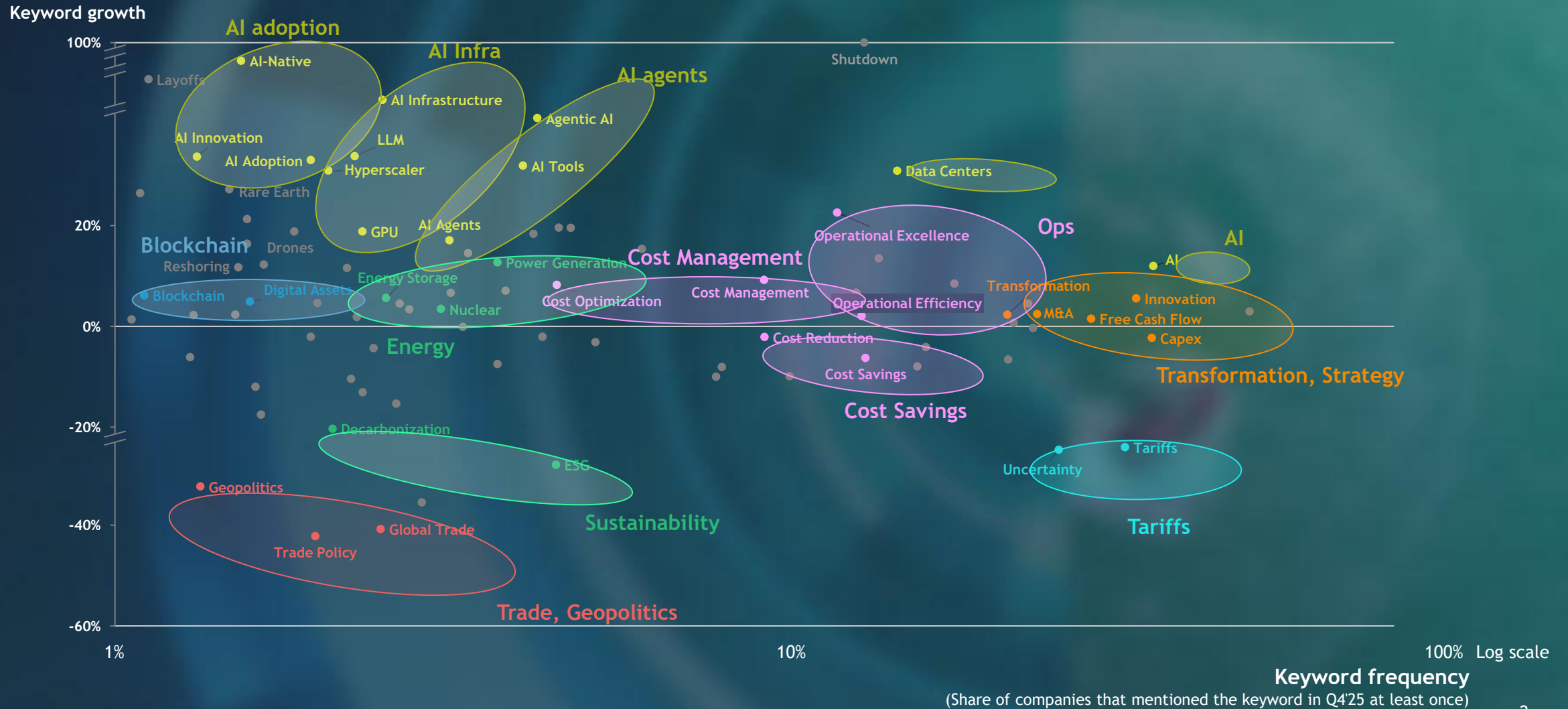


# Value realization from AI & Tech, and implications for future workplaces

Odd Arne Sjøtil,  
Boston Consulting Group

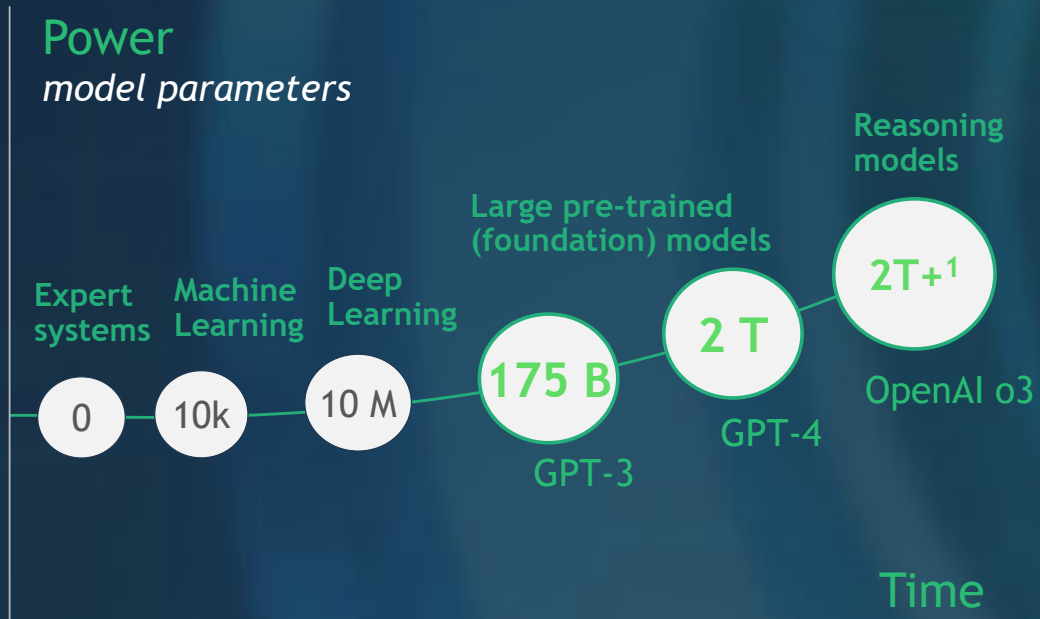
