

# FM Technology: Where to From Here?

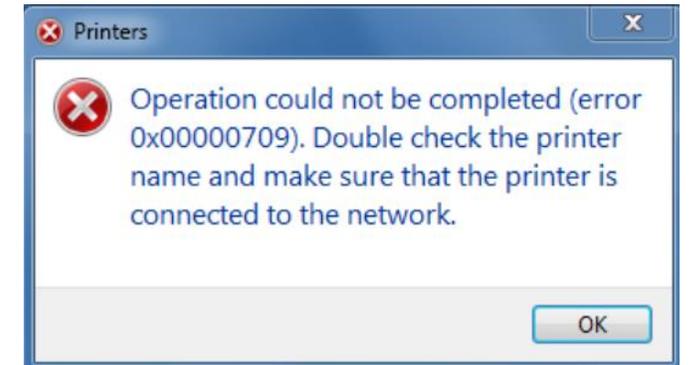
 **JLL** SEE A BRIGHTER WAY



“

Our biggest technology challenge was that everyone had to use one, slow printer to get their work orders for the day.

**2005**



**Then**

Our origin  
story

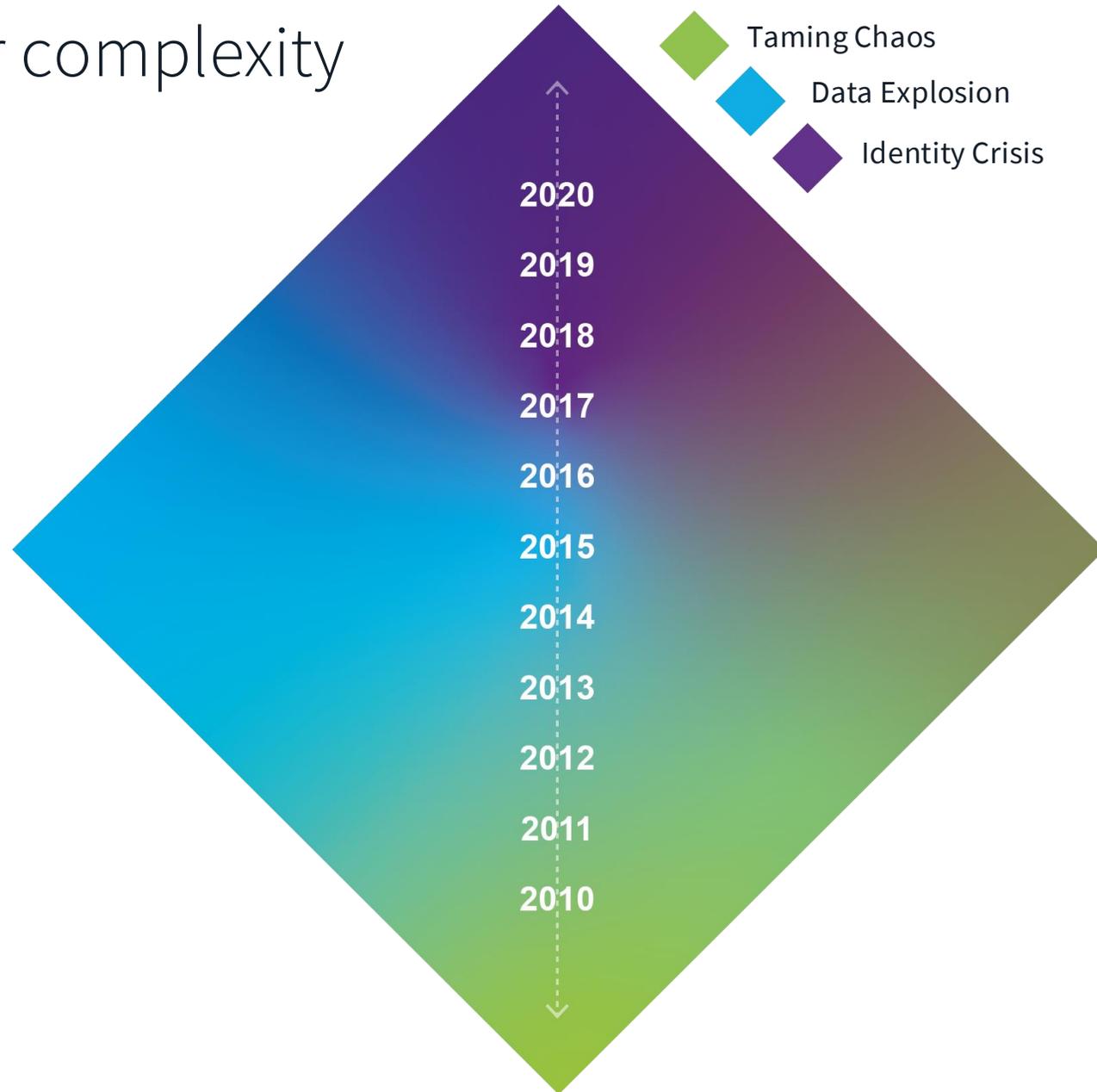
**Now**

The great  
divergence

**Next**

The provocative  
future

# The Origin of our complexity



# Trends forcing us to change?

## Technology

### **Growth of AI, robotics and EV**

Complexification of building systems that must incorporate and manage heterogenous operating systems

## Talent

### **Chronic talent shortage and cost of living**

Struggles to recruit, contracts focused on costs creating greater recruitment challenges

