoustic limits.

He used his own early work as a warning. For a Zurich law firm, he once designed a massive rock as the reception desk, a strong brand signature but almost impossible to move. "It's probably easier to move the building than the entry desk. I doubt that I would do it again."

From flexible furniture to flexible architecture. The next step was micro-architecture. With Erich Keller, Hürlemann developed Talky, a system combining acoustic rooms, service points, shelves, whiteboards and mobile partition elements. One detail illustrated a broader design challenge particularly well: how to add flexibility without creating further dependence on the ceiling.

> *"It's often difficult, because the ceiling is already taken by acoustics, light and air. Now we have the corner points of these objects in the space, and we can just connect them. How cool is that? We don't have to go to the ceiling anymore."*
>
> Stephan Hürlemann · Architect and Designer

The economics. In a classic fit-out, a tenant builds out an empty floor, then adds loose furniture. Every change is slow, costly and generates waste, and at the end of the lease the tenant may need to restore the space. In a more reversible model, part of the fit-out is shifted towards elements that can be moved, reused, sold or taken to another site. Hürlemann said that in his comparison, the flexible version came out cheaper. But his broader point was about retained value: even at equal cost, elements that can be moved, reused or resold remain assets rather than becoming waste.

FIELD CASE

28 kg of steel per partition

After the climate movement made him question the impact of his work, Hürlemann reduced his studio, stopped flying unless necessary and focused more closely on material use and product longevity. In the second generation of the Dancing Wall, the amount of steel was reduced by 28 kg per unit. His point was less about the product itself than about the cumulative impact of design decisions when a product is manufactured at scale.

The CFO has a stake. The most interesting question came from Peter Baumann (SAP): could this kind of fit-out be leased? "If I talk to a CFO today, cash flow is an absolute priority, and I could substantially improve my cash flow by doing these concepts." Hürlemann agreed: "Leasing or renting objects. This is the future." The discussion widened from design to business models. Leasing, rental, reuse and take-back models all challenge the traditional logic of selling a product once and disconnecting from it. They also reinforce the same idea: flexibility has a financial dimension as well as a spatial one.

The same logic at campus scale. Bühler Group chose to transform its historic founding site in Uzwil, where the company started in 1860, as a brownfield project rather than start again. The family owners took a clear line on the past: "We don't care about the past. We want to look at the future." Pidic's team kept flexibility in the buildings so they can change them "if needed". At the BIS, Neiss described how the team regularly "re-baselines" the project, re-questioning objectives and key drivers, going back to the board with an update on key decisions, and keeping room in the design for answers that do not exist yet.

The workshop brought adaptability into a broader value framework. Before the exercise, Key Kawamura (Co-Founder, Studio Banana) and Susannah Burock (Founder, Susannah Burock Consulting), who ran the two afternoon workshop rooms, introduced a Value Equation built around six dimensions that can make a workplace valuable. Our table, where Sinem and I were sitting, worked on one of them: Future Value. The discussion kept returning to the same challenge: we do not know what work will look like in five years, so the ability of a workplace to adapt becomes part of its long-term value. I pointed out that buildings that remain useful for generations often do so because they can accommodate changing uses, while others become obsolete much faster. Another participant warned that "flexibility" has become a word everybody uses without defining it. Where I landed: if adaptability contributes to Future Value, we should be able to define and measure it.

Fixed shell, mobile everything else

Keep the base building as neutral as possible. Put more of the identity, acoustics and functions into elements that can move, be reconfigured, reused or leave with the tenant. Measure a workplace by how easily and economically it can respond to change, not only by how perfectly it matches today's brief.

osol. | OSOL INSIGHT

The ceiling is free. What about the floor?

Micro-architecture and movable furniture can remove many of the constraints that make offices difficult to reconfigure. But there is a second fixed plane in every office: the floor, with its boxes, trunking and sockets. Power is the last layer that pins furniture to a spot. Move a table, add a room, turn a lounge into a project space, and you hit the same wall: where are the sockets?

This is the problem Osol was built to remove. A fleet of secured smart batteries, the Pico, takes power wherever the furniture goes, with no floor boxes, no electrician and no works. And because we run it as hardware-as-a-service, it answers Peter Baumann's CFO question too: a flexible layer that does not lock up capital. If the shell is fixed and everything else moves, the energy has to move with it.

PART 1 · TREND 06

1.6 Mode is not mood

06

Workplace design has spent ten years building "modes": focus rooms, phone booths, work cafés, lounges. Three sessions in Zurich said the same thing: a mode is not enough. Nobody changes behaviour because a couch exists. They change because of how the space makes them feel.

Sound is the underused design tool. Malou von Gleichenstein (Co-Founder, SOA Soundarchitecture) comes from healthcare, and brought a human-centred lens to the afternoon. Her starting point: people move around an office for social reasons (where the team sits, who they want to talk to, where the window is) or because something disturbs them. Not because of the furniture label on the plan.

> *"People don't get in the mood just because there is a couch."*
>
> Malou von Gleichenstein · Co-Founder, SOA Soundarchitecture

Her case for sound: it is faster than vision (she cited two to four times faster than visual input), deeper, wider (it travels through the whole room) and dynamic (it changes over the day). Libraries, churches and clubs all tell us how to behave through their soundscape. Most offices tell us nothing. She played the room's own ambient sound to make the point: ventilation and devices. Walk an office blind, she said, and you could not tell which zone you are in. On the sound level, she said, most offices are "uncontrolled and uncared for".

WILLINGNESS TO TALK

+74%

Effect of designed soundscapes presented by SOA Soundarchitecture

SOCIAL INTERACTIONS

+22%

Alongside +30% reported overall well-being and +25% motivation

LONGER CONVERSATIONS

+30%

And +60% mental presence. Figures said to come from scientific sources, many from hospitality research. Sources were not shown on the slide.

Source: SOA Soundarchitecture slide, Worktech Zurich 2026.

Sound architecture, not acoustics. SOA's method starts with sound mapping of the floor plan, using the zone logic of the WELL Building Standard: lively, quiet, mixed, circulation and transit zones. In a project for a German auditing firm, the team designed music for a sky lounge whose problem was that it was always too loud or too quiet, depending on who was there, which led to more social interaction and longer dwell times. In the open-plan office, the answer was a designed silence, because silence is a learned behaviour: if nothing tells people a zone is quiet, they will do everything everywhere. In the lobby, a nature soundscape for the waiting area and music for the café and reception added privacy and made the space feel occupied, which mattered to people working late. All of it runs on a "sound calendar" that evolves by the hour, the day and the season.

