INDUSTRY REPORT

What the World Workplace Europe tells us about the Workplace of Tomorrow

AI, data, hybrid, sensory inclusion, and circularity.
Analytical report from World Workplace Europe 2026.

Prepared by Osol and Sedus · March 2026

CONFIDENTIAL

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CONTEXT AND POSITIONING

World Workplace Europe 2026
The Hague, 11-12 March

World Workplace Europe 2026 took place on 11-12 March at the Fokker Terminal in The Hague, Netherlands. Organized by IFMA, the annual European facility management event was themed **"The Evolving Edge: Innovation, Inclusion & Impact in FM."**

This report is not a session summary. It is a **cross-cutting analysis**. We cross-referenced 19 conferences to extract convergences, contradictions, weak signals, and actionable insights. For those who manage, design, or decide the future of workplaces in Europe.

What strikes first is the omnipresence of AI. Present in almost every session. But what strikes next is the **colossal gap between the technological promise and the ground reality**. The opening keynote talks about autonomous agents, Level 5, humanoid robots. Practitioners talk about inaccessible data, reactive maintenance, and 78 suppliers on a single site with no unified platform.

This tension is what makes this event so rich. And it structures this report.

Methodology

19 conferences analyzed in real-time by Maxime Cousin and Sinem Beaujean, with contributions from Calle Sagbom. Over 50 experts and practitioners. Complete transcriptions were synthesized, cross-referenced, and restructured into six cross-cutting mega-trends, complemented by 19 individual session recaps and 10 concrete actions.

WHY MAXIME (OSOL) AND SINEM (SEDUS) PUBLISH THIS REPORT

Osol develops the first smart battery network for workspaces: zero cables, zero chargers, zero construction. Sedus is a German manufacturer of furniture and workplace solutions, owned by two foundations. This report is our contribution to the workplace ecosystem. It is independent, factual, and freely distributable.

OVERVIEW

6 mega-trends, 19 sessions, 1 central message

World Workplace Europe 2026 reveals an FM sector in accelerated transformation. AI is omnipresent but 95% of pilots fail to scale... because of data. Hybrid is no longer a debate about days but an ongoing conversation. And FM must choose: become strategic or disappear.

1 **AI between promise and reality.** 47% automation at IKEA, but only 28% of companies convert AI investment into value. The Jevons Paradox destroys the substitution myth.

2 **Data is the bottleneck.** Data is unfindable, inaccessible, non-interoperable. 78 suppliers on one site, no unified platform. No AI strategy without a data strategy.

3 **Hybrid is a conversation.** The psychological contract has changed irreversibly. 5-day mandates are disguised attrition. Mature organizations invest in dialogue.

4 **Sound is the invisible architecture.** 30% acoustic dissatisfaction for 15 years, zero progress. 1 in 5 people is neurodivergent. Sensory zoning replaces headphones.

5 **Sustainability moves to the operating statement.** 76% of emissions are scope 3 (embodied carbon). FM is naturally circular: extend, maintain, maximize lifespan.

6 **FM becomes strategic or disappears.** Sanofi recruits hospitality profiles for FM. The FM Analyst is a mindset, not a title. Storytelling, business translation, cross-functional thinking.

osol. **120+ companies have eliminated cables from their hybrid spaces with Osol.** Lower costs, more flexibility, and employees finally free to work wherever they want. OSOL.CO →

sedus **The office is no longer a place, it's an experience to orchestrate.** Sedus designs spaces as sensory landscapes, where furniture, acoustics, and zoning accommodate focus, collaboration, and cognitive diversity. SEDUS.COM →

QUOTE

"Don't start with the efficiency question. Start with what is valuable and meaningful.

Begin niet met de efficiëntievraag. Begin met wat waardevol en betekenisvol is.
Felix Faassen, Manager AI Lab, Ifmec Consultancy: on the human approach to AI in facility management

SECTION B · STRATEGIC SYNTHESIS

6 FM Mega-Trends

Cross-cutting analysis of 19 conferences. What World Workplace Europe 2026 reveals about the future of facility management and workplaces.

TREND 1

AI between promise, reality and human risk

AI dominated World Workplace Europe 2026. Not a single panel or roundtable that didn't discuss it. But behind this omnipresence, the event revealed three very different realities depending on the speaker's position in the value chain.