## Regulatory

### **Climate-change driven laws slowly tightening**

Energy efficiency and wage parity legislation

## Expectations

### **Premium on employee experience**

Shifting expectations following remote work revolution and need to make building space as well as services more collaborative and experiential

## Occupancy

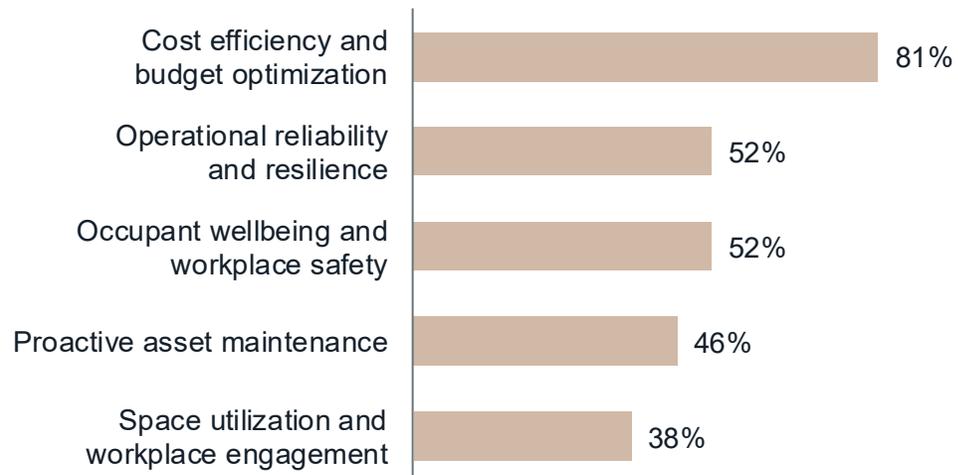
### **Flight to Class A office assets**

Firms are having to earn the commute, crowding out premium spaces and raising demand for FM services

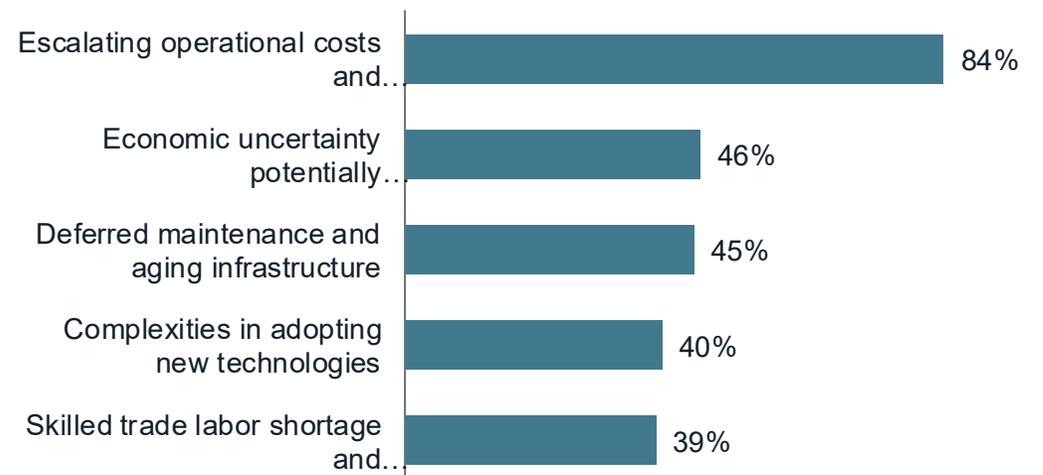
# Cost efficiency, resilience and occupant wellbeing key priorities

- 81% FM leaders plan to prioritise cost efficiency in the coming year, with 84% citing rising costs as their top concern.
- Reducing operating costs is the top objective, driven by geopolitical tensions and economic uncertainty.