March 26, 2026

# AI is a top priority for CEOs worldwide

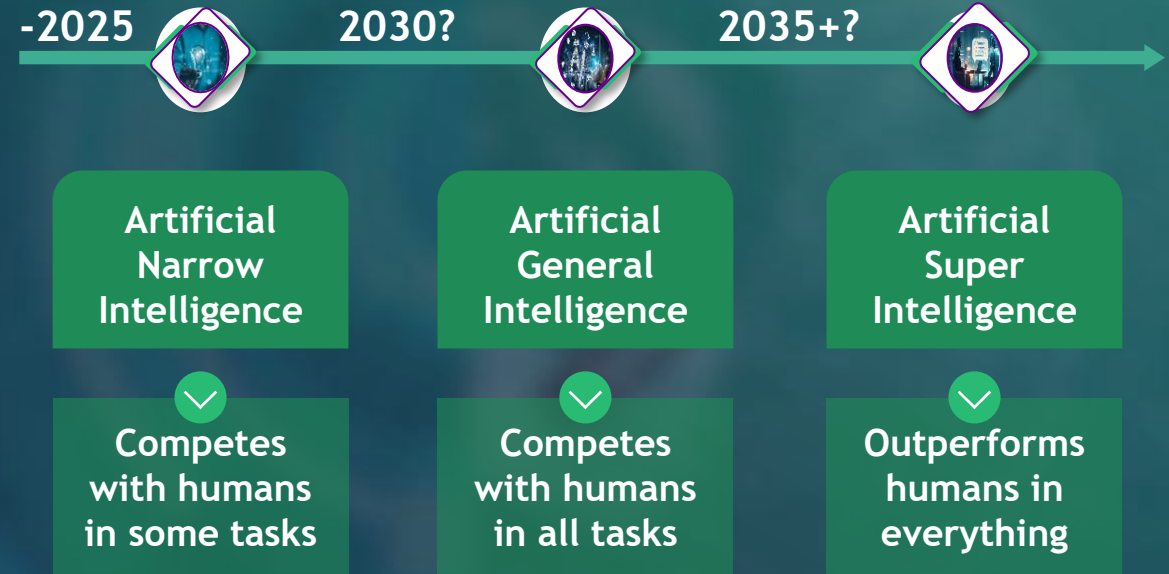


# Rapid development of the technology

The power of the technology will grow...