The promise: staggering gains

Remy Gieling's keynote set the stage. IKEA automated 47% of its customer service and retrained 8,500 agents into design specialists: result: $1.4 billion in additional revenue. Ahold operates 40,000 AI agents. A single system equals 40 FTEs. Gamma, the AI presentation tool, has 50 million users for 28 employees.

> *"People telling you that AI is there for augmentation are bullshitting you. This is full automation of very highly skilled work.*
>
> Mensen die je vertellen dat AI bedoeld is voor augmentatie, liegen je voor. Dit is volledige automatisering van zeer hoogwaardig werk.
>
> Remy Gieling, opening keynote

The reality: 95% of pilots fail to scale

Felix Faassen (Ifmec Consultancy) provided the most structured counterpoint. Citing MIT: 95% of AI pilots fail to scale. The EY figure confirms: out of 17,000 respondents, only 28% convert AI investment into real business value.

The Jevons Paradox* applied to AI

When a technology makes something more efficient, we don't use it less: we create more demand. Geoffrey Hinton predicted the disappearance of radiologists. Ten years later: record number of open positions and +48% salary. Why? Reading scans represents only 30% of their work.

** The Jevons Paradox states that when a technology makes the use of a resource more efficient and cheaper, it can ultimately lead to consuming more of it overall.*

> *"Don't start with the efficiency question. Start with what is valuable and meaningful.*
>
> Felix Faassen, Ifmec Consultancy

The human risks nobody wants to see

Three concrete risks emerged. **The junior pipeline threat:** if AI does the work of beginners, where do we train future professionals? One million young people unemployed in the UK since Covid. **Cognitive burnout:** if AI handles all routine tasks, professionals are in permanent cognitive overload. **The professional identity crisis:** when 25 years of investment in a profession are made obsolete, the loss is not just economic.

> *"If you worked for 25 years in a profession, invested in those skills, and a process takes that away*
>
> Als je 25 jaar in een vak hebt gewerkt, in die vaardigheden hebt geïnvesteerd, en een proces neemt dat weg
>
> Felix Faassen

The cost will explode

Gieling confirms: AI service costs will multiply tenfold within three years. Optimizing between expensive frontier models and local open-source models will become a strategic competency.

What must remain human. Forever.

Felix Faassen, inspired by Viktor Frankl, sets an ethical framework. **Creation:** imagining what doesn't exist. **Connection:** being together, looking at each other, comforting each other. **Courage:** finding meaning in the face of adversity. "These things should be our domain forever."

→ KEY TAKEAWAY

AI doesn't replace professions. It transforms what is valuable in those professions. The real challenge isn't technological: it's human: protecting the junior pipeline, preventing cognitive burnout, and preserving creation, connection, and courage as human prerogatives.

TREND 2

Data, not AI, is the real bottleneck

If AI was the most visible theme of the event, data was the most painful one. Session after session, the same observation: FM organizations don't have an AI problem. They have a data problem.

Data is unfindable and non-interoperable

FM organizations have their data scattered across BMS systems, Excel files, contractor systems, and ad hoc tools. A representative from the Finnish forestry industry describes 78 suppliers on a single production site with no unified platform. Matt Tucker confirms: faced with fragmentation, practitioners create their own off-system spreadsheets.

> *"Almost no one can access all their FM data from one system. Most use five or more systems. Many professionals go rogue and create their own spreadsheets offline.*
>
> Bijna niemand heeft toegang tot al hun FM-data vanuit één systeem. De meesten gebruiken vijf of meer systemen. Veel professionals gaan hun eigen weg en maken offline spreadsheets.
> Matt Tucker, closing keynote

The digital twin: the majority is at level 1

Jamie Iskander (Autodesk) presents five maturity levels: descriptive, informative, analytical, simulation, self-adjustment. Most FM organizations are still at the descriptive level.

FMHaaglanden: 600,000 m² in 3D BIM

Bas Wolse describes how the Dutch government FM organization moved from 2D CAD to 3D BIM. Before: 7 full-time people in AutoCAD just to keep plans up to date. Sensors in stairwells applaud when someone takes the stairs instead of the elevator.

> *"Single view of truth, not single point of truth.*
>
> Eén weergave van de waarheid, niet één enkel punt van waarheid.
> Bas Wolse, FMHaaglanden

→ KEY TAKEAWAY

No AI strategy without a data strategy. The priority is not AI: it's the data foundation. Map your sources, demand ownership in every contract, and aim for level 2 before dreaming of level 5.

