

BEYOND PRESENCE

2026 HYBRID WORKING REPORT



Designing
Collective Performance
in the Hybrid & AI Era

AREMIS

IN CLOSE SYNERGY WITH URBANITE ADVISORS

“Presence is a lever, not a strategy”



AI is transforming individual productivity...

Hybrid work has expanded individual autonomy...

But the model for **collective performance** remains largely undesigned.

Why Read This Report?

- **Data-based insights** – grounded in cross-sector observations.
- **Operational perspectives** – highlighting levers to improve efficiency.
- **Market benchmarks** – providing a broader perspective.
- **Guidance for Structuring Hybrid Work Systems** – move from presence management to performance design.

This 2026 edition aims to provide clearer **guidance for structuring hybrid work** in a more intentional and performance-oriented way.

Xavier Orts, CEO AREMIS Group

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140

Enterprises across EMEA

1,2M

Represented occupants

53%

Average declared presence

01 Our dataset

02 Key findings

03 Observations: presence as performance metric

04 Alternative: organise for presence

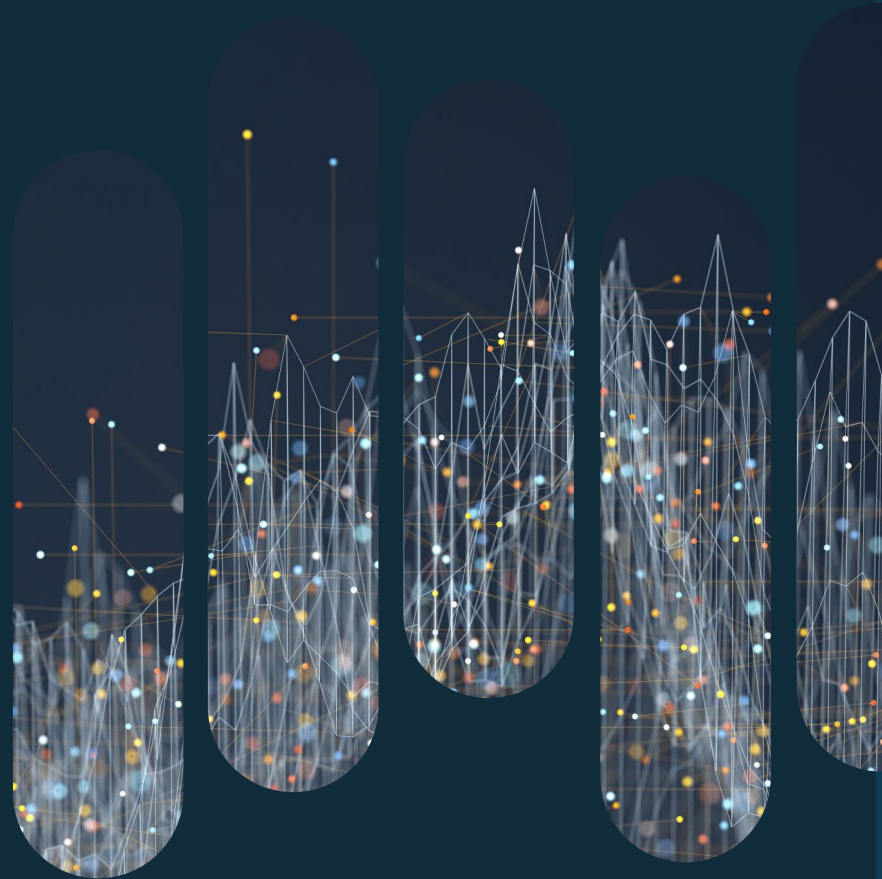
05 Impact: design for collective performance

SECTION

01

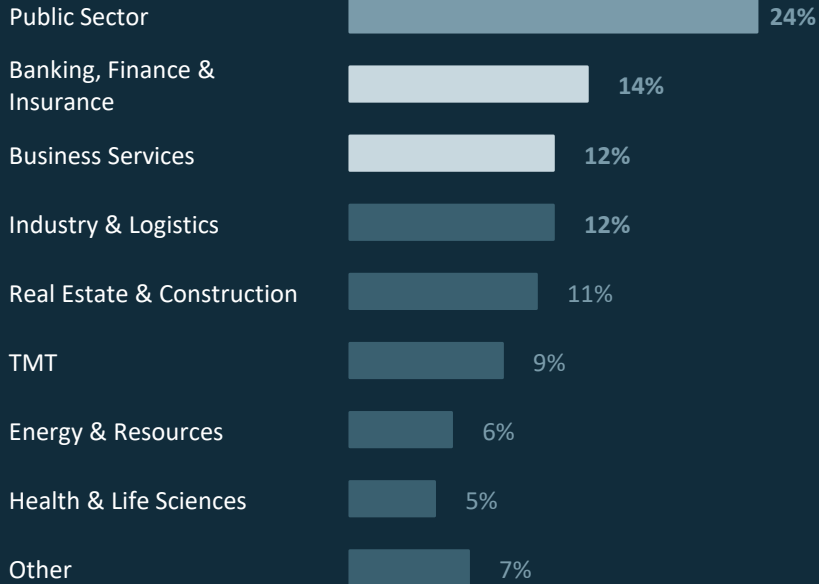
Our dataset

Who responded



140 companies across EMEA representing 1.2 million office workers.
Median company size: 2,700 employees.

BREAKDOWN BY SECTOR



BREAKDOWN BY SIZE



SECTION

02

Key findings

What has changed, what has not



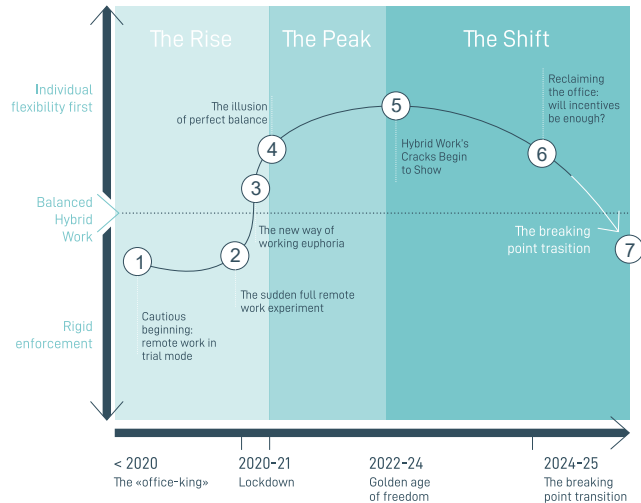
2025 Conclusions.