... and rapidly unlock completely new capabilities



# Examples of AI disruption: Workforce efficiency

Selected examples



Customer support workforce cut by ~40-50%; replaced by AI agents

**Klarna**

Cutting workforce by ~40%; Chatbot handles most customer service interactions



~30% reduction in workforce - leverage AI for coding & support automation



Aiming for 30% of support functions FTEs replaced by AI and automation

# Examples of AI disruption: GenAI in ERP programs

Significant investments...



Global market size for ERP programs (2025)

... and impact from AI...



Reduction in capacity needed for an ERP program - if AI is applied

...already happening



LTM<sup>1</sup> Stock value drop in IT service companies



# Examples of AI disruption: Business model innovation

Selected examples



## Biopharma

Early signs of disruptive impact



Significantly greater speed to market by reducing product discovery timelines



## Software

Lowering barriers to entry for software development by allowing natural language inputs



## Supply chain

Reinventing planning, production, and logistics through AI-driven automation and prediction

Example disruptors



Cradle

absci



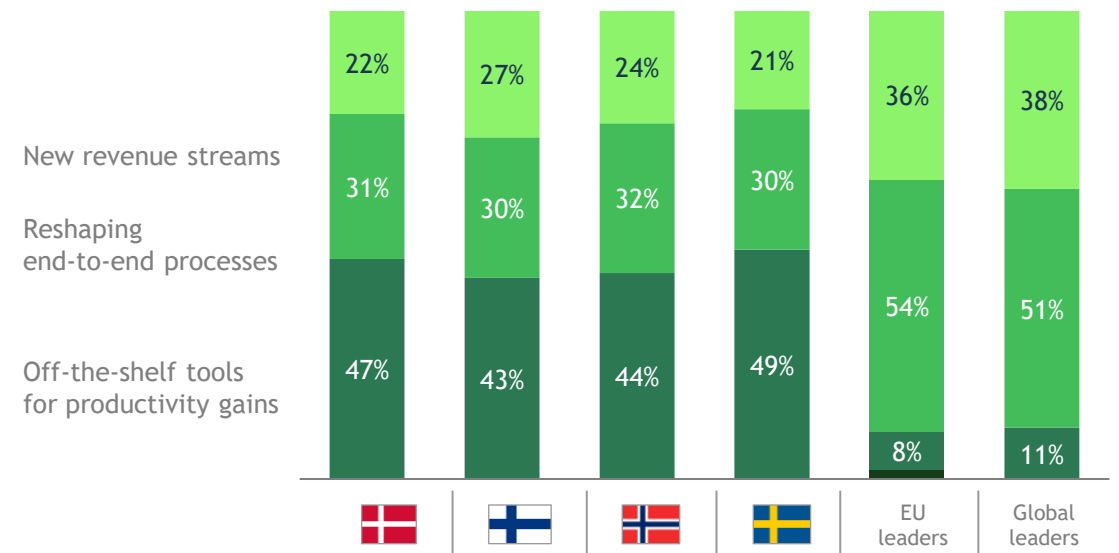
BlueYonder

Optilon

# However, most companies are yet to see material impact from AI

- > **AI is 'universal':** 99% of companies globally leverage AI
- > **Limited value realization:** Only 4% of Nordic companies see >5x ROI from AI investments
- > **Higher expectations in Nordics:** ~3x higher value expectations than EU competitors