Data ownership when outsourcing

A recurring theme in the roundtables. When an organization outsources cleaning, it also outsources the data about cleaning. When the contract ends, the data leaves with the provider. The consensus: the FM organization must own its data, even when services are outsourced.

A former Novo Nordisk employee (now at Schneider Electric) describes a predictive maintenance project on ultra-low temperature freezers (-80°C) conducted for a year with DTU university. Abandoned because operators didn't have time for trend analysis. The Spanish FM provider summarizes: *"Everybody works in a reactive way. Preventive maintenance is lovely. A dream. Normally not possible."*

TREND 3

Hybrid is not a policy. It's an ongoing conversation.

The "Beyond Mandates" panel was one of the richest sessions of the event. The psychological contract has changed irreversibly. During Covid, professional identities were recomposed. People discovered new roles simultaneously. Going back means breaking that trust. 5-day mandates are disguised attrition.

> *"In that Christmas tree, everything below stays dark.*
>
> In die kerstboom blijft alles eronder donker.
>
> Bart Lugtenberg, NXP Semiconductors: when 2 out of 10 leaders don't follow

NXP: 35,000 employees, 40 countries, one hybrid policy

Bart Lugtenberg shares three challenges. Every country is different: in France, when the boss says come, you come; in the Netherlands, no one tells anyone what to do. Second challenge: the live demonstration "tap your head / tap your chin" shows that when the leader demonstrates the chin, 80% tap the chin. People imitate, they don't listen. Third: 5-day mandates are a layoff lever. "Who leaves easily? The best."

5-day mandates as a layoff lever

Direct question from the audience. Unambiguous answer from Bart: ethically, no. And strategically, it's self-destructive. "Who are the ones that can leave easily? The best people."

40 hours of AI training: the tipping point

Jessica Schmidt (EY) provides a precise data point. Below 40 hours of AI training, people leave for salary. Above, they leave for development. The real risk isn't AI: it's not developing people fast enough. Training isn't enough: you need a complete employer proposition (flexibility, purpose, growth).

> *"People don't do as leaders say. People do as leaders do.*
>
> Mensen doen niet wat leiders zeggen. Mensen doen wat leiders doen.
>
> Bart Lugtenberg, NXP Semiconductors

→ KEY TAKEAWAY

The "how many days in the office" debate is the wrong question. The right one: when and why does presence create value? And align your leaders with each other first before asking anything of the teams.

PwC, TenneT and the "candle pattern"

PwC Netherlands: 800 to 900 new joiners per year, 15% annual turnover. Junior-senior cohesion is critical because juniors learn through mentorship. PwC doesn't mandate days: they make the office attractive. They internalized event space costs to boost internal usage.

TenneT: 100 onboardings per month. The "electricity campus" concept in Arnhem aims to attract other energy transition companies. "Making a friend at the office is one of the biggest binding factors for colleagues to stay."

The "camelback Wednesday": we assume Tuesday-Wednesday-Thursday. But in the Netherlands, Wednesday is a massive part-time day. Data shows very different patterns across countries.

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Docking stations eliminated the charger at the workstation. Osol eliminates it everywhere else. Better experience, lower costs, zero construction.

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TREND 4

Sound is the invisible architecture of the office

Two complementary sessions converged on a finding the sector has refused to face for fifteen years. Sound is the #1 frustration factor in the office. And almost nothing has been done to solve it.

15 years of measurement. Zero progress.

Rainer Machner (Ecophon Saint-Gobain) cites Tim Oldman from the Leesman Index: after 15 years of systematic measurement, acoustic dissatisfaction remains around 30%. 1 in 5 people is neurodivergent (up from 1 in 7 three years ago). For them, sound is challenge #1.

> *"I cannot describe how much management it takes to navigate a day in a normal office environment.*
>
> Ik kan niet beschrijven hoeveel management er nodig is om een dag in een normale kantooromgeving door te komen.
>
> Sarah Tancell, founder of Neuro-D.

Noise-canceling headphones are not a solution

Sarah is categorical. "We're neuro-inclusive, we give everybody noise-cancelling headphones. No." Silence isn't either: counter-intuitively, it's uncomfortable for many neurodivergent people: it creates agitation and amplifies tinnitus.

Sensory zoning and reactive soundscaping

The solution: design zones with different sound profiles. A gradient of intentional sounds. Fran Board (Moodsonic) describes systems that adjust sound profiles in real-time. And technical solutions alone only resolve 30-35% of complaints: you need to combine technique, organization, and behavior (the T.O.P. framework).