The client's internal evaluation surprised even her team. On something as banal as the office coffee, opinions usually split fifty-fifty. On the soundscapes, disapproval fell to 3%.

> *"When you don't design how the room speaks, it will just find its own language."*
>
> Malou von Gleichenstein · Co-Founder, SOA Soundarchitecture

Diversity is the design brief. Susannah Burock, chairing the session and a WELL AP, asked about neurodivergent people. The answer was direct. For someone with ADHD, "silence is their death", they need something going on. For others, any trigger breaks focus. The only answer is a range of sound environments and the freedom to move between them. Sinem Beaujean (Global Engagement Strategist, Sedus) made the same case for inclusion more broadly. Sedus, owned by two charitable foundations, ran an "Inclusive Journey" at its headquarters with clients and partners, followed by the "Inclusive BoosterCamp" bringing together about 20 people at Philips' headquarters in Amsterdam, to make tangible how differently people experience the same space and how much cognitive fatigue it creates. Her link to the morning panel: data matters, but so does the emotional experience of the people using the space.

The brain filters almost everything. Nina Indina's neuroscience (1.1) gives the theory behind both talks. If only a tiny fraction of the millions of bits of sensory information we receive every second reaches conscious awareness, the environment shapes behaviour mostly below the level of conscious choice. Sound, light and atmosphere work on that layer. Signage and policies do not.

A weak signal from our table: the office that talks back. In the afternoon workshop, I shared a conversation with someone in an IT department at Bosch whose team increasingly uses AI dictation tools such as Wispr Flow. They no longer type. They talk to their laptops. Now imagine half of a floor dictating to AI all day. The open plan was designed around keyboards. Voice-first AI could turn sound from a comfort topic into an infrastructure topic, and the speech privacy, zoning and soundscape thinking Malou described would move from "nice to have" to a prerequisite.

POINT OF TENSION · DESIGNED ATMOSPHERE OR DESIGNED MANIPULATION?

Music that lengthens conversations, colours meant "to psychologically raise the level of happiness" (On's Customer Success area), soundscapes that make a space feel occupied. These tools work because they act below conscious choice. That is their power, and the reason to use them transparently. The 3% disapproval at the auditing firm suggests people welcome atmosphere when it serves them. The test is simple: would employees still approve if they knew exactly how it works?

ACTIONABLE · DO A BLIND WALK OF YOUR OFFICE

Walk your floors with your eyes closed, or record ten minutes of sound in each zone. If the café, the open plan and the quiet area sound the same, 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 every day.

sedus | SEDUS INSIGHT

Choice is the first inclusion tool

Malou's soundscapes and Nina's point about how little sensory information reaches conscious awareness both lead to the same question: what happens when the same environment is experienced very differently from one person to another?

That was also the starting point of Sedus' Inclusive Journey and Inclusive BoosterCamp. During the event, the Mindful Office booth experience invited participants to explore this for themselves. Some people need more stimulation, others less. Some need privacy, others connection. Some recover through quiet, others through activity.

The answer is not one perfect setting. It is choice. One workplace can support very different needs when people are given enough variety, control and freedom to find the conditions that work for them.

Sinem Beaujean · Global Engagement Strategist, Sedus

PART 1 · TREND 07

1.7 People first, technology in service

07

An industrial campus in eastern Switzerland and a bank headquarters on Lake Geneva have almost nothing in common. Both started with the same priority: give people a reason to be together. Then they built technology to serve that goal, and in Lombard Odier's case, some of the most advanced building technology presented on the day.

Bühler started with the canteen. Bühler Group makes the machines and plants behind everyday products: breakfast cereals, bread, beer, coffee, chocolate. Its customers include Nestlé, Barilla and BMW. According to Elvis Pidic, two out of three chocolate brands and almost every second car rely on its equipment. The company has 13,000 employees in 140 countries, about 3 billion in turnover, and reinvests 5% of turnover in innovation every year. It is still family-owned after 166 years, now by three sisters, and has had seven CEOs in its history. That long horizon allowed a ten-year transformation of its historic site in Uzwil, about 40 minutes from Zurich, which is "definitely not the centre of the world".

CHF 120m+
over 10 years

Bühler's brownfield renewal of Uzwil
Bühler's investment to renew most of its Uzwil site as a brownfield project: R&D centres, a new innovation hub, an education building, state-of-the-art manufacturing. The brief from the owners had five elements: an innovation hub, modern manufacturing, workplace quality to attract graduates from ETH, EPFL and universities, space efficiency and decarbonisation.

Source: Elvis Pidic, Bühler Group

The first project was the staff restaurant, in a building just over a hundred years old, one of the first canteens in Switzerland. The reason was symbolic: show everyone that a new start had come and that manufacturing in Switzerland had a future, through the one place everybody uses. "And the secret was obviously we are a food company. Where should we start else?" Then came the R&D halls, where customers test machines and recipes. Then "the Cubic", an innovation centre of about 5,000 m² connected directly to the R&D halls and the engineers' towers, because before, engineers had to cross an outdoor area, and "humans tend not to walk if it's raining outside". At its heart sits the barista, where most interactions happen, "maybe also just because our baristas are not the quickest ones". Then the Energy Center for education: home to about 400 apprentices, open to adults who retrain, and including a "Health Port" with lifestyle check-ups, mental coaching, yoga, physiotherapy and massage. An internal walkway lets employees and customers move through the site without safety shoes while seeing inside the application and R&D centres.

> *"I can do focused work in Starbucks, on the airplane, wherever. But the reason to go to the office is to meet people. The reason for coming back was not the sit-stand desk. The reason for coming back was the collaboration with colleagues."*
>
> Elvis Pidic · Head Group Architecture and Real Estate Management, Bühler Group

Two of Pidic's choices deserve attention. Bühler did not run architectural competitions. It built an internal team of 10 to 15 architects, interior designers, construction and facility managers, with direct access to the family, the CEO and the CFO on culture and strategy, and to employees on needs. And Pidic knows the limits of his job: "We can be an enabler. We can build a platform. But what we cannot do is directly influence culture." The next step needs HR and leadership. An attendee who had visited the site praised what struck her most: office workers and factory workers treated as equals in the same campus.