The emerging screw tightening phase

Last year, we observed a structural shift:

- Leadership fatigue was rising
- Hybrid expectations were colliding
- Policies were tightening

We identified the emergence of a **Screw Tightening** phase.



One Year Later

What has actually happened

01 Tightening is confirmed

Attendance requirements and measurement remain central governance levers. Hybrid work continues to be governed primarily through attendance requirements and monitoring.

02 Requirements influence presence — but do not determine it

Similar formal requirements lead to very different occupancy outcomes.

Attendance remains only partially correlated with mandated days, highlighting the role of culture, management practices and the perceived value of being on-site.

03 Presence is not performance

In many organisations, employees still self-organise without explicit shared frameworks. Hybrid work therefore remains largely driven by individual autonomy rather than structured coordination.

04 What is easiest to steer tends to dominate

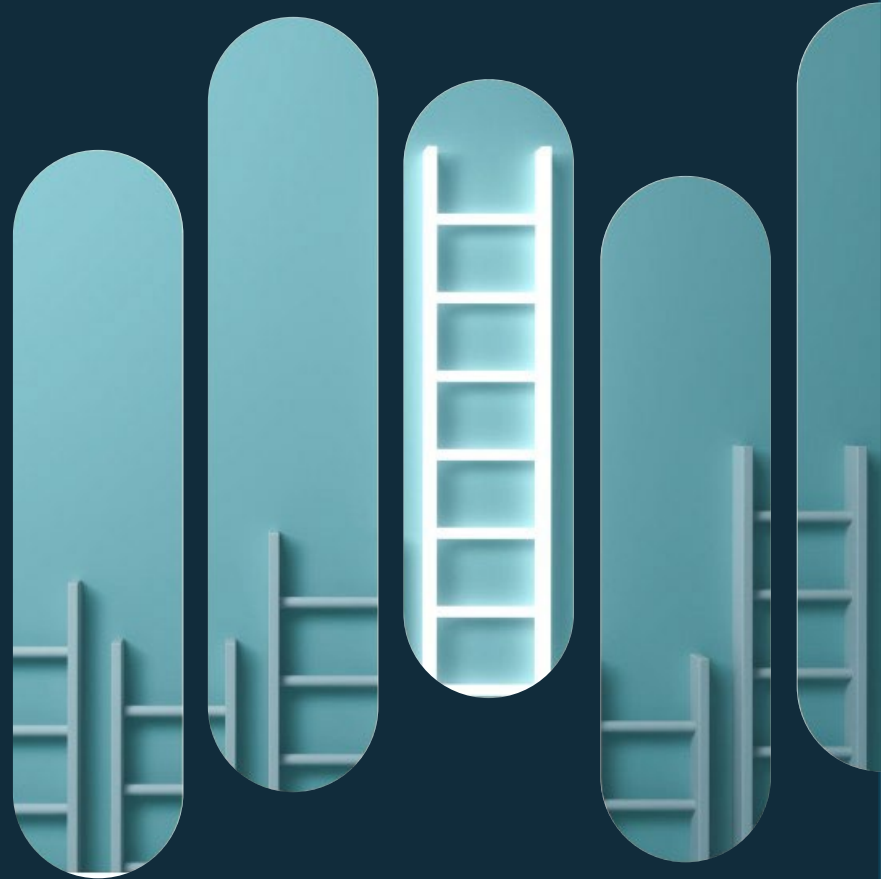
Occupancy, desk ratios and cost are actively managed. Attendance is operational and comparable. Collective performance, however, depends on more complex mechanisms — coordination quality, synchronisation of presence and learning dynamics. Presence can support these mechanisms, but does not automatically produce them — particularly in organisations operating across multiple sites and geographies.

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03

Observations

The limits of a presence-driven focus



Attracting people to the office

Remains the top priority

2024

1. Space & desk sharing / re-organisation
2. Attracting people to office / Office experience
3. Organisation & Change Management

2026

1. Attracting people to office / Office experience
2. Data & Tools
3. Space & desk sharing / reorganisation



2025

1. Attracting people to office / Office experience
2. Space & desk sharing / reorganisation
3. Organisation & Change Management

Conclusion

For the second consecutive year, attracting people to the office ranks as the primary challenge.

This persistence may indicate that organisations are still focusing on presence as a visible lever of action.

It may also suggest that many have not yet translated hybrid work into clear, shared operating frameworks — such as explicit team agreements — that structure how collective work is organised beyond attendance.

Policies influence presence...

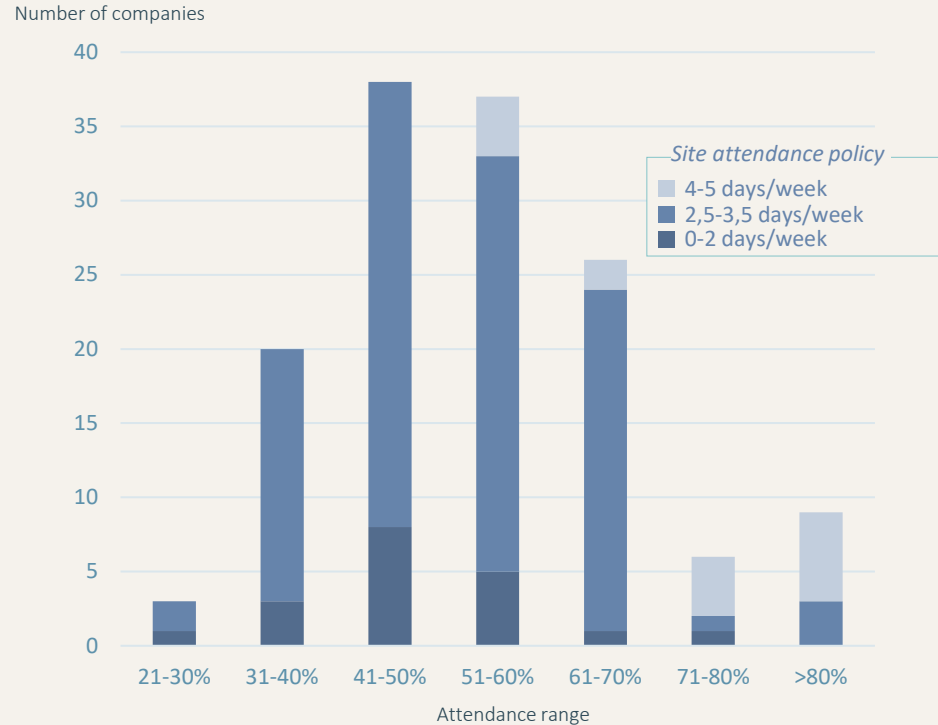
But do not determine it

Mandating presence increases attendance but does not guarantee high or homogeneous on-site rates.