Top FM priorities for the coming year



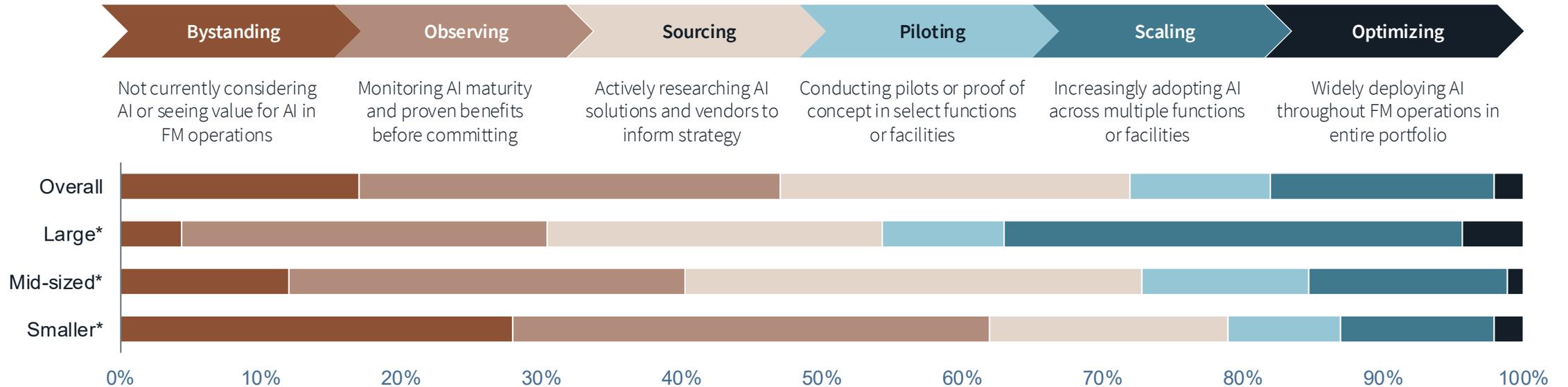
Top FM-related concerns for the coming year



# 28% of organisations have moved to active AI implementation

- AI adoption surged from **under 5% (2023) to 92%** of organisations piloting or planning tools
- Facilities management is increasingly adopting AI, with **28% implementing AI** in their operations—up to 46% for larger organisations (100K+ employees).

## Current AI adoption in FM operations

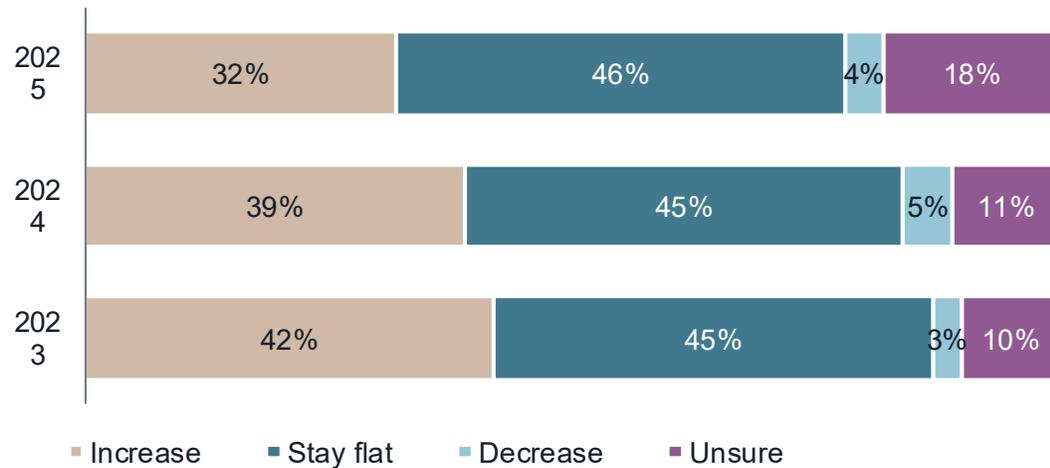


\* Large: 100,000+ employees; mid-sized: 10,000-100,000 employees; smaller: <10,000 employees