## Nordics are overinvesting in off the shelf productivity tools vs. EU and globally



# What does it take to succeed?

# Making it all the way to money maker



## 1. ILLUSIONIST

**(Gen)AI**  
(model, data science)

No value



Self-assessment  
selected clients<sup>1</sup>

0%

## 2. THEORIST

**Scale enablers**  
(risk, quality & infrastructure)

**(Gen)AI**  
(model, data science)

No value



27%

## 3. SHOWMAN

**Process redesign**  
(operational excellence & automation)

**People adoption**  
(upskilling adoption & proficiency)

**Scale enablers**  
(risk, quality & infrastructure)

**(Gen)AI**  
(model, data science)

No value



59%

## 4. MONEY MAKER

**Execution to P&L**  
(incl. value tracking & safeguarding)

**Operating model**  
(redesign, adaptation & workers council)

**Process redesign**  
(operational excellence & automation)

**People adoption**  
(upskilling adoption & proficiency)

**Scale enablers**  
(risk, quality & infrastructure)

**(Gen)AI**  
(model, data science)

EBIT impact



14%

**Value Creation**

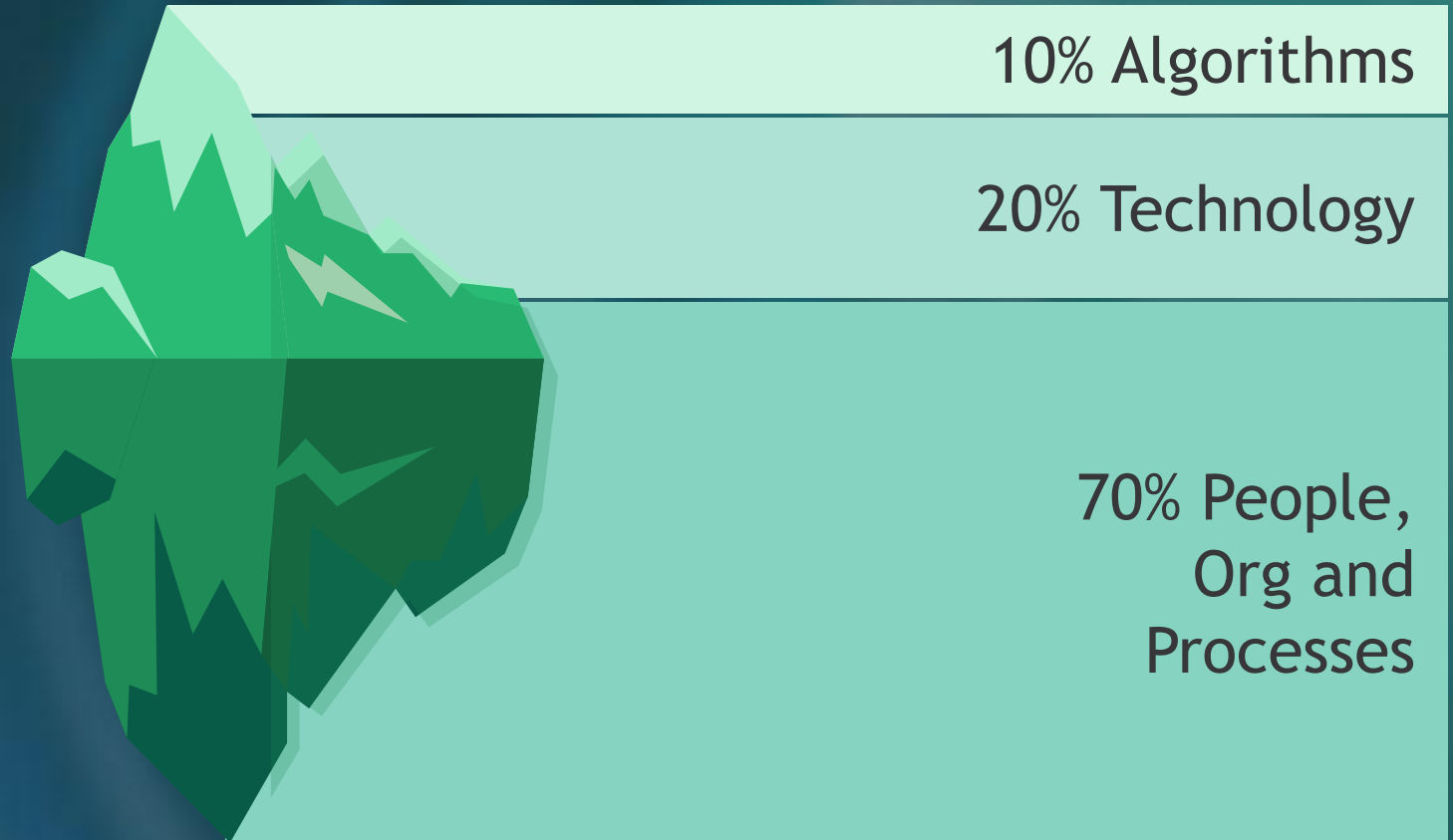
**Tech**

1. Survey conducted with the participants of the BCG (Gen)AI roundtable Source: BCG

# Reshape and reinvent to build competitive advantage



# The 10-20-70 rule of value realization



# Examples of value realization enabled by AI

**FOXCONN**

AI-enabled manufacturing optimization leveraging real-time production insights



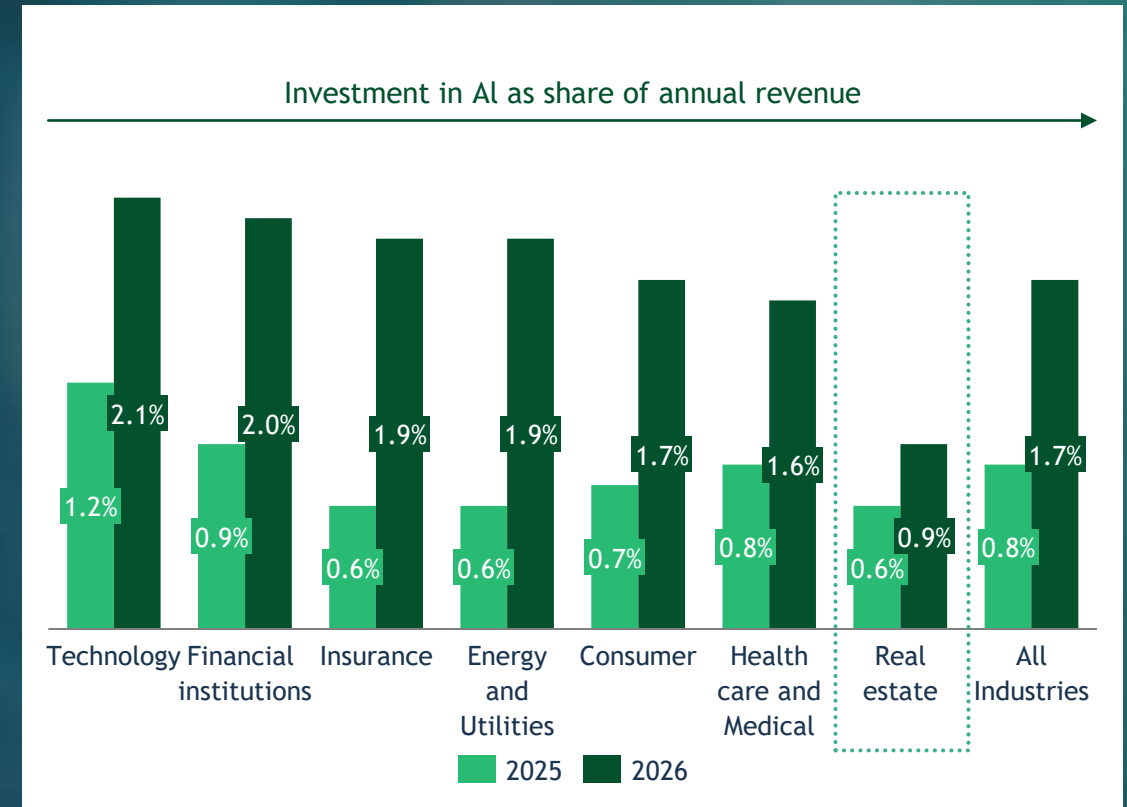
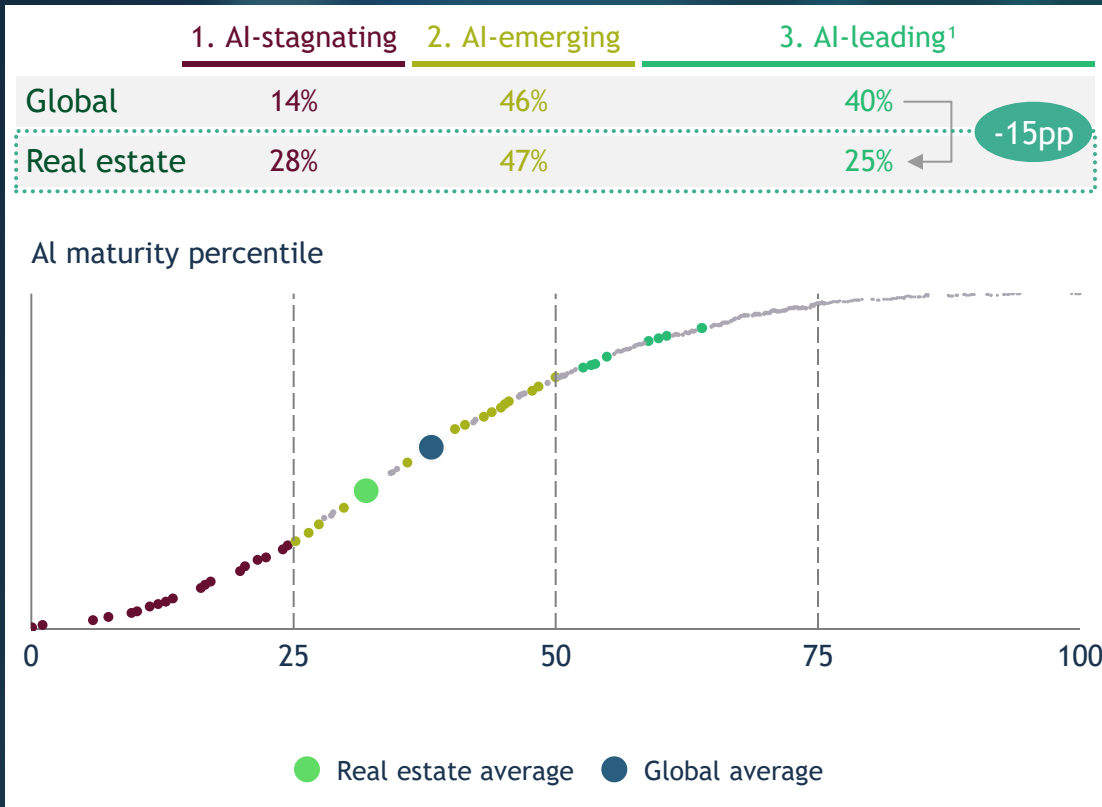
AI-driven sourcing, supplier intelligence & procurement decision optimization