Collective behaviour remains partially decoupled from formal requirements :

- Some organisations with 2.5–3.5 mandatory days remain in the 41–50% attendance range.
- Others with low formal requirements exceed 50% attendance.
- Even strong mandates (4+ days) do not systematically result in attendance rates above 80%.

This suggests that while formal requirements influence presence, **actual attendance levels are shaped by broader organisational dynamics — including culture, managerial practices and the perceived value of being on-site.**



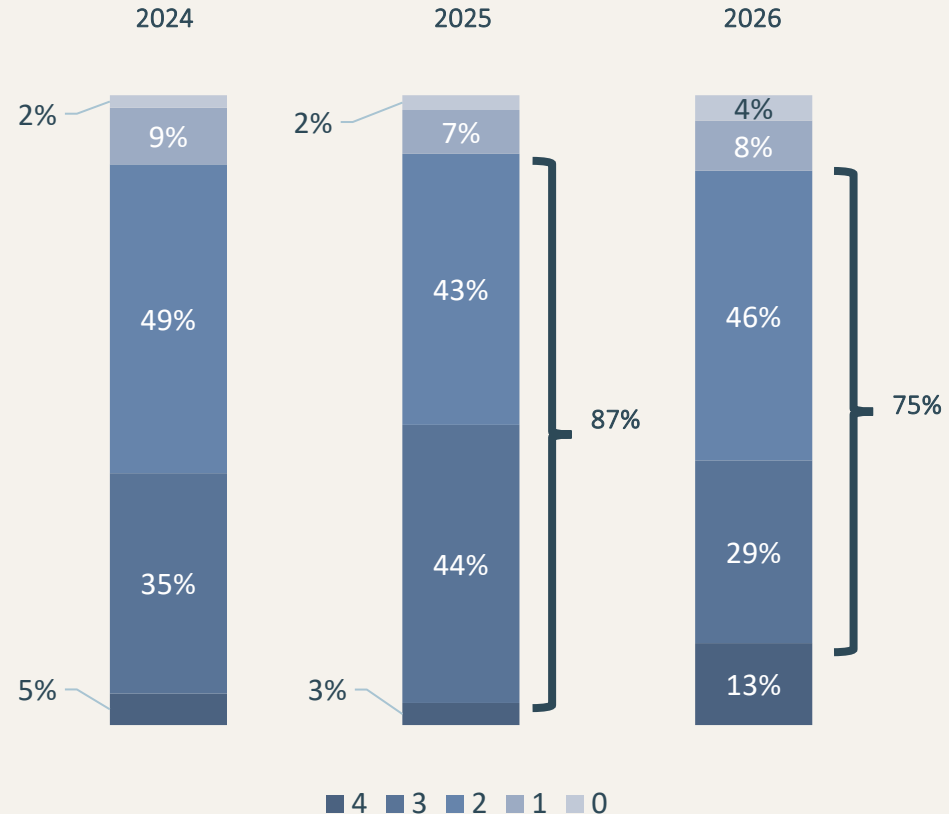
Actual attendance vs formal on-site requirements

Policies adjust

The model remains the same

- **98%** of companies have set **remote working policies** (in **75%** of the cases for **2 or 3 days** per week)
- The average number of **remote work days allowed** is **2.5 per week** (vs. 2.4 last year).
- Yet, hybrid work is becoming more polarised, with more organisations following moving toward extreme configurations.

This polarisation may reflect different strategic priorities: some organisations prioritise **real estate rationalisation through higher remote work**, while others seek greater **on-site presence to reinforce collective dynamics**.