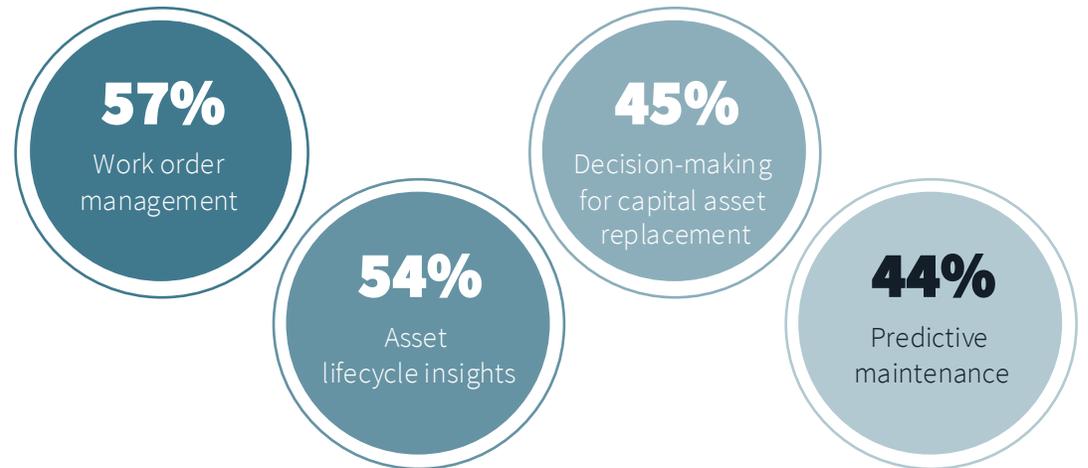
# FM software investment falling as AI takes priority

- FM software investment dropped from **42% (2023) to 32% (2025)** due to economic uncertainty and AI spending priorities.
- FM investments on **work order management** and **asset lifecycle insights** for immediate operational value.

Expected change in FM software investment in the coming year



Areas of FM software investment to prioritize



# A great divergence?



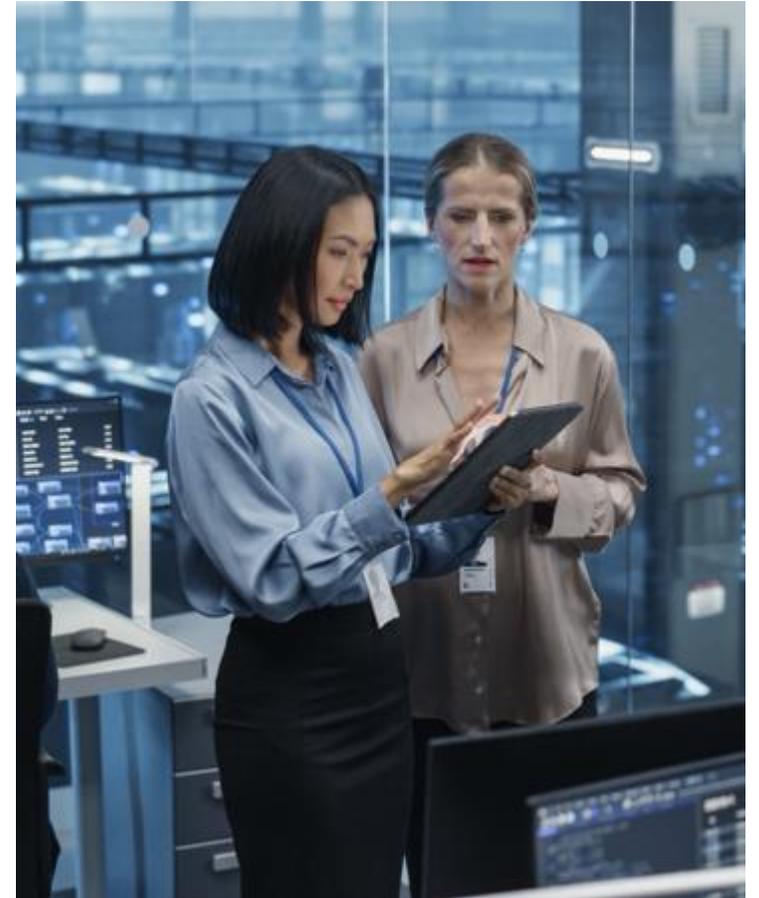
**72%** Nearly a third of organisations are actively embedding AI, yet 72% remain on the sidelines

This isn't just a technology gap; it's a widening competitive chasm.