Lombard Odier bet 2,000 m² of lake view on collaboration. 1Roof, the bank's new headquarters in Bellevue near Geneva, is 170 metres long, about 68,000 m² including underground levels, with more than 2,000 desks and around 200 meeting rooms around a central atrium. Nicolas Rogemond walked us through what makes people come.

FIELD CASE

1Roof, Lombard Odier: what makes people come

- **Two collaborative spaces of about 1,000 m² each**, with the best views of the lake and the mountains. Full after two days, once middle managers accepted that people away from their desk are still working.
- **One video conference experience everywhere.** The same Microsoft Teams set-up in every meeting room, so "if you did proper things before, you just click on join". IT support requests dropped sharply.
- **Dining for 450**, used as a third collaborative space outside lunch hours, in a location with fewer restaurants around.
- **A fitness centre with more than 450 annual subscribers**, with no subsidy from the bank, and 42 showers to support cycling to work.
- **Sport on the big screen.** Two Swiss World Cup matches broadcast in the 500-seat auditorium, one at 5:30 a.m., one at 10 p.m. With sausages or croissants. Engagement without a strategy deck.
- **Sustainability as proof.** BREEAM Outstanding, SNBS Platinum and Minergie. Heating and cooling by Lake Geneva water. A 400 m³ rainwater tank for toilets and gardens. 70% of staff commute by soft mobility. Solar panels covering about 10% of electricity needs at peak.

Source: Nicolas Rogemond, Lombard Odier

> *"When we speak about user engagement, we start creating super complicated strategies. Sometimes you just bring people together around a sports event, offer some sausages or croissants for breakfast, and it works perfectly."*
>
> Nicolas Rogemond · Executive Vice President, Head Buildings and Facility Management, Lombard Odier

Then the smart layer, one of the most advanced of the day. Fanny Fayol (Smart Building Manager, Lombard Odier) opened the hood. 1Roof was designed as a smart building from the start, with a technology programme running in parallel to construction and a BIM model that now serves as a digital twin. The bank operates 25 solutions, chosen best-of-breed rather than from one platform, with three goals: a better experience for employees and clients, efficient operations teams, and tools for supervisors to understand and improve the building. A building operating system (Spinalcom) acts as the integration layer and common data model between hospitality, maintenance (CAFM and ticketing), the building management system and security. Her early lessons are among the most useful of the day for anyone planning a smart building.

KEY CONCEPT

Five early lessons from operating a smart building (Lombard Odier)

1. **Best-of-breed has a price.** 25 solutions reduce vendor dependence but create integration and integration-maintenance work.
2. **Build a dedicated smart building team, separate from IT.** Skills in data, BIM and building technology. Separate, because IT is driven by business priorities, and the smart building needs its own.
3. **Plan the BIM handover.** Construction delivers many detailed BIM models. Operations needs a few simple ones, with only the information operators use, easy to update.
4. **Data must be trusted and analysed.** 250,000 data points and millions of values a day are worthless until linked to business outcomes. Defining the KPIs is the current challenge.
5. **Adoption is a workstream.** All 25 tools were new with the building. Showing their value, and feeding user feedback back into the toolset, is still ongoing.

Rogemond's three takeaways summarise the session. You no longer have to choose between sustainability and beauty. Involve operations teams as early as possible in construction, because the handover is where success is decided. And "we don't do a smart building just for technological gadgets": the only justification is a better user experience. Even the rainwater toilets needed change management. The water is sometimes greyish. The team explained why, and the greyish water became something staff proudly show their families. The sensors confirm nobody flushes twice.

People come for people. At our workshop table, I shared what a panel of real estate directors told me the week before. Their executive committees ask them to "make people come back". Their answer: that is not the workplace's job. People come in for the people they want to work with. The workplace's job is to remove everything that makes coming in a pain.

Booking.com's real estate team measured it, as their global real estate director shared: the first reason to come in is to meet at least three favourite colleagues, by far ahead of any other factor, ten times more important than the second by his account. It matches the 3-to-5 colleagues threshold Daaf Serné presented in Rotterdam. Sinem gave the remote worker's version at the same table: she works fully remote and goes to the Sedus headquarters for one reason, to feel the culture, and to reconnect with what she calls her "Workplace Besties", the people and places that make the office worth the trip. She explored the idea further in a Workplace Besties podcast on YouTube. Bühler's barista and Lombard Odier's lake-view floors work because they serve that same need.

On and The Circle complete the picture. On Labs puts the social floor at the heart of every neighbourhood, with Village Squares, Roots Café and a daily free coffee, while its Workplace Experience team now rolls out sensors and booking improvements to match its growth (Special focus). At The Circle, the host summarised Microsoft's space as offering "a lot of space for focus, work and collaboration" without "fancy gadgets or slides from one floor to the other", and people come back voluntarily.

POINT OF TENSION · SEPARATE THE SMART BUILDING TEAM FROM IT, OR MERGE EVERYTHING?

In Rotterdam, every winning case ran on the convergence of IT, facilities and HR. In Geneva, Lombard Odier deliberately separated its smart building team from IT to protect its own priorities. Both can be right. Convergence matters for governance and the employee journey. Separation can matter for execution, when IT's backlog is set by the business. The question to settle early is who owns the building's data and its roadmap.

FIELD NOTE · NOVU CAMPUS

Beyond the office, a place to belong.

The day ended a few minutes from Microsoft, at Novu Campus, where drinks came with another workplace tour. Opened in 2025, the campus spans more than 4,000 m² across three floors, with around 300 workstations alongside meeting, event, co-working, focus and community spaces.



Novu Campus · Community area and coffee bar



Novu Campus · Sleep cabins

What stood out was not one spectacular feature, but the range. A coffee bar and community areas sit alongside quiet work settings, workshop rooms, an immersion room and even sleep cabins. The idea is less to prescribe how people should work than to give them different environments to choose from.

That was deliberate. Kristýna Pugel, Interior Designer and Workplace Consultant at Novu Office, designed the campus to evolve with its users, with flexibility, openness and identity as guiding principles. Modular furniture, adaptable settings, reused building elements and second-life furniture allow the space to change rather than stay fixed.

There was an obvious connection with a theme that had run through the whole day: one workplace does not have to mean one experience. At Novu, different moods, tasks and needs coexist within the same campus.