→ KEY TAKEAWAY

If you don't design the sound of your space, you design distraction. The winning triptych: intentional sensory zoning, reactive soundscaping, and acoustic etiquette co-created by teams.

Sensory heat maps and T.O.P.

Show employees in real-time where activity is, where it's quiet, which sound profiles play in which zones. It gives control. And control reduces anxiety.

Rainer Machner's **T.O.P. (Technical, Organizational, Personal)** adapts a framework from occupational health. Technical solutions alone (acoustics, materials) only address 30 to 35% of complaints. The ear is a primitive survival system that evaluates safety 24/7. You don't get used to human speech: it's evolutionary.

A **free ISO calculator** from Ecophon replaces acoustic simulations costing €5,000-10,000. You input a floor plan, define activities per zone, and the calculator indicates the distance and partitioning required. Proactive design removes the need for disclosure for neurodivergent people: stigma prevents many from revealing their condition.

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The importance of peripersonal space. Neuroscience research shows that concentration also depends on the degree of control over our immediate environment. Sedus INSIGHTS N°20 examines this central concept. **Learn more →**

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TREND 5

Sustainability moves from promise to operating statement

Three sessions painted an ESG landscape in full transformation. Less declarative enthusiasm. More operational pragmatism. And a refocus on what FM can actually control.

Operational carbon is only 24% of the problem

Redney Janssen (Planon) lays out the figures. In a typical UK commercial building, scopes 1 and 2 represent 24% of emissions. The remaining 76% are scope 3: embodied carbon. And the share is growing: 25% in 2020, 32% in 2025, projected 50% in 2030.

90% of buildings standing today will still be there in 2050. The retrofit need is massive. A well-maintained asset is 30 to 60% more sustainable.

> *"The most sustainable square metre is the one you don't need.*
>
> De meest duurzame vierkante meter is degene die je niet nodig hebt.
>
> Redney Janssen, Planon

From circular economy to spherical economy

Michael Amos pushes the framework further. The circular economy focuses on the "what" (materials, flows). The spherical economy adds the "who": working conditions, fair wages, modern slavery. 90% of UK companies potentially have modern slavery in their supply chain.

The cost of inaction: £1.6 million over 5 years

For a 2,000-person office, Hélène Carpentier calculated the cost: £1.6 million of which £1 million is controllable through circular initiatives. Procurement holds the keys to circularity.

→ KEY TAKEAWAY

FM is naturally circular. Extending assets, maintaining, maximizing lifespan: that's the core of the profession. The opportunity: transform this competence into a formalized ESG strategy communicable to the C-level.

ESG deprioritized in favor of AI

Several participants observe: the topic of the year changes every year. This year, it's AI. ESG takes a back seat. A participant from the Finnish forestry industry summarizes: building energy represents 1 to 2% of total process consumption. Building ESG reporting carries no weight in the overall report.

> *"FM can be the Netflix of facilities management: delivering equal or better service with less stuff.*
>
> FM kan de Netflix van facility management worden: gelijke of betere service leveren met minder spullen.
>
> Hélène Carpentier, Circular Workplaces

Waste is the most visible interface between the occupant and sustainability. More visible than LEDs. A single furniture clearance at Mitie exceeded two years of carbon savings measured by the CSR department.

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Sedus is owned by two foundations, Stoll Vita Stiftung and Dr Karl Bröcker Stiftung, dedicated to environmental protection and youth welfare. Ronald Gerber from Six sums it up: "I'll buy Sedus thinking of the foundation's flowers and the children's joyful cries." **Learn more →**

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TREND 6

FM becomes a strategic function. Or disappears.

The strongest signal of the event runs through the entire day. FM is shifting from an operational function to a strategic one. But this shift is neither guaranteed nor automatic.

Sanofi recruits hospitality profiles for FM

Ömer Döne (Sanofi): "We are creating an experience. The workplace is a tool. We are looking for people who managed hotels in the past." Sanofi's AI concierge handles simple queries; sensors predict temperature before participants arrive; air quality improvement alone boosts cognitive performance by 61 to 100%.

> *"The biggest challenge in the world of facilities is not place, it's people.*
>
> De grootste uitdaging in de wereld van facilities is niet de ruimte, maar de mensen.

The FM Analyst: a mindset, not a title

Matt Tucker (closing keynote) presents six behavioral traits: curiosity, storytelling, pattern recognition, data confidence, problem solving, cross-functional thinking. These are not technical skills. RADA (the British drama school) has a business unit that teaches storytelling to companies.