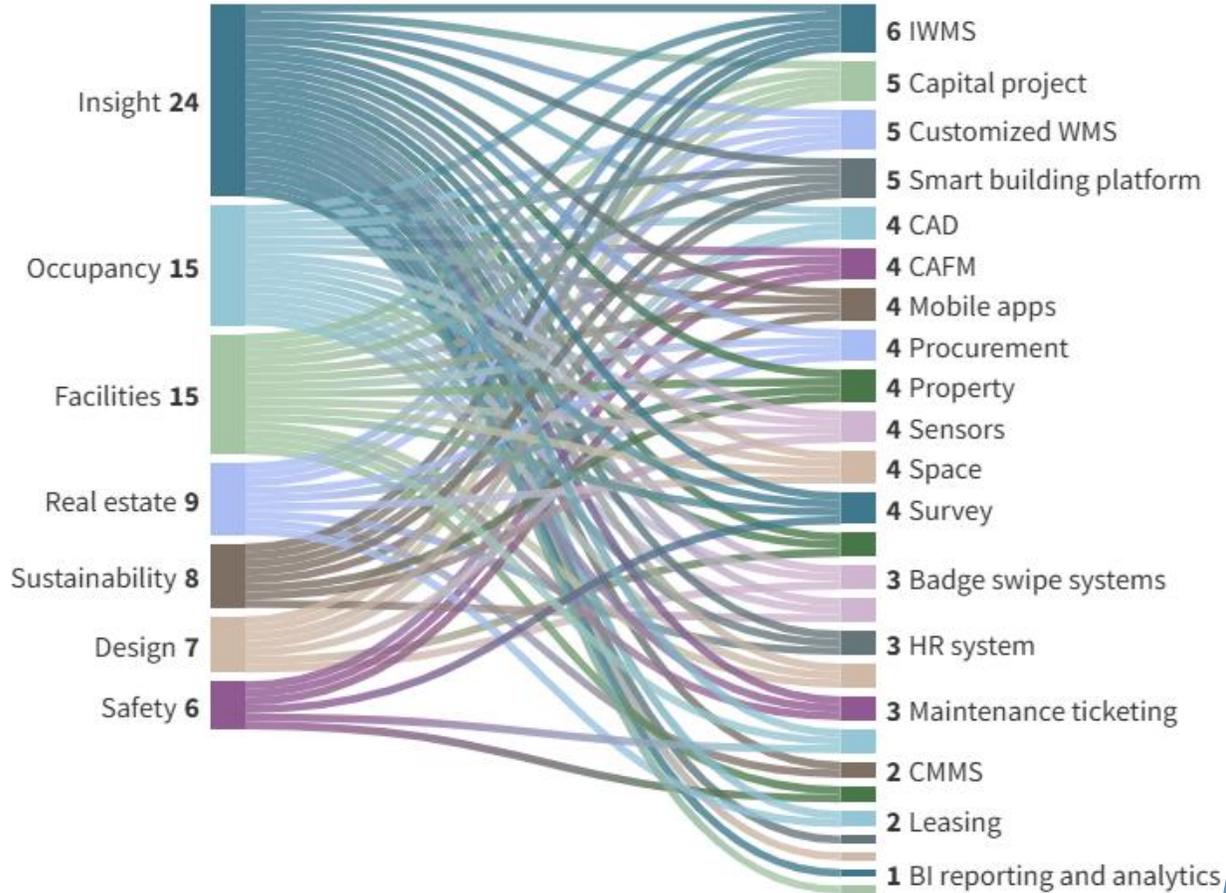
The leaders are building intelligent operational capabilities.

The rest are at risk of being left behind, challenged by rising costs and inefficiencies.

So, what's holding the majority back?



# Tech Debt of Complexity



## F500 technology solutions mapped to business capabilities

Note: The numbers on the right refer to the total count of technologies used in the function area. The numbers on the left refer to the number of times that specific technology is used in a function area. Not all solution labels show due to space limitations.