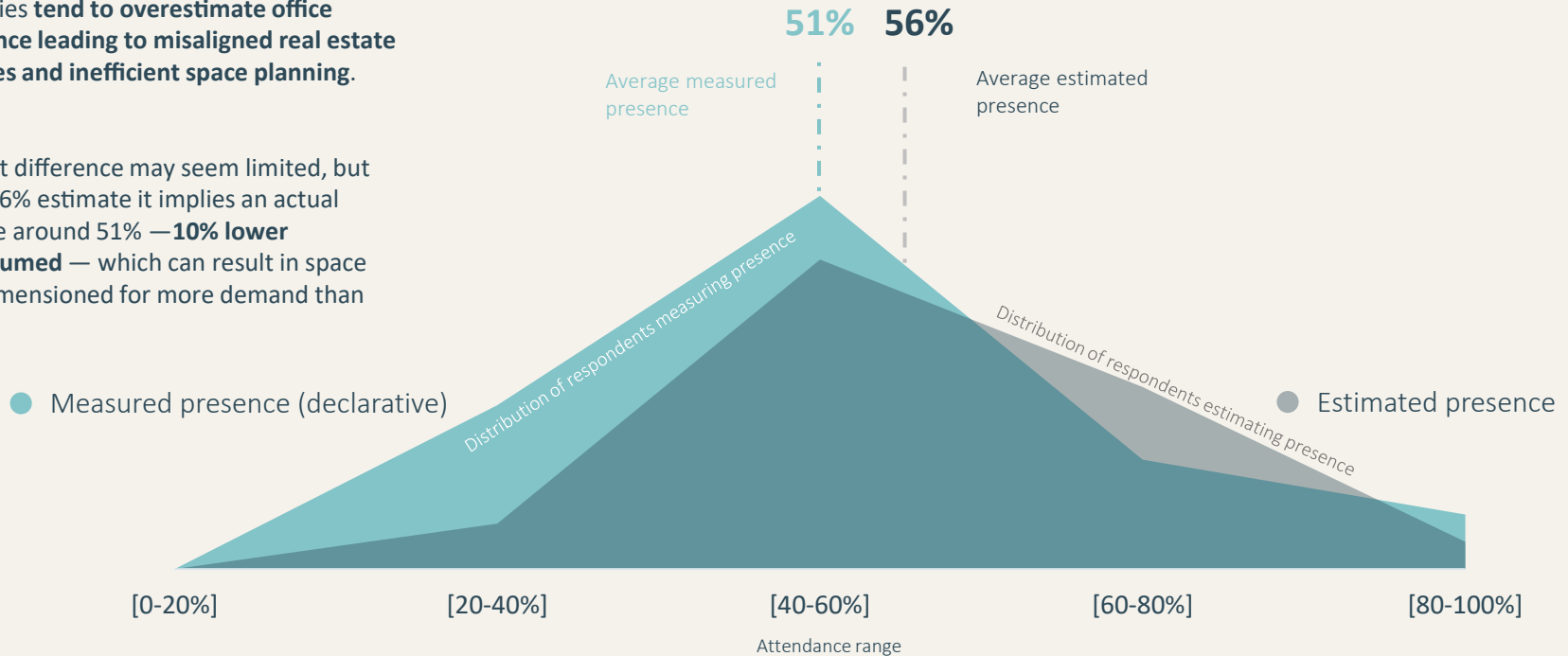


Attendance Assumptions

May lead to approximative Real Estate decisions

Companies **tend to overestimate office attendance leading to misaligned real estate strategies and inefficient space planning.**

A 5-point difference may seem limited, but from a 56% estimate it implies an actual presence around 51% — **10% lower than assumed** — which can result in space being dimensioned for more demand than needed.

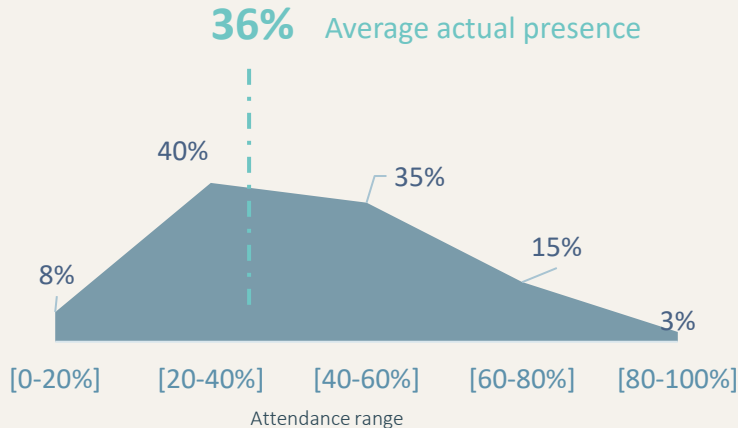


Declared versus Actual Measures

Insights from 4 directly monitored assets (48 tenants)

Beyond survey perceptions, **we looked at real occupancy data** from four office buildings (including three multi-tenant assets) under our direct measurement mandate — three in Brussels, one in Paris.

The declared average attendance ($\approx 51\%$) observed across the study sample remains notably higher than the measured figure (36%) recorded in the four directly monitored buildings.



Asset	Location	Surface	Tenants	Average daily attendance	Positioning
A	Brussels (City center)	18,000 m ²	10	250	Prime asset with extensive on-site services
B	Brussels (East)	18,000 m ²	13	230	Office building with limited on-site services
C	Brussels	52,000 m ²	1	1550	HQ of healthcare production
D	PARIS (CBD) QCA	47,000 m ²	24	1515	Prime asset with extensive on-site services

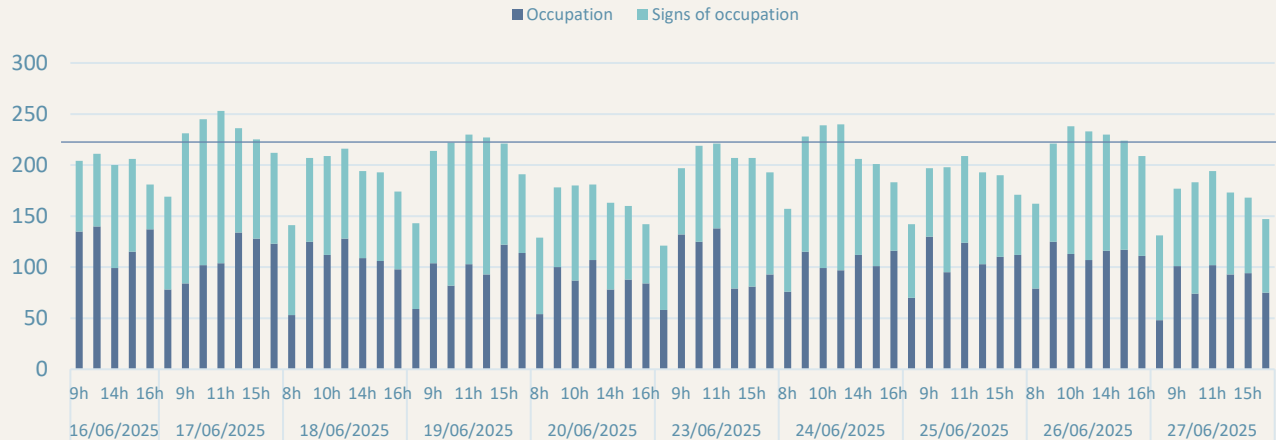
Nevertheless, it is striking that factual measurements consistently appear lower than declared attendance levels. This recurring gap suggests that perception effects, estimation bias or methodological differences systematically influence how presence is assessed.

When perception and measurement diverge

Surveying reality

In a Geneva office building, following **repeated complaints of office overcrowding**, we conducted a physical headcount (June 2025).

A low average occupancy (37%) did not prevent employees from perceiving congestion. Not overall capacity, but **uneven distribution** of presence and **limited clean desk practices**.