Event management as big as technical services

Since Covid, event management has grown to equal technical services in some FM operations. PwC made its event spaces free for BUs. The office becomes a social gathering place.

→ KEY TAKEAWAY

FM has a window of opportunity. Either it evolves into a function that speaks the language of business, translates data into decisions, and creates experience. Or it stays operational and gets marginalized. The tools exist. What's missing: storytelling, translation, and cross-functional thinking.

The FM profile of tomorrow

The AI & FM panel converges. Eve Wilkinson-Bell (HERE Technologies): AI handles admin, teams focus on human connection. Jessica Schmidt (EY): **toolset, skillset, mindset**: the three leadership capabilities needed for AI. Not just the tools. The skills to use them. And the mindset to adopt them.

> *"On a topic of 37 experts talking about technology, analytics, data, the conversations always led to human-oriented traits.*
>
> Bij een onderwerp waar 37 experts praatten over technologie, analytics en data, leidden de gesprekken altijd naar mensgerichte eigenschappen.
>
> Matt Tucker, IFMA, closing keynote

Don't collect data if you're not going to do anything with it. Eve Wilkinson-Bell describes offices where leaders want occupancy sensors, but when data shows 3 out of 10 people come in, they refuse to reduce desks or mandate presence. Church attendance is rising in the UK because the office has lost its community function.

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Osol helps workplace, IT, and real estate teams create more flexible and cost-effective spaces. No more cables, reorganization works, or lost chargers. Freedom at last.

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BEYOND THE TRENDS

Weak signals and questions unresolved

Beyond the six mega-trends, the event surfaced signals that deserve monitoring.

- **China dominates 57 of the 64 deep tech domains.** Xiaomi: autonomous car factory in 14 months, 30,000 cars at one third the German price. 996 culture: six days, 9am-9pm.
- **Humanoid robots are the next battleground.** XPeng, Figure AI, Tesla Optimus (target: 1 million units by 2027). Ubitech builds robots with interchangeable batteries for 24/7 operation.
- **Waymo is coming to London.** 35% cheaper than Uber in Phoenix. FM implications: parking, building access, fleet management.
- **Security robots are moving from hype to use.** Robot-dog patrolling in Hong Kong. Tipping point: when a robot costs less than half an agent.
- **WhatsApp as a mandatory layer in LATAM.** "If any agentic tool doesn't have a WhatsApp layer, we don't use it." : Rebeca Arguedas
- **Africa could become the fastest FM market.** Mostly on Excel and paper, but enormous learning appetite and technological workarounds (WhatsApp rather than email).
- **Church attendance is rising in the UK** because work no longer provides social connection. The office has lost its community function.
- **MIT Building 20: innovation comes from autonomy, not design.** An ugly, drafty building that became a source of innovation because nobody ever asked permission to knock down a wall.

> *"The office is not obsolete, but it is changing into something that facilitates community rather than a bunch of PowerPoints.*
>
> Het kantoor is niet achterhaald, maar het verandert in iets dat gemeenschap faciliteert in plaats van een hoop PowerPoints.
> Participant, "The End of Work as We Know It" debate

osol. **Electricity is the last thing that locks down your spaces and your people.** Well, it was! OSOL.CO →

"Got my laptop?"

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SECTION C · CONFERENCE-BY-CONFERENCE INSIGHTS

19 session recaps

Condensed summary of each conference analyzed. For a deeper dive into a specific session.

SESSION 01

Opening Note IFMA Board

Christa Dodoo, IFMA Board

Key takeaway: Institutional opening framing innovation, inclusion, impact. 53% of organizations have implemented flexible space strategies (+38% since 2020).

Key insights:

- Universal design from the start, not in reaction to recruitment
- FM must lead, not follow. EU goal: net-zero and climate-resilient buildings by 2050

Data: 53% flexible organizations (+38% since 2020)

SESSION 02

Opening Keynote : Remy Gieling

Remy Gieling, co-founder AI.nl

Key takeaway: Keynote in three acts: what's happening in the world (China, robots), in organizations (IKEA, Ahold), and what anyone can do (Claude, voice-first).