SURFACE

4,000+ m²

A workplace, co-working and community campus at Zurich Airport

FLOORS

3

Around 300 workstations alongside meeting, event, focus and community spaces

EVENT CAPACITY

240

People, for the campus event spaces

TRANSPARENCY NOTE

Sedus is one of the furnishing partners of Novu Campus. Sinem met Kristýna Pugel during the visit. Sedus has also published an interview with her about the design approach and the development of the campus. → Read the interview on the Sedus WHAT'S UP blog

DATA BREAK · LIVE POLLS

83%

chose human value

30%

chose financial value

Asked which dimensions will define workplace value over the next decade, 83% of Worktech Zurich 2026 delegates chose human value. 30% chose financial value.

Earlier the same day, the same room named measuring and improving the ROI of workplace investment as the biggest gap in their strategy.

Source: live Slido polls, Worktech Zurich 2026 (54 respondents for the value question)

PART 2

Cross-session perspectives.

What you see when you lay the 13 sessions, the polls and the tours on top of each other: convergences, contradictions and signals that only appear when every voice of the day is superimposed.

PART 2 · CROSS-SESSION PERSPECTIVES

The ROI paradox

The room told us two things that do not fit together. In the opening pulse survey, delegates named measuring and improving the ROI of workplace investment as the biggest gap in their strategy, by a wide margin. Their biggest barrier to a more intelligent workplace was slow decision-making and governance, followed by difficulty proving value to leadership. Then, in the afternoon workshop, 83% said human value will define the workplace over the next decade, 67% chose business value, 46% environmental value, and only 30% financial value. Future value came last at 28%.

The audience is not contradicting itself. It is describing the structural problem of our profession. Workplace leaders believe the value is human. Their executives ask for financial proof. And the tools to translate one into the other do not exist yet.

AI is caught in the same trap. Mark Jenkins described SIX's first attempt to justify Copilot: about half an hour saved per day for an integrated user, worth five to six thousand per user per year on paper, and impossible to aggregate into savings that pay for the licences. SIX stopped trying. It changed the argument to enablement, user by user, and adoption grew. Nina Indina's data shows the same gap at market level: 80% of users report individual productivity gains, 6% of companies see an impact on EBIT.

The panel offered the most useful way out. Peter Baumann's point is that the workplace team's contribution is scattered across other people's budgets: a bit of finance, a bit of marketing, a bit of HR. Summed up and told as one story, it becomes a business case. Roche shows the other half: consistent data over ten years, targets embedded in approvals, and a perception index that rises 12% after each project. Our conclusion: nobody will prove the ROI of the workplace with one number. It takes a few consistent indicators, tracked long enough to show a trend, and translated into the language of the people who sign the cheques. The 23% of executives with no workplace productivity KPI, found by the State of the Workplace study presented in Rotterdam, will not close that gap by buying more sensors.

The same film, second screening

Listen to the AI sessions with a workplace ear and the story sounds familiar. A new way of working, imposed from the top, with a business case nobody can prove. Satisfaction drops at first. The early adopters run ahead, the middle follows slowly, the leaders say yes and never use it. Middle managers resist because they measure work by presence or by habit. Success comes from patience, champions, local allocation, small nudges, and making the change visible where it already works.

That is the history of activity-based working, flex office and hybrid work over the last fifteen years. SAP's "be patient, quantify feedback" and Roche's change protocol are the workplace version. SIX's power users, mandatory training and "you don't use it, you lose it" are the AI version. Bühler's "don't change the space for three to six months" and Nina Indina's "make change visible where it already happens" belong to both.

This is awkward for IT and good news for workplace teams. AI programmes are relearning, at great expense, lessons the workplace community already paid for. Lombard Odier had to persuade middle managers that people away from their desks are working. Microsoft needs engaged M1s to make AI stick. It is the same manager, with the same reflex, facing two transformations at once. Run them as one change programme, with one network of champions and one plan for managers, and you save a year on both.

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

One remark from Mark Jenkins deserves more attention than it got. In Teams, Copilot knows who is speaking. It can say who agreed and who did not. In a physical meeting room, it often cannot. “On-premises systems are not seen as equal by all of our employees to our online experience.”

The industry has spent five years fighting for meeting equity, so that remote participants are not second-class citizens. With AI, the hierarchy may flip. The remote meeting is fully transcribed, attributed, summarised and searchable. The in-person meeting leaves a weaker digital trace. If the output of a meeting increasingly lives in AI summaries, the person in the room may become the one who is less visible. Lombard Odier’s single Teams experience in every room and ING’s hybrid meeting programme (Rotterdam) are the right direction. The next spec for meeting rooms is not only “can everyone see and hear”, but “can the AI tell who said what”.

The vendor in the room

A word on who was talking. Like every industry event, Worktech Zurich 2026 mixed practitioners with the companies that sell to them. Several speakers represented vendors (ROOMZ, Sedus, Erich Keller through Stephan Hürlemann’s products, SOA Soundarchitecture), and some sessions were explicit pitches. That does not invalidate the content. A vendor that has installed the same product in two hundred buildings often knows more about what goes wrong than any single client.

But it is worth noting what the vendor stories had in common: the problem is human, and the product helps. The most credible contributions came from clients and practitioners who shared their work in progress with candour: SIX on the difficulty of proving Copilot’s ROI, the BIS on its open questions about capacity, On on optimising after hypergrowth, Lombard Odier on turning a rich data foundation into KPIs.

The IT and digital workplace verdict

If you run IT or the digital workplace, here are the four things to take away.

Lesson one: deployment is the easy part, so stop measuring it. Licences deployed, users enabled, tools launched: those are the metrics of a project, not of adoption. SIX tracks prompts per user and segments users by behaviour. The KPI that matters is whether the tool is opened every day. Jenkins said it took him a couple of months before the Microsoft 365 app was open on his own screen every morning.

Lesson two: FinOps is now a workplace topic. With agents, AI becomes a variable cost that grows with use and with careless use. Token budgets, cost per task and cost per outcome need an owner. Microsoft says it is building model routing that picks the cheapest model for an equivalent outcome. Do not wait for it. Set monthly allowances, track value per department, and train people on cost-aware use before opening agents widely.

Lesson three: the meeting room is the weak point of the AI workplace. If AI attributes speech better in Teams than in the room, the room loses value. The specification for meeting room technology needs to include speaker identification, a consistent join experience in every room (Lombard Odier), and the basics that make a room usable at all: release of unused bookings, availability displays, power at every seat.