Measured reality

37% Average occupancy

Approx. 1/3 occupied, 2/3 available

Perception

Feeling of saturation
No available desks

Root Causes

Limited clean desk practices
Poor distribution of presence

Understanding on-site presence

A dominant metric with different implementations

Key trends

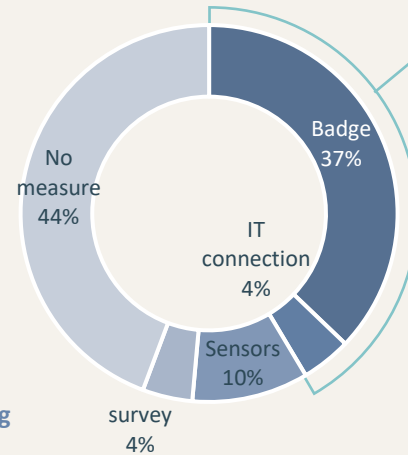
56% (vs 60% last year)

of companies measure on-site attendance

36% (was 33% last year)

of companies measure meeting room usage

Occupancy measurement practices remain broadly stable compared to last year. While more than half of organisations measure attendance, only a minority track meeting room usage in a structured way. Measurement is becoming standard practice.



2/3 of the measure is made by readily available information

Additional Monitoring Technology
In 1/3 of the cases

Data maturity increases with scale

Site presence accuracy in function of company size

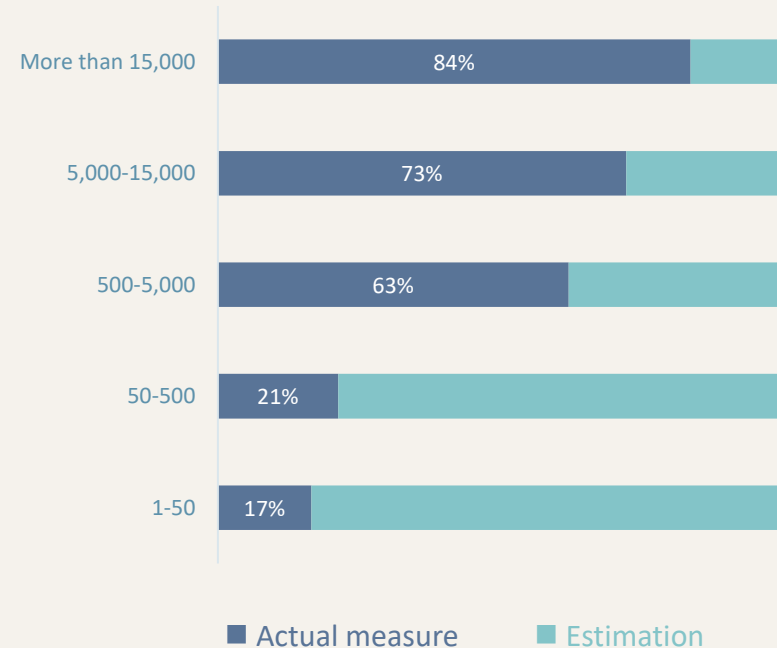
The likelihood of measuring actual attendance increases significantly with organisational size.

Smaller organisations rely more frequently on estimation, while larger ones are more likely to use structured measurement tools.

Attendance is a clear and operational indicator — relatively simple to collect and compare.

However, collective performance depends on additional dimensions that are inherently more complex to observe and quantify: coordination quality, synchronisation of presence, interaction density, and learning dynamics.

The challenge is therefore not only to measure presence, but to determine which indicators are truly meaningful for steering collective performance.



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04

Alternative

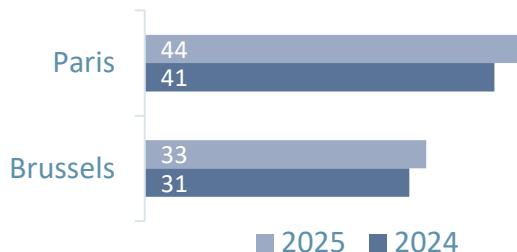
What if the problem was less the number of people present, but rather how presence is organised ?



Collective dynamics

Beyond average attendance

In our measured assets, the average presence tells only part of the story



Average presence remain an incomplete indicator. What ultimately matters is the number of days spent within the “**Social Capital Activation Zone**” — an empirically observed occupancy range between 65–85% of capacity.

Below this range, interaction density is too low to create vibrancy. Above it, congestion reduces collective efficiency.

01 Measuring attendance

Measured attendance increased slightly overall (+2 points), with a stronger progression in Paris (+3 points).

02 Formal requirements = guarantee to success ?

Similar formal requirements lead to very different occupancy outcomes. Attendance remains only partially correlated with mandated days, highlighting the role of culture, management practices and the perceived value of being on-site.

03 Presence is not collective performance

Looking at the Paris building at an aggregate level — independently of tenant continuity — overall occupancy has risen by close to 10%. This broader increase indicates that prime locations may attract organisations with stronger on-site dynamics, or create conditions more conducive to presence.

04 Organise for a qualitative presence when it matters

The challenge is therefore not to maximise average attendance, but to organise presence so that each organisation — and each team — maximises the number of days spent within this “**Social Capital Activation Zone**”.

Hybrid policies are differentiated

But are they coherent?

Heterogeneity of hybrid working policies

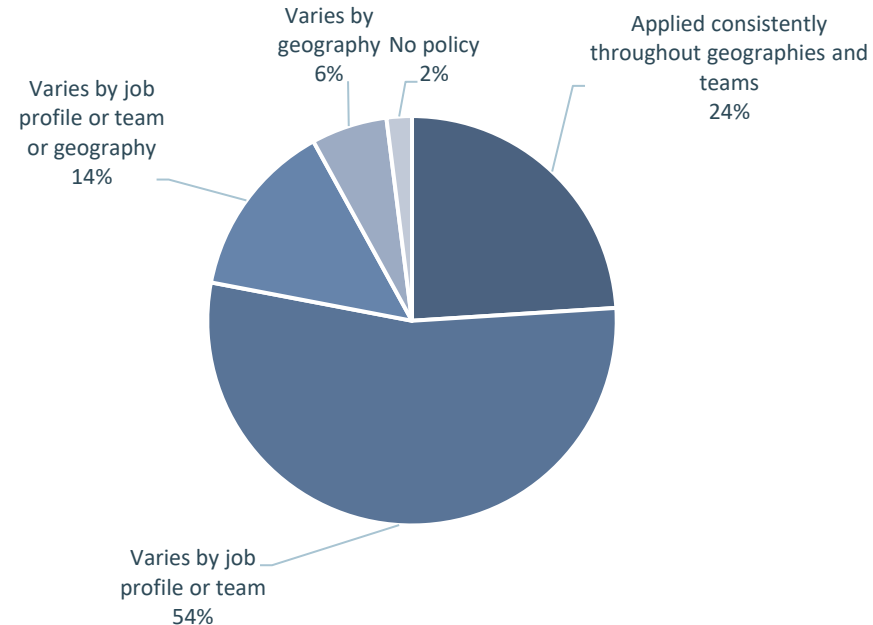
The predominance of differentiated policies may reflect organisational heterogeneity and operational pragmatism. Within the same organisation, certain activities require regular client interaction, access to specific equipment, or compliance with regulatory constraints, while others operate largely digitally or across time zones. These operational differences can legitimately justify differentiated hybrid policies.