Key insights:

- Recommendation to switch from ChatGPT to Claude for business use
- The 'shadow org chart': every department has its AI agent team
- Voice is 4x faster than keyboard. Voice-first = +60% efficiency

Data: IKEA: 47% automation, $1.4B revenue · Gamma: 50M users, 28 employees

> *"A fool with a tool is still a fool." : Remy Gieling*

SESSION 03

Beyond Energy Efficiency

Redney Janssen, Planon

Key takeaway: The shift from operational carbon (24%) to embodied carbon (76%). Net zero means zero: negative emissions are needed.

Key insights:

- Scope 3 goes from 25% (2020) to 50% (2030)
- 90% of current buildings will still be there in 2050
- Well-done maintenance is 30-60% more sustainable

Data: 24% scope 1-2 vs 76% scope 3 · 50% of waste comes from buildings

SESSION 04

EY Future of Work (Live Podcast)

Matt Tucker (IFMA) · Jessica Schmidt (EY)

Key takeaway: The 'Bricks, Bytes and Behaviours' framework. Value is only created when all three are aligned intentionally. Only 28% convert AI into value.

Key insights:

- Jessica Schmidt refutes generational discourse: what matters is life stage
- The FM talent gap is coming: a large portion of FM workforce retires within 5 years
- Toolset, skillset, mindset: the three leadership capabilities for AI

Data: 17,000 EY respondents · 28% AI conversion to value · 40h AI training threshold

> *"If you don't understand the people, you're going to struggle with the solutions." : Jessica Schmidt, EY*

SESSION 05

Why AI Forces Us to Become More Human

Felix Faassen, Ifmec Consultancy

Key takeaway: The most philosophical session. 95% of AI pilots fail. The Jevons Paradox destroys the substitution myth. Creation, connection, courage: three things to keep human.

Key insights:

- The Ifmec agentic prototype: agent connected to TOPdesk APIs
- The 'watermelon metrics': KPIs green on the surface, red inside
- Radiologists: +48% salary despite AI

Data: 95% AI pilots fail (MIT) · 80%+ US stock gains linked to AI

> *"Organisations driven only by algorithms will all look the same." : Felix Faassen*

SESSION 06

Beyond Handover : Connected Facilities

Fred Kloet · Susan Clarke · Jamie Iskander (Autodesk) · Bas Wolse

Key takeaway: Roundtable on data and digital twins. The 'digital thread' as a framework for managing data across asset lifecycles.

Key insights:

- 7 full-time people in AutoCAD to maintain plans
- Sensors in NL government stairwells that applaud
- Autodesk: spatial intelligence, not LLM replication

Data: 600,000 m² in 3D BIM · 12 buildings · Roadmap 2028

SESSION 07

Beyond Mandates : Reframing Hybrid

Mia Öhrn · Bart Lugtenberg (NXP) · Dr. Yoy Bergs · Tim Allen (HCG)

Key takeaway: The richest session on hybrid. NXP: 35,000 people, 40 countries. Mandates are the default reflex when you avoid the real conversation.

Key insights:

- NXP: €20M redesign based on personas
- The live demonstration 'tap your head / tap your chin'
- Rousseau's psychological contract: changing the policy = breaking the contract

Data: NXP: 35,000 employees, 40 countries, €20M

> *"We default to the simple conversation because we're not ready to have the difficult conversation." : Tim Allen, HCG*

SESSION 08

Driving ESG in FM

Michael Amos, Waste to Wonder Worldwide

Key takeaway: The spherical economy (human + material) vs circular. 90% of UK companies potentially have modern slavery in their supply chain.

Key insights:

- 17,000 schools equipped in 50 countries through furniture redistribution
- Social enterprises: 70% more resilient post-Covid
- Savills targeting net zero by 2040

Data: ~2,500 tonnes/year redistributed · CBRE GWS: 1.3M kg carbon saved

> *"One furniture clearance dwarfed two years of carbon savings." : Michael Amos*

SESSION 09

Strong Together at a Distance

Maurice Verwer (PwC) · Thijs Bullman (TenneT) · Harm van den Boogaard · Natalie Hofman

Key takeaway: The Dutch 'candle pattern'. Social cohesion strategies of major NL organizations. Working from home perceived as an acquired right.

Key insights:

- PwC: nudge, not mandate. Event costs internalized
- TenneT: electricity campus and friendships as retention factor
- Event management as big as technical services

Data: PwC NL: 800-900 hires/year · TenneT: 100 onboardings/month

> *"Just because you can't measure something doesn't mean it doesn't matter." : Mark Catchlove, MillerKnoll*

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SESSION 10

From OT Data to Business Continuity

Maarten de Bruin (Planon) · Schneider Electric

Key takeaway: IT/OT convergence. 2/3 of organizations see a viable business case but execution lags. The C-suite vs operations gap kills predictive projects.