Lesson four: the smart building needs its own product team. Lombard Odier separated its smart building team from IT, with data, BIM and technical skills, because IT is driven by business priorities. Whatever the org chart, the building’s data platform needs a product owner, a roadmap and an integration layer. 25 tools without one would be a collection of dashboards.

Weak signals to watch

Candidates who apply with their agents

Orsolya Kovacs-Ondrejkovic reported a CHRO discussion in which young applicants presented themselves to Microsoft with their own agents: “Here’s me, here are my three agents. Hire us as a team.” Most organisations cannot onboard agents for security reasons. That will change, and so will what an “employee” needs from IT and from the workplace.

Autonomous agents inside processes

Microsoft’s “autopilot” marks the move from assistants to agents that act on their own inside workflows. Mark Jenkins is deliberately separating agents’ powers before opening them to users. Governance of agents will become a facilities-scale topic: who can trigger what, in which system, with which budget.

Voice-first work

If teams talk to their laptops instead of typing, open plans built for keyboards will need to be rethought for speech privacy and sound zoning (1.6).

Fit-out as a service

A global real estate strategy lead asked publicly whether flexible fit-out can be leased to protect cash flow, and the designer called renting “the future”. EU circularity rules push in the same direction. Expect leasing offers for furniture and micro-architecture to multiply.

Blue-collar AI and the factory campus

Jan Medřický said the real benefit of AI will come from frontline workers, not only white-collar ones. Bühler showed what the physical side looks like: one campus where engineers, apprentices, factory workers and customers share the same restaurant and walkway.

Comparable environmental passports

In the debrief, the environment group noted that companies have product and building “eco passports”, but edit them for themselves. Their proposal: a globally comparable structure. With CSRD and the European sustainability reporting standards (ESRS) on the horizon, mentioned by the workshop facilitators, the reporting of furniture reuse and fit-out carbon will move from marketing to audit.

What was not said

Three things nobody said. First, no one put a number on what AI agents will do to space. The BIS asked the question out loud. Microsoft’s token capital implies an answer. BCG warned against simple answers. But no speaker offered a method to translate AI adoption into m², meeting rooms or seat ratios. That is the next big modelling job for workplace consultants.

Second, the human cost of AI-intensified work was missing from the sessions we attended. The programme announced a session by Sylvain Rottier on “decision density”, the idea that agentic AI compresses work rather than removing it, with more oversight, higher stakes and a faster cadence for the humans left in the loop. It ran in the parallel stream, and its question went unanswered in the sessions we followed: if agents absorb execution, what does the office need to provide for people whose days are made only of decisions? Focus, recovery and quiet will matter more, not less.

Third, the mid-sized organisation was absent again. Microsoft, SAP, Roche, the BIS, SIX, Lombard Odier, Bühler, On: every case was a large organisation with its own real estate, data and change teams. The company with 500 employees, one site and no smart building manager is the one that most needs these lessons in a ready-to-use form.

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The Sedus Inclusive Journey invites workplace leaders to experience it first-hand at our headquarters, an hour from Zurich: immersive exercises, workshops and co-design with peers, to turn inclusion into concrete workplace decisions.

The journey also extends beyond the workplace, with a visit to the Stoll VITA Foundation and a look at how care and social responsibility can support the wider community.

Sedus is owned by two foundations, Stoll VITA Stiftung and Dr. Karl Bröcker Stiftung, dedicated to environmental protection and youth welfare.

We really care.

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THE MONDAY MORNING PLAYBOOK

Concrete actions by profile

Concrete actions by profile, drawn from the sessions. Each one can start this week.

Workplace directors

1. **Measure your rush hour before you redesign anything.** Pull booking and badge data for Tuesday to Thursday. Count ghost bookings (rooms booked, nobody present) and desks occupied by an absent laptop. The CBRE figures say that is where the friction lives now.

2. **Switch on room release, then explain it.** Free a room automatically when nobody checks in. On's team says the culture shift is the hard part, so launch it with a clear rule and a grace period, not a silent setting.

3. **Fund the places where people meet first.** Bühler started with the restaurant. Lombard Odier gave its best views to collaboration. Pick the one space everybody uses and make it the proof that something has changed.

Corporate real estate leaders

1. **Add an agent scenario to every portfolio decision.** Headcount-led growth, flat headcount with more activity, contraction. Favour decisions that survive all three. Microsoft says it grew revenue 57% at flat headcount. Yours may follow. Plan as if it will.

2. **Re-baseline long projects with the board.** Do as the BIS does: regularly bring key decisions back to the executive committee and ask whether they still hold. It protects the project and turns real estate into a catalyst for change, not a cost centre.

3. **Start the business conversation with value, not workstations.** Peter Baumann's rule: lead with data, and you negotiate desks. Lead with business value, and you are invited. Sum up your contribution across finance, HR and marketing into one story.

Facility managers

1. **Adopt the two-question index.** "How do you feel about this space?" and "Does it make you more productive?" Track by site. SAP steers a global portfolio on these two.

2. **Freeze the space for three to six months after a move.** Ask users to live with the design before changing it, then run a workshop and adapt. Bühler does it on every project. Roche and SAP confirm the satisfaction dip passes.

3. **Use the cheap engagement levers.** Lombard Odier screened World Cup matches at 5:30 a.m. with croissants. On offers one free barista coffee a day. Not every engagement problem needs a strategy deck.

IT and digital workplace leaders

1. **Segment your AI users by behaviour, not by department.** Power users, regular users, inactive users, leaders. Give each group a different programme. SIX found 20% of users generate about 40% of prompts.

2. **Reallocate unused licences.** "You don't use it, you lose it." Make it a published rule, with support offered before the licence is removed.

3. **Write the AI spec for your meeting rooms.** One join experience in every room. A way for AI to know who is speaking. Then test whether an in-room meeting leaves as good a digital trace as a Teams call.

4 **Put a monthly token budget in place before you open agents.** Track cost per task by team, then cost per outcome.

Architects and designers

1 **Design the fixed layer to be neutral, and put identity in what moves.** Ask, for every element: can the team move it, reconfigure it, take it along at the end of the lease? Hürlemann's rock reception desk is the counter-example.

2 **Do a sound map before you do a furniture plan.** Define the mood of each zone, then its sound. Test it blind.