What does this mean for Real Estate?

# Real Estate lag behind on AI maturity and investment level

**Lower maturity:** Real Estate lags the global average on AI maturity by ~15%

**Lower investments:** AI Real Estate investment 0.8pp below cross-industry average in 2026<sup>1</sup>



Source: BCG executive perspectives on Real Estate, March 2026

# Shifting market dynamics increases need for AI in Real Estate

## Operating margin pressure

→ Incr. value of faster capital deployment and higher productivity

## Structural labor shortage

→ Accelerating need for automation & tighter execution

## Rising market expectations

→ Making manual Real Estate Operating Model less competitive

# Significant value at stake for Real Estate across business models



Development companies



**400-700 bps margin uplift** through revenue growth and cost reduction



Investment Management



**+300-400 bps IRR** across the real estate investment lifecycle



Facility/Property Management (FM/PM)



**200-300 bps EBIT uplift** in the low margin FM/PM sector

# AI offers attractive opportunities for Construction players

## AI moves are coming

- **Efficient material allocation** through e.g. real-time demand forecasting
- **Procurement cost optimization** through advanced analytics

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- **Increased productivity** through automation and processes optimization
- **Reducing repetitive and admin tasks** through automation

---

- **Fundamental reinvention** of core processes (e.g., through generative design, collaboration platforms etc.)

## Examples



Claim Scout to cut costs and optimizing back-office processes



Transform the tender-to-proposal-workflow to increased conversion & decreased risk



Innovative collaboration platform

# Tenants will expect more from future workplaces with AI



## Flexibility & portfolio solutions

- Shorter leases, expansion/contraction options
- Preference for flexibility across multiple locations



## Data-enabled, high-performance buildings

- Demand for sensor-enabled, “smart” buildings, connectivity
- "Attractive" and collab. office environment to recruit talent



## Increased pressure on 'Value for money'

- Continued pressure on landlords to justify value per square meter
- Use of advanced analytics to optimize use of space

What should you  
take away from  
this session?

- AI is a top priority worldwide
- The technology is developing rapidly
- Few companies are making money from AI
- To succeed; value orientation, reshape/invent, 10/20/70
- Significant value at stake for Real Estate

The BCG logo is rendered in a bold, white, sans-serif font. The letters are closely spaced, with the 'C' and 'G' having a distinctive shape where the top and bottom curves are more pronounced. The logo is positioned on the left side of the image, set against a background of concentric, semi-transparent teal and blue circles that create a sense of depth and motion.

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