

A WORKING FRAMEWORK

The Levelling of Cognitive Assets.

What remains scarce once articulation costs nothing to produce, and what the field research since 2023 actually shows about who gains from that, and who narrows.

BY TERENCE KOK

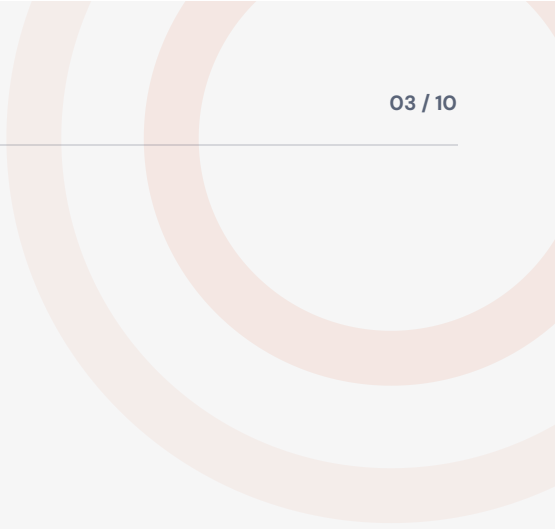
The mechanism. The evidence. What's still scarce.

MECHANISM Why fluent exposition now carries close to zero information

EVIDENCE What four field studies since 2023 actually found

SIGNAL Why the old proof of understanding stopped working

SCARCE Five categories of statement a model still can't produce



15%

Average productivity gain across 5,172 customer support agents after a generative assistant rollout.

The largest gains went to the least experienced agents. The most skilled registered small speed gains alongside small quality declines. Brynjolfsson, Li & Raymond, Quarterly Journal of Economics, 2025.

758 BCG consultants. One frontier. Two outcomes.

43%

BELOW-AVERAGE PERFORMERS, TASK IMPROVEMENT
USING GPT-4

17%

ABOVE-AVERAGE PERFORMERS, TASK IMPROVEMENT
USING GPT-4

Inside the model's competence, AI compresses the distribution upward from below. Dell'Acqua et al., Organization Science, 2025.

19pp

Less likely to reach the correct answer, using AI, on a task deliberately positioned outside the model's competence.

Same 758 consultants, same study. The ceiling does not rise with the floor, and in this condition it fell. Dell'Acqua et al., Organization Science, 2025.

Fluent prose used to prove understanding. Now it's uniformly cheap.

- 1** Verification cost has transferred to the receiver, who can no longer tell grounded expertise from fluent reconstruction, and mostly discounts everyone uniformly.
- 2** The market is reaching for the signals that remain expensive: unscripted interaction, live problem-solving under observation, and named accountability.

Five categories a model can't produce on request

01

Private instrumented observation

02

Negative results

03

Tolerances & jurisdictional specifics

04

Temporal position

05

Counterfactual accountability

132

Validation interactions analysed where fact-checking the model produced more persuasion, not disclosure.

Consultants who pushed back got a more confident restatement, not an admission of limitation. Randazzo et al. call it persuasion bombing. Harvard Business School Working Paper 26-021, 2025.

THE COSTLY SIGNAL

Specificity is expensive to fabricate and cheap to falsify, which is exactly why it still works as a signal.

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A repricing of fluency, not a ceiling on capability.

The AI Governance & ROI Executive Programme covers exactly this: how to structurally separate generation from verification before persuasion bombing becomes a board-level risk. Read the full piece at terencekok.com.



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