3 **Interview and observe rather than survey.** Bühler's internal team listened to what people do every day before deciding. Surveys tell you what people say they want.

HR leaders

1 **Treat AI adoption and workplace change as one programme.** Same champions, same manager enablement, same patience. The M1 who resists people working away from their desk is the same M1 who never opens Copilot.

2 **Give learning time inside working hours, and protect it.** Microsoft reserves time for AI learning and admits managers fill it with one-on-ones. Block it in calendars and measure whether it is used.

3 **Reach leaders through their ecosystem.** Train chiefs of staff and executive assistants first. SIX and Microsoft both found it is the way in.

4 **Do not give your agents names.** BCG's experiment shows managers catch fewer errors and feel less responsible when an agent is framed as a colleague. Show agents as tools with a human owner.

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“Do I have my laptop?” That should be the only question.

Not “where’s my charger?” Not “is this socket working?”
Not “can I actually work from this room?”

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PART 3 · SESSION RECAPS

Session by session insights

Reference section: the analysis lives in Parts 1 and 2.

01 · PULSE SURVEY

State of the Market: Audience Pulse Survey

Chairs: Susannah Burock (Founder, Susannah Burock Consulting), Ulrike Gruber-Gremlich (Senior Go-to-Market Leader, Microsoft)

A live Slido survey that set the frame of the day, and whose answers were later fed to Copilot for the closing synthesis. The audience's priorities and pain points turned out to be the day's best guide to its contradictions.

Key insights

- Workplace strategies are designed first to optimise employee experience, followed by cost efficiency, real estate optimisation, innovation, collaboration and speed to market.
- The biggest barrier to a more intelligent workplace: slow decision-making and governance, followed by difficulty proving value to leadership.
- The biggest gap in workplace strategy, by a wide margin: measuring and improving the ROI of workplace investment.
- Despite this, the room said it feels confident about its readiness for the next three to five years. Later in the day, it named collaboration versus focus as the hardest tension to get right.

Action → **Run the same four questions with your own leadership team. If they rank experience first and cannot measure it, you have found your first project.**

02 · KEYNOTE

AI in the Flow of Human Ambition

Speaker: Jan Medřický (AI Business Solutions Sales Lead, Microsoft)

Microsoft's Work Trend Index and the "Frontier Firm" story: AI as a turbocharger of human ambition rather than a replacement, a three-phase journey from information gathering to autonomous agents, and a new resource on the balance sheet, token capital.

Key insights

- Leadership AI literacy is one of the biggest blockers. Individual contributors are often more literate than M2, M3 and top leaders. Engaged first-line managers are what takes an organisation into "overdrive".
- Organisations must give people time to learn inside working hours. Microsoft reserves time for it, and admits managers fill it with meetings.
- FTEs become tokens, salaries become the cost of intelligence, and the key metric moves from cost per question to cost per outcome. That requires FinOps and redesigning processes, not adding AI to old ones.

Data. Microsoft claims Swiss customers lead the world in Copilot penetration, with about 50% among its ten largest strategic accounts in Switzerland, and says its own revenue grew 57% in three years at flat headcount (vendor claims, as presented).

> *"As the technology develops, what we can influence is how fast we learn."*

Action → **Audit how many hours per week your people have to learn AI inside working time. Then check whether those hours are used.**

03 · KEYNOTE

Agentic AI in Practice: Preparing the Workforce for an AI-Driven Future

Speaker: Orsolya Kovacs-Ondrejkovic (Partner and Associate Director, People Strategy and HR, BCG)

The most balanced AI session of the day. AI will reshape far more jobs than it eliminates, adoption is slow because of people, and the value comes from redesigning work across tasks, talent and organisation.

Key insights

- 50-55% of US jobs will be reshaped in two to three years, 10-15% are vulnerable to elimination over four to five years or longer, 35% will see limited impact (BCG Henderson Institute).
- 78% of companies say they use AI widely, and nearly as many say they are not good at managing the workforce change it causes.
- Time saved is not headcount saved. Model growth, attrition and retirements, and plan scenarios for the case where implementation fails.
- Reskilling at scale is a major investment: Ericsson spent three years reskilling 15,000 engineers. Amazon runs a two-year programme that turns warehouse workers into software developers.
- Do not name agents or frame them as colleagues: in a BCG experiment, managers caught fewer errors and trusted the work less.

> *"Technology has always replaced tasks and jobs. But it hasn't replaced work."*

Action → **For one function, list its 40 to 50 activities and decide consciously which stay human-led, which go to agents, and which keep a human in the loop.**

04 · CASE STUDY

From Tool Adoption to Work Habit Change: Lessons from Scaling AI in a Regulated Enterprise

Speaker: Mark Jenkins (Head Digital Workspace, Executive Director, SIX Group)

The honest client story behind the AI headlines. SIX rolled Copilot out from 20 licences in July 2024 to every internal user, and learned that access alone does not create adoption. Habits do.

Key insights

- The classic ROI case did not hold: about half an hour saved per day per integrated user could not be aggregated into savings that pay for licences. SIX switched to an enablement argument.
- High-volume users (about 20%) generate about 40% of prompts. About 60% use it every other day. About 5% stay inactive. Leaders often do not open it: go through assistants and one-to-one training.
- Power users allocate licences and training locally. Base training was compulsory for the first 1,500 users. Unused licences are taken back.
- Copilot is less useful in the physical meeting room than in Teams, because it cannot tell who is speaking.

Data. About 4,500 internal employees, about 6,000 users including partners and affiliates. An average of about 100 prompts per user per month. A Copilot Day with about 900 participants, over 20% of employees.

> *"Everyone thinks they need it, but they don't yet realize they need to completely rebuild their life."*

Action → **Track daily opening of the tool, not licences deployed. Then design for the habit.**

05 · EXPERT PANEL

Scaling Workplace Intelligence: From Fragmented Signals to Strategic Decisions

Speakers: Alex Wilkins (Roche), Peter Baumann (SAP), Véronique Neiss (Bank for International Settlements) · Moderator: Philip Tidd (Gensler)

Three heads of large portfolios on how to turn data into decisions. Their answer: a clear decision framework first, fewer and better indicators, quantified feedback, and patience. Perception matters more than the industry admits.