Key insights:

- Ex-Novo Nordisk: -80°C predictive maintenance, abandoned due to lack of time
- Compass Group DK: property owners refuse data sharing
- Everyone speaks the C-level language, no one translates

Data: 2/3 viable business case · Execution far behind

SESSION 11

Design with Impact

Mark Catchlove, MillerKnoll

Key takeaway: Interactive workshop. The 'old pair of slippers syndrome': people are attached to their space. The 'crusty middle': under-trained middle managers blocking change.

Key insights:

- Menopause as a new FM challenge: temperature fluctuations in open-plan
- The puzzle on the big table: simple, powerful for connection
- DJ DePree's innovation: judging companies by their impact on humanity

Data: 40 years office furniture experience · Kate Usher: menopause in the workplace

> *"I have never seen as much change as in the last 5 years." : Mark Catchlove*

SESSION 12

The Future of Workplaces Is Circular

Matt Tucker (IFMA) · Hélène Carpentier (Circular Workplaces)

Key takeaway: FM can disrupt the waste industry. £1.6M cost of inaction over 5 years. Procurement holds the keys.

Key insights:

- The obsession with ownership hinders circularity
- The capex → opex shift requires cultural restructuring
- Three levers: cost reduction, compliance, workplace experience

Data: £1.6M over 5 years (inaction) · £1M controllable

> *"Waste is your inefficiency, and it is visible." : Hélène Carpentier*

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At Sedus, "we really care" is not just a slogan, but the translation of foundation ownership into social impact that goes beyond the well-being experienced through furniture solutions.

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SESSION 13

AI and FM : The Missing Part of CRE

Emir Sarialan (CBRE) · Eve Wilkinson-Bell (HERE) · Ömer Döne (Sanofi) · Zisis Vomva (Deloitte)

Key takeaway: FM as the missing piece of CRE. Three stages: traditional, integrated, strategic. Sanofi: from reactive ticketing to predictive environment.

Key insights:

- Monthly HERE newsletter generated by AI from sensor data
- Air quality: +61 to 100% cognitive performance
- Sanofi recruits hospitality profiles for FM

Data: +61-100% cognitive perf from air quality

> *"Don't collect data if you're not going to do anything with it." : Eve Wilkinson-Bell*

SESSION 14

The End of Work as We Know It

Richard Stoop, PROCOS Group

Key takeaway: Provocative debate format. Four topics: obsolete office (no but it's changing), design = waste (without change management yes), DEI and virtue signalling.

Key insights:

- MIT Building 20: innovation through autonomy, not design
- Designer who eliminated their desk: 'Mental health is dropping rapidly'
- The DEI debate exposed the discomfort around the topic

Data: Unique format · Valuable qualitative tensions

> *"If you try to please everybody, don't you please nobody?" : Richard Stoop*

SESSION 15

Transitioning from Reactive to Proactive

Joep Verschuur · Jonathan Francis (Honeywell)

Key takeaway: The gap between predictive ambition and reactive reality is immense. 78 suppliers on one site, no unified platform.

Key insights:

- Mandatory maintenance done (fire alarms). The rest postponed
- Pilots convince better than business cases
- 30 days to get a technician in Europe

Data: 78 suppliers/site · 30 days for a technician · ESG = 1-2% of process

> *"Everybody works in a reactive way. Preventive maintenance is a dream." : Spanish FM provider*

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SESSION 16

Agentic AI in Facility Management

Geoff Williams · Ted Ritter · Martin Ruppe · Rebeca Arguedas

Key takeaway: The most concrete panel on agentic AI. Generative vs agentic distinction. Prediction: no more traditional help desks.

Key insights:

- Verkada: security, theft detection. Facilio: multilingual agentic CMMS
- Waymo in Phoenix: 35% cheaper than Uber, expanding towards London
- 2031 market: Asia at 45%, surpassing North America

Data: IFMA IT: 12,000 members · Waymo 35% cheaper than Uber

> *"Is it really working yet? Can we afford it yet? Maybe." : Ted Ritter*

SESSION 17

Beyond Noise Cancelling Headphones

Fran Board (Moodsonic) · Sarah Tancell (Neuro-D.)