Restore clarity and symbolic fairness.

However, differentiation becomes problematic when it lacks explicit shared principles. Without a clear rationale, differences in treatment can be difficult to explain internally, potentially weakening perceived fairness and collective coherence.

Clarity over complexity

In this context, the adoption of a uniform rule may emerge as a governance shortcut. A single company-wide standard can restore clarity and symbolic fairness, reducing internal debate. Yet, it may also signal a reluctance to engage with the structural complexity of hybrid work.



Decision Making

Remains largely individual

The 2025 tightening may have reflected an attempt to reassert control.

The 2026 figures suggest a stabilisation around **high autonomy**.

In 2026, 67% of office days are still decided by employees — predominantly “with coordination.”

Hybrid work therefore continues to rely largely on individual autonomy.

Yet the nature of this coordination remains unclear:
does it reflect shared, team-level agreements* —
or does it simply mean informing others of one’s schedule?

Coordinate through a team Agreement ?

A team agreement is a formal shared document that sets clear expectations on when and how teams work together. It ensures alignment on office days, collaboration, tools and decision-making.



Technology

Underused for supporting the collective performance

Technologies are primarily used to declare attendance and manage space logistics.

Their role in supporting team-level coordination remains limited, with few organisations using them to organise rotations or gain visibility on collective presence.



User experience

Is measured ... but is it managed?

The user experience is now measured by 80 % of companies, last year it was only made by 46 % of them.

In **95%** of the cases, companies measure user experience at least **once a year** (last year it was 91%)

In the vast majority (83%), it is a custom-made survey on internal channels

80%

of companies now measure
user experience
(was 46% last year)

95%

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83%

use a custom-made survey
on internal channels

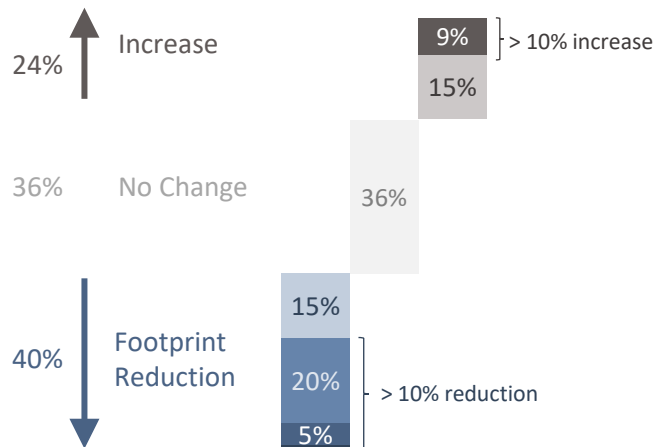
A dimly lit office dining area with people at tables and a large spherical light fixture.

If collective performance depends on coordination, are current optimisation efforts aligned with that objective?

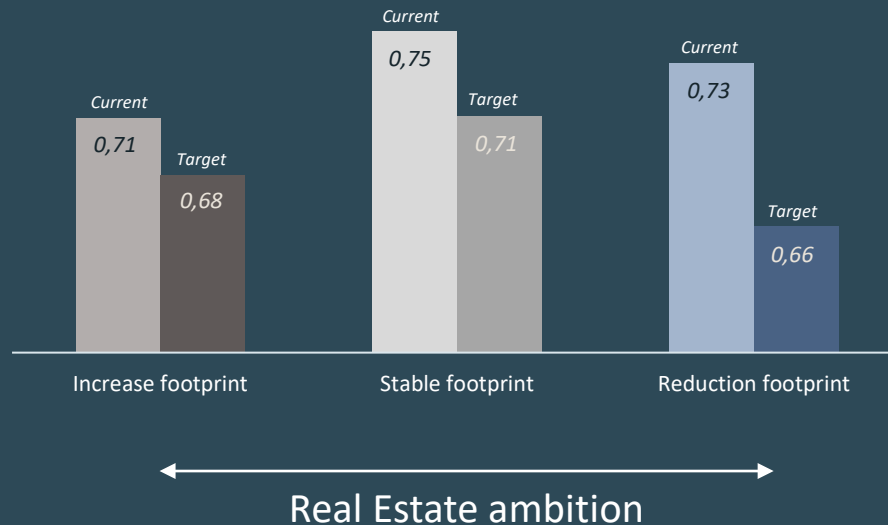
Portfolio adjustment

A key strategic lever

Often the first strategy is to work at the supply side and optimisations are first-of-all taught from a cost performance perspective.



Willingness to increase **sharing ratio** in line with the portfolio strategy :



Real estate adjustment continues to be a central strategic lever. A majority of organisations aim to increase desk sharing. Even among stable or expanding footprints, optimisation remains a priority.

FORMAL ASSIGNMENT OF A DESK?