Key insights

- Roche has measured cost, efficiency, environmental impact and perception consistently for more than ten years (FP Score), and added “inspiration” to its portfolio goals around COVID.
- SAP steers globally on two questions: how people feel about the space, and whether it makes them more productive.
- Satisfaction drops after change and recovers. React too early and you undo the change to stop the complaints. Roche sees a 12% average gain in user perception after projects.
- The BIS designs a new tower in Basel without knowing what AI agents will mean for capacity, and re-baselines its key decisions with the board.

> *“The minimum standard of facilities management is total perfection.” (Wilkins) · “If the people don’t like it, we failed our job.” (Baumann)*

Action → **Bring your workplace contribution to the executive committee as business value summed across functions, not as a workstation count.**

06 · CASE STUDY

Transforming a 160-Year-Old Industrial Site into an Innovation Campus for the Future of Work

Speaker: Elvis Pidic (Head Group Architecture and Real Estate Management, Bühler Group)

Ten years and more than CHF 120 million to turn Bühler’s historic site in Uzwil into a small city: R&D centres, an innovation hub, an education and health building, modern manufacturing. Social spaces came first.

Key insights

- The first project was the staff restaurant, to signal a new start to everyone through the one place everybody uses.
- The Cubic innovation centre (about 5,000 m²) connects directly to R&D halls, because people do not walk outside in the rain. The slow barista at its heart is the main meeting point.
- An internal team of 10 to 15 people, with no design competitions and direct access to the family owners, the CEO and the CFO.
- Interviews and observation instead of extensive surveys. After moving in: no changes for three to six months, then a workshop.

Data. 13,000 employees, 140 countries, about 3 billion turnover, 5% of turnover in innovation every year, seven CEOs in 166 years, about 400 apprentices on site.

> *“We can be an enabler. We can build a platform. But what we cannot do is directly influence culture.”*

Action → **Identify the one space every employee uses, and make it your first project.**

07 · TALK

Future-Ready Office Design: A Personal Journey

Speaker: Stephan Hürlemann (Architect and Designer)

A designer trained to create timeless, fixed spaces explains why he now designs offices to change: mobile partitions, micro-architecture, and a fit-out reduced to the minimum.

Key insights

- A PwC project brief grew from about 45 to about 120 people in a few weeks. Fixed systems that take four to five months to reconfigure cannot follow.
- Micro-architecture frees the ceiling: partitions span between the corners of mobile rooms instead of being fixed to the building.
- Part of the fit-out shifts towards elements that keep their value: they can be moved, reused or sold. In his comparison, the flexible option came out cheaper.
- Leasing fit-out elements could improve cash flow, as SAP's Peter Baumann asked from the floor. Flexibility has a financial dimension as well as a spatial one.

Data. 28 kg less steel per mobile partition in its second generation.

> *"It's probably easier to move the building than the entry desk."*

Action → **For your next fit-out, list every element that will be fixed to the building and challenge each one: could it move?**

08 · LIGHTNING TALK

Back to the Office, Back to the Rush Hour

Speaker: Roger Meier (Founder and CEO, ROOMZ)

A five-minute pitch built on a strong market signal: office utilisation is at its highest since 2020, and floors are getting crowded on the same days.

Key insights

- People come back Tuesday to Thursday, creating peaks where everyone rushes to find a space.
- Open-plan desks double as call booths, and noise breaks focus, while some meeting rooms sit empty.
- Existing meeting rooms can work as huddle spaces if people can see availability and book on the spot.

Data. CBRE 2026: 53% average utilisation, 80% average peak utilisation, 111% occupancy (seats allocated against available), 68% come in primarily to collaborate.

Action → **Before adding space, make the space you have bookable on the spot.**

09 · TALK

Designing Mindful Workplaces for Belonging, Performance and Cultural Diversity

Speaker: Sinem Beaujean (Global Engagement Strategist, Sedus)

Transparency note: Sinem co-signs this report. This recap was written by Maxime.

A short session on inclusion as a design practice. Sedus, owned by two charitable foundations, runs immersive programmes to help workplace leaders feel how differently people experience the same space.

Key insights

- The Inclusive Journey at Sedus headquarters brought two groups of clients and partners to co-design around inclusion.
- The Inclusive BoosterCamp followed at Philips' headquarters in Amsterdam, with about 20 participants.
- Cognitive fatigue and diverse needs require choice: places to isolate, to call, to collaborate without a meeting room.

Action → **Test your next layout with contrasting personas (sensory profiles, work styles) before validating it.**

10 · WORKSHOP

The Value Equation: Collective Intelligence Workshop and Debrief (Human + AI)

Facilitators: Key Kawamura (Co-Founder, Studio Banana), Susannah Burock (Susannah Burock Consulting), Georgia Barnasa (Cloud Solution Architect, AI M365, Microsoft)

Delegates split into groups by value dimension (human, business, environmental, financial, future, wider) to define what a valuable workplace means. The results were synthesised live with Copilot and presented "without human sanitation".

Key insights

- 83% chose human value as a defining dimension for the next decade, 67% business, 46% environmental, 30% financial, 28% future (54 respondents). "Experience" and "Purpose" dominated the missing dimensions (36 respondents).
- The future group (our table) converged on adaptability and resilience: we do not know what work will be in five years, so the ability to change may be the workplace currency.
- The environment group proposed to "create less": reuse, multi-purpose spaces, and globally comparable environmental passports instead of self-edited ones.
- At our table, I shared a finding from Booking.com's real estate team, as presented by its global real estate director: the first reason people come in is to meet at least three favourite colleagues, far ahead of any other factor. It echoes the 3-to-5 colleagues threshold presented in Rotterdam.
- Microsoft demonstrated a Copilot agent built on the day's transcripts to summarise meetings.

> *"The future is still very much human." (Burock)*

Action → **Run the six value dimensions with your own steering committee and compare your ranking with the room's.**

11 · CASE STUDY

1Roof: The Early Journey of a Smart and Sustainable Building

Speakers: Nicolas Rogemond (Executive Vice President, Head Buildings and Facility Management, Lombard Odier), Fanny Fayol (Smart Building Manager, Lombard Odier)

One year into operating a new headquarters by Herzog & de Meuron near Geneva, after a ten-year project: what drives attendance, and what it takes to make a smart building useful.