Key takeaway: The most concrete session on neurodiversity. 1/5 neurodivergent. Sound = challenge #1. The WELL Building Standard now integrates neurodiversity.

Key insights:

- Proactive design removes the need for disclosure
- Ubisoft case: assistance for mandated return-to-office for neurodivergent people
- Sensory transition spaces between zones

Data: 1/5 neurodivergent · Sound = #1 challenge

> *"Sound matters. It's about creating environments that others don't need to adapt to." : Sarah Tancell*

SESSION 18

Distraction-Free Workplace

Paige Hodsman · Rainer Machner, Ecophon Saint-Gobain

Key takeaway: Technical and systemic angle. The T.O.P. framework (Technical, Organizational, Personal). The ISO 2021 standard links acoustics and activities.

Key insights:

- The ear = primitive survival system, 24/7
- Anna's story: arrived motivated, cascading distractions, decision to work from home
- Scandinavian case study: psychoacoustic survey → co-created house rules

Data: 30% dissatisfaction (15 years) · 30-35% resolved by technical solutions alone

> *"If you don't design the sound, you design distraction." : Paige Hodsman / Rainer Machner*

SESSION 19

Closing Keynote : Rise of the FM Analyst

Matt Tucker, IFMA

Key takeaway: The FM Analyst = mindset. Six behavioral traits. Bibliometrics shows AI at the center of FM research. Governance distinguishes mature organizations from those still in transition.

Key insights:

- Europe and North America: high maturity but legacy lock-in
- Middle East: fastest growth but capacity gap
- Africa predicted as fastest future FM market

Data: 37 interviews · 1,800 papers · 68 keywords (vs 48 two years ago)

> *"The property and construction industry is notorious for being a laggard behind every type of technology." : Matt Tucker*

SECTION D · CLOSING

And now, what do we do?

10 concrete actions classified by decision-maker profile. From trend to decision.

SECTION D · CLOSING

10 concrete actions for Monday morning

This event doesn't boil down to trends. It translates into decisions. Here are ten concrete actions classified by decision-maker profile.

For FM / Operations Directors

1 **Map your data sources. All of them.** Before talking about AI, list every system, every "rogue" Excel spreadsheet. Identify the 2 core systems to connect as a priority.

2 **Demand data ownership in every outsourcing contract.** Data ownership clause, minimum quality, and export. When the provider leaves, your data stays.

3 **Launch an acoustic audit of your spaces.** Use Ecophon's free ISO calculator. Identify the three most problematic zones and test reactive soundscaping as a pilot.

For CIOs / IT Workplace

4 **Assess your digital twin maturity.** Five levels. If you're at level 1 or 2, the goal is not level 5. It's to move up one notch.

5 **Pilot an AI agent on a specific use case.** Not a global AI strategy. A single problem. Ticket sorting or room booking via conversational agent. Measure. Iterate.

For CRE / Real Estate Directors

6 **Assess your embodied carbon exposure (scope 3).** 76% of emissions are scope 3. If you only measure scope 1-2, you're only seeing a quarter of the problem.

7 **Integrate circular requirements in your next RFPs.** Start with a single flow and require full lifecycle traceability.

For CHROs / Chief People Officers

8 **Stop debating the number of days.** Train your leaders in the difficult hybrid conversation: why does presence create value? When? For whom? Align them with each other first.

9 **Invest 40+ hours of AI training per employee.** Below that, departure for salary. Above, departure for development. Training alone is not enough: you need a complete employer proposition.

For Consultants / Designers / Workplace Strategists

10 **Develop your storytelling and business translation capacity.** The FM Analyst doesn't need advanced statistics. They need to translate a sensor data point into an argument the CFO understands.

OSOL INSIGHT

What these trends mean for energy in your spaces.

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Osol has developed the first self-service smart battery network for workplaces. Made in Europe, present in 15 countries, deployed at 120+ international companies. Recipient of multiple Workplace awards and selected among Solar Impulse solutions.

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Sedus is a German manufacturer of furniture and workplace solutions, owned by two foundations. With over 150 years of innovation in ergonomics and design, the company helps organizations create high-performing, healthy, and sustainable workplaces. → sedus.com

ABOUT OFFICE ET CULTURE

Office et Culture is an independent review analyzing workplace transformations and their impact on spaces. At the crossroads of architecture, usage patterns, and work cultures, the review provides key insights for businesses, designers, and workplace stakeholders to imagine more relevant and sustainable work environments. → officeetculture.fr

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