42%

No formal assignment

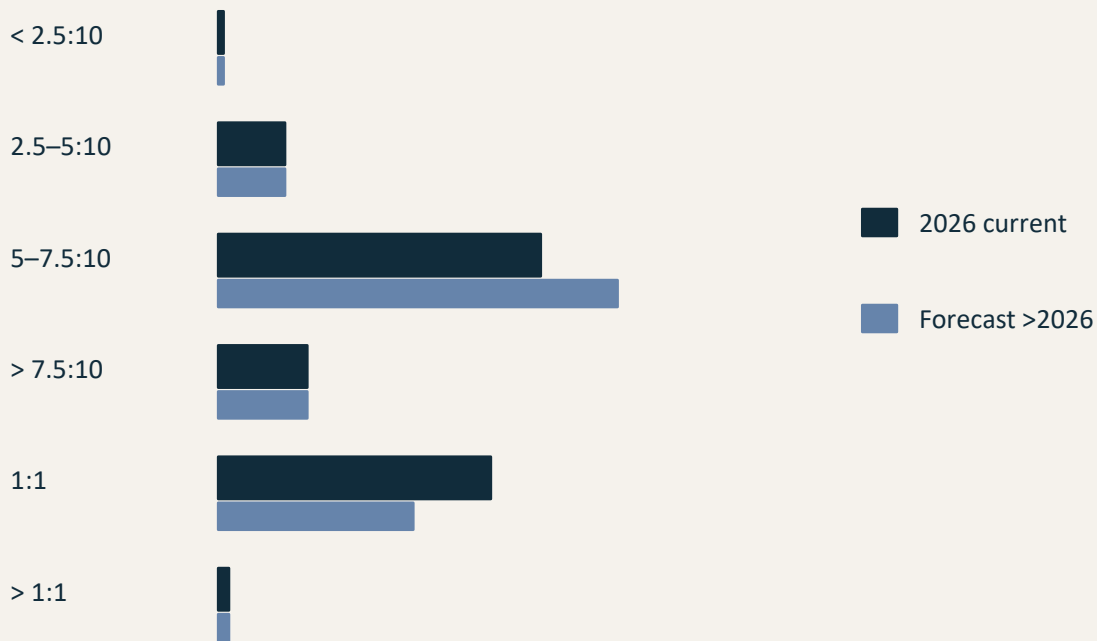
30%

Yes, formal assignment

28%

A mix of both

SHARING RATIO DISTRIBUTION



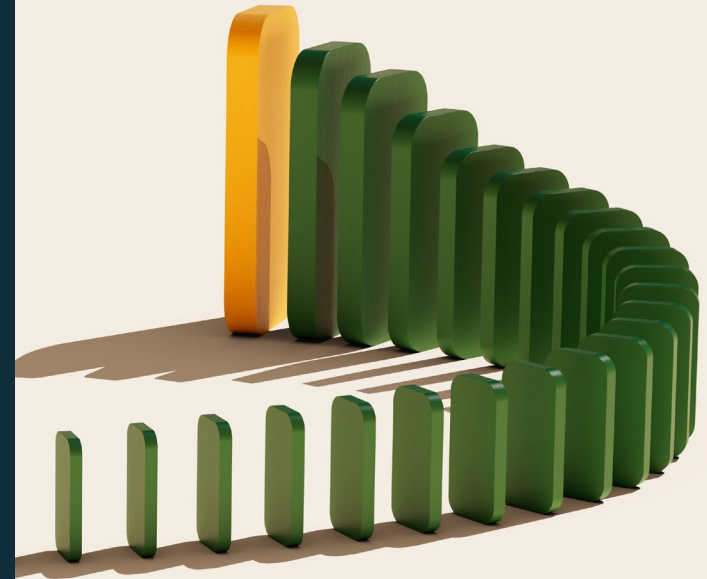
AVERAGE 7.3 desks : 10 employees | TARGET 6.8 : 10

SECTION

05

Impact

While real estate optimisation remains a powerful lever, it does not by itself address the broader question of how hybrid work supports collective performance.



The real challenge

The hybrid model remains in transition

Only one organisation in three combines **maturity and stability** in its hybrid model.

Two thirds remain in **transition**. They describe themselves as consolidating, evaluating or re-evaluating their approach to hybrid work, and/or report that on-site presence has recently been tightened, encouraged more strongly, or remains under discussion.

This indicates that, for a majority of organisations, hybrid governance has not yet reached structural equilibrium. Despite several years of adjustments, optimisation efforts and policy refinements, the model remains in transition rather than fully stabilised.

Hybrid work is therefore not yet a settled operating model in most organisations — it is still being shaped, negotiated and recalibrated.



66%

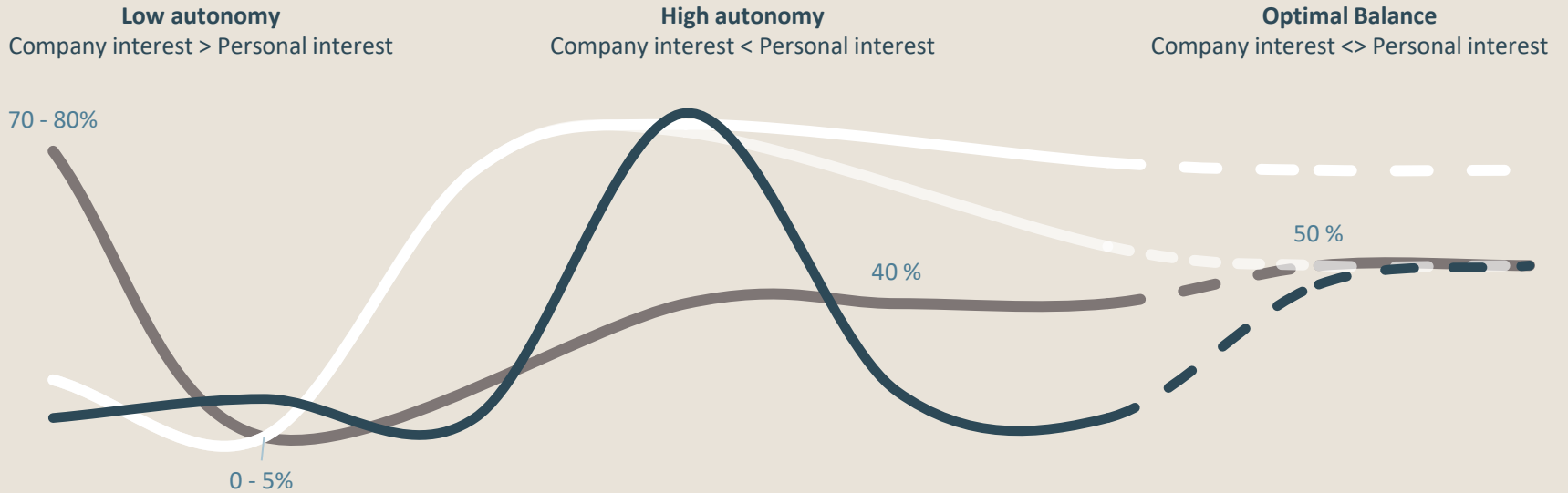
Still in transition
(no maturity or stability)



34%

Mature & stable
hybrid model

Where are we now ?