Key insights

- Two collaborative spaces of about 1,000 m² each were full after two days, once middle managers accepted that people away from their desk are working.
- One identical Teams experience in every meeting room cut IT support requests sharply.
- 25 best-of-breed solutions integrated by a building operating system. A dedicated smart building team, separate from IT. A simplified BIM for operations.
- 250,000 data points and a digital twin: the next step is linking the data to business KPIs.

Data. 68,000 m², 2,000+ desks, about 200 meeting rooms, 450-seat dining, 450+ fitness subscribers with no subsidy, 42 showers, 70% soft mobility, BREEAM Outstanding, SNBS Platinum, Minergie, lake water heating and cooling.

> *"We don't do a smart building just for technological gadgets." (Rogemond)*

Action → **Involve your operations team in construction from the design phase. The handover decides success.**

12 · TALK

From Workmode to Workmood: Soundarchitecture for the Emotional Adaptive Enterprise

Speaker: Malou von Gleichenstein (Co-Founder, SOA Soundarchitecture)

Offices design modes, but people respond to moods. Sound is the fastest and most neglected way to shape them, and should be designed, not only reduced.

Key insights

- Sound reaches us faster than vision and travels through the whole space. Most offices sound the same in every zone.
- SOA maps zones (lively, quiet, mixed, circulation, transit), then designs music, silence or nature soundscapes, adjusted through a "sound calendar".
- In a German auditing firm, disapproval of the soundscapes fell to 3%, where opinions on the office coffee usually split fifty-fifty.
- Neurodivergent people need diversity of sound environments: for some, silence is the problem.

Data. +74% willingness to talk, +22% social interactions, +30% longer conversations, +30% well-being (SOA slide, sources not shown).

> *"When you don't design how the room speaks, it will just find its own language."*

Action → **Record ten minutes of sound in each zone of your office. If they sound alike, start designing.**

13 · CLOSING KEYNOTE

Zooming Out of Tech

Speaker: Nina Indina (Program Director, Digital Twin, VP Infrastructure and Sustainability, ETH Zurich)

The closing keynote zoomed out of technology to ask why change does not stick. The answer lies in how brains filter reality, and in how organisations misuse change frameworks.

Key insights

- Only a tiny fraction of the millions of bits of sensory information we receive every second reaches conscious awareness. People interpret change through what they know and what threatens them, and feel losses about twice as strongly as gains.
- 95% of organisations report zero return on AI investment (MIT NANDA, 2025). Only 6% are AI high performers (McKinsey). 80% report individual productivity gains.
- You cannot install a mindset. Behaviour is a function of the person and their environment. Work on relevance, narratives and access instead of mindset, communication and training.
- Change happens in the overlap between what the organisation needs and what people can and will do.

> *"Technology is the answer. But what was the question?"*

Action → **Find the teams already using the tool you want to roll out, and make their reality visible before launching any campaign.**

Sessions on the programme not covered in this report (held in the parallel AI stream while we attended the workplace design stream): "Driving AI Adoption at Scale: How Swiss Re Is Turning Experimentation into Enterprise Value" (Gabriel Schaepman, Swiss Re; Bence Orban, Microsoft) and "The Decision Density Crisis: What Agentic AI Creates as Human Challenge in Organizations" (Sylvain Rottier, MindMarqs).

CLOSING

Conclusion

Rotterdam was about friction: the small obstacles between people and their best work. Zurich asked a bigger question. **The obstacle is no longer a tool, a room or a policy. It is the capacity of organisations to change how they work, at the speed the technology now allows.**

Seen that way, the day's cases line up as one method. Redesign the work, not only the tools (BCG). Turn access into habit, user group by user group (SIX). Reach the managers in the middle, because they slow both AI and space adoption (Microsoft, Lombard Odier). Measure fewer things, and give people time before you measure (SAP, Roche). Plan for a business whose growth may no longer follow its headcount (Microsoft, the BIS). Build so that the space can change as fast as the brief (Hürlemann, Bühler). Design how spaces feel, not only what they are for (SOA, Sedus). Start with the places people gather, and put technology at their service (Bühler, Lombard Odier, On).

None of this requires a spectacular building. On Labs shows it from the other side: one of the most beautiful offices in Europe carried its growth on the strength of its culture, and is now fine-tuning bookings and desk use to match. Design sets the stage. People and operations make it work. The competitive edge in the next cycle will go to the organisations that treat human adoption as the core of their workplace strategy and their AI strategy at the same time. It is the same bottleneck. It needs the same people to open it.

> *The technology is ready. The buildings are ready. The bottleneck is how fast organisations learn. In the next decade, the best workplace will not be the smartest one. It will be the one that helps people change.*
>
> The Human Bottleneck · Final statement

This report crosses 13 sessions from Worktech Zurich 2026 with the live audience polls, the slides shared, our notes from the workshop we took part in, and the On Labs and Novu Campus tours. Quotes are from the conference sessions and tours, lightly edited for readability. Figures quoted from vendors are attributed to them and presented as their claims.

ABOUT

About the authors



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Engineer and entrepreneur, Maxime Cousin co-founded Osol following a technology transfer programme from the European Space Agency (ESA) and CNES. He advises companies on workspace transformation and contributes as an analyst and speaker on workplace strategy, the future of work and innovation in corporate real estate.

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Sinem brings together companies, workplace leaders, experts and designers to explore how work and workplaces are changing. At Sedus, she develops engagement initiatives that connect client experience, workplace insight and new approaches to inclusion, including the Inclusive Journey and Inclusive BoosterCamp.

osol.

ABOUT OSOL

Osol developed the first secured smart battery fleet for modern workspaces. The company helps real estate, workplace and IT leaders improve the workplace experience across their sites, achieve significant cost savings and reduce their carbon footprint, by eliminating power cables, fixed sockets and laptop chargers from meeting rooms, hybrid spaces and informal work environments.

Made in Europe and deployed across 15 countries with 120+ international enterprise clients, Osol has received multiple Workplace and CSR awards and is part of the Solar Impulse Foundation's World Alliance solutions.

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ABOUT SEDUS

Sedus is a German manufacturer of furniture and workplace solutions, owned by two foundations dedicated to environmental protection and youth welfare. With more than 150 years of innovation in ergonomics and design, the company helps organisations create high-performing, healthy and sustainable workplaces.

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THE HUMAN BOTTLENECK

The technology is ready. The buildings are ready. The bottleneck is how fast organisations learn. In the next decade, the best workplace will not be the smartest one. It will be the one that helps people change.

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