Pre-Covid	Covid Lockdown	Back on Site	Screw Tightening	Next Years
Attendance 70-80%	Attendance 5%	Attendance 30-40%	Attendance 40%	Attendance 50%
Self-management Low	Self-management Medium-High	Self-management Very High	Self-management High	Self-management High-Medium
User support Low	User support Low	User support Very High	User support Low	User support Medium

What we are trying to solve

01 Self-management remains structurally high

Despite renewed mandates and stronger presence expectations, office occupancy has stabilised rather than significantly increased.

02 The system remains unbalanced

Presence is encouraged, but collective coordination remains under-designed. The debate continues to focus on 'how many days' rather than 'how we work together.'

03 Artificial Intelligence intensifies this tension

It reinforces individual autonomy — employees increasingly turn to AI rather than colleagues for answers — while requiring stronger collective learning to unlock its full value.

04 Organisational performance depends on collective surplus value

Value that emerges beyond individual productivity. In a hybrid and AI-augmented world, this will not emerge by default. It must be intentionally designed.



From fragmentation

Towards a coherent system design

Managing the conditions for collective performance

Organisational performance depends on the **organisation's ability to create fluid working conditions** — where coordination is simple, interactions are natural, and the office genuinely serves collective work.

In a hybrid context, these conditions **no longer emerge by default**. They must be intentionally managed, actively maintained, and continuously refined.

Hybrid work is not a policy topic — it is a holistic workplace system

Hybrid work cannot be managed through isolated lenses — real estate, HR or IT taken separately.

- A real estate view optimises space, but not collective performance.
- An HR view defines rules, but not coordination in practice.
- An IT view equips tools, but not shared ways of working.

Performance emerges from their articulation as a coherent system.

3 axes to work on

01 Organisational

- Map core collaboration patterns (decision-making, project work, knowledge sharing).
- Identify coordination pain points in hybrid contexts.
- Define collective performance objectives (speed of decision, innovation, knowledge flow).
- Establish a cross-functional governance (HR + IT + Real Estate + Business).

02 Physical

- Assess office usage patterns vs. intended purpose.
- Map spaces against types of collective activities (focus / co-creation / decision / socialisation).
- Identify space friction: lack of project rooms, hybrid meeting rooms, etc.

03 Digital

- Audit collaboration tools and practices.
- Map communication flows (meetings, async work, document collaboration).
- Identify tool fragmentation and overload.
- Map lack of process support

Designing Hybrid as a Performance System

Hybrid work will not stabilise through policy adjustments alone. It requires deliberate system-level decisions.

 01

Make the Office a Collective Performance Asset

Clarify the explicit role of the office: coordination, informal interactions, learning, culture. Move from 'place of presence' to 'support for collective value'.

 02

Establish a Federating Framework and Integrated governance

Define clear shared principles: what requires presence, what does not, how flexibility operates. Align consistency and local adaptation to reduce organisational uncertainty.

 03

Embed the Framework into Practices and Management

Translate principles into concrete team-level mechanisms: team agreements, shared rituals, coordination norms, decision rules. Equip managers to sustain alignment in daily work.

 04

Equip and Steer the Model Over Time

Use data and digital tools not for control, but to monitor usage, reduce friction, arbitrate investments and adjust the model sustainably.

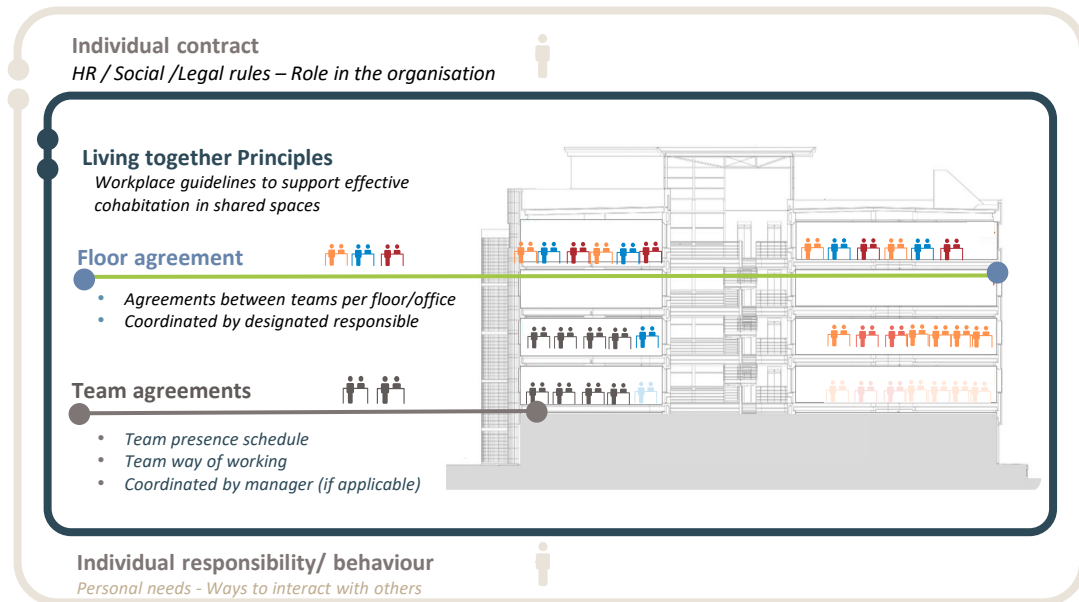
Making the System Operational

A team agreement makes explicit:

- The role of the office in the team's performance
- When physical presence creates value (coordination, learning, decisions)
- How remote and digital work are organised
- How decisions are made and priorities synchronised
- How responsibilities are shared over time

Operational Guidelines

A team agreement is not a scheduling tool. It is a formal, shared framework that makes collective work explicit in a distributed environment.



Thank you.

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