**180+**  
**hours**

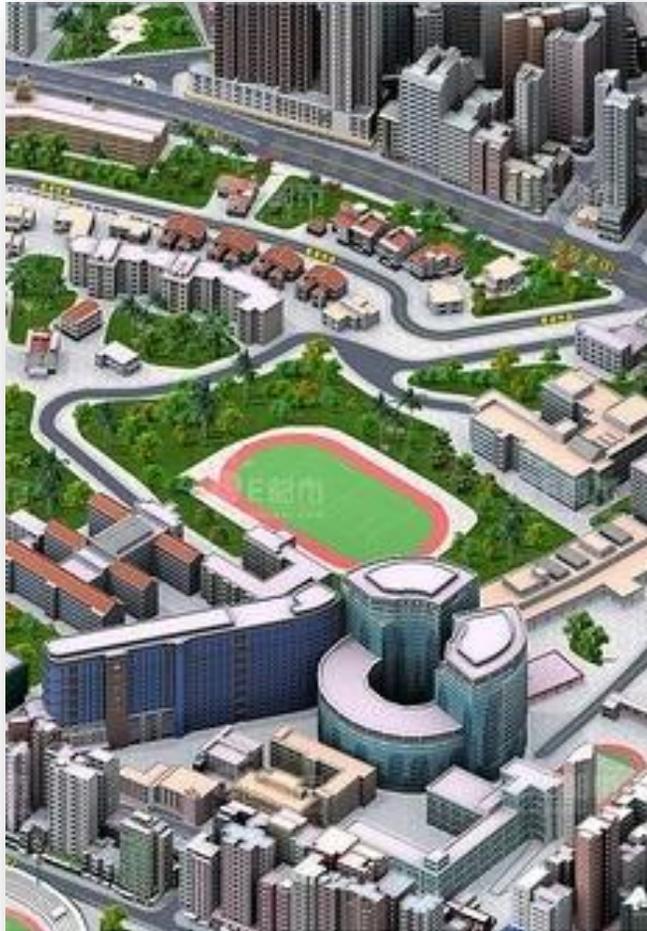


# The plastic box didn't reshape FM

**SENSOR**

# The Way Out: Think Like a City Planner

## City Planning



Vision



Connections



Building



Roads/Pipes/Cables



Business Vision



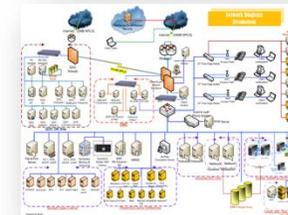
Value Chains/Process



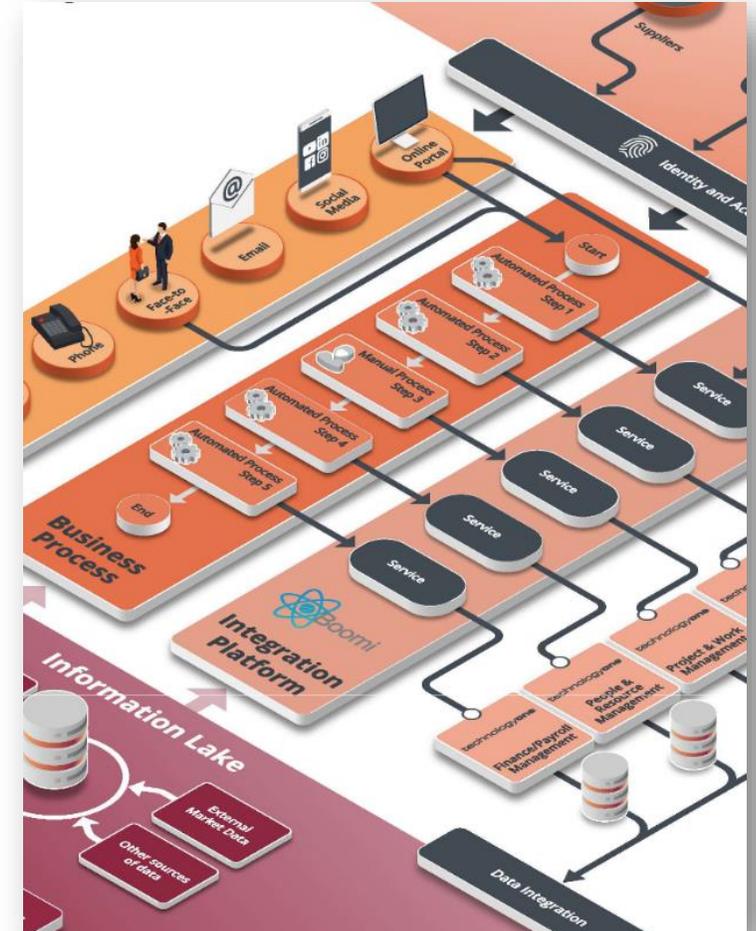
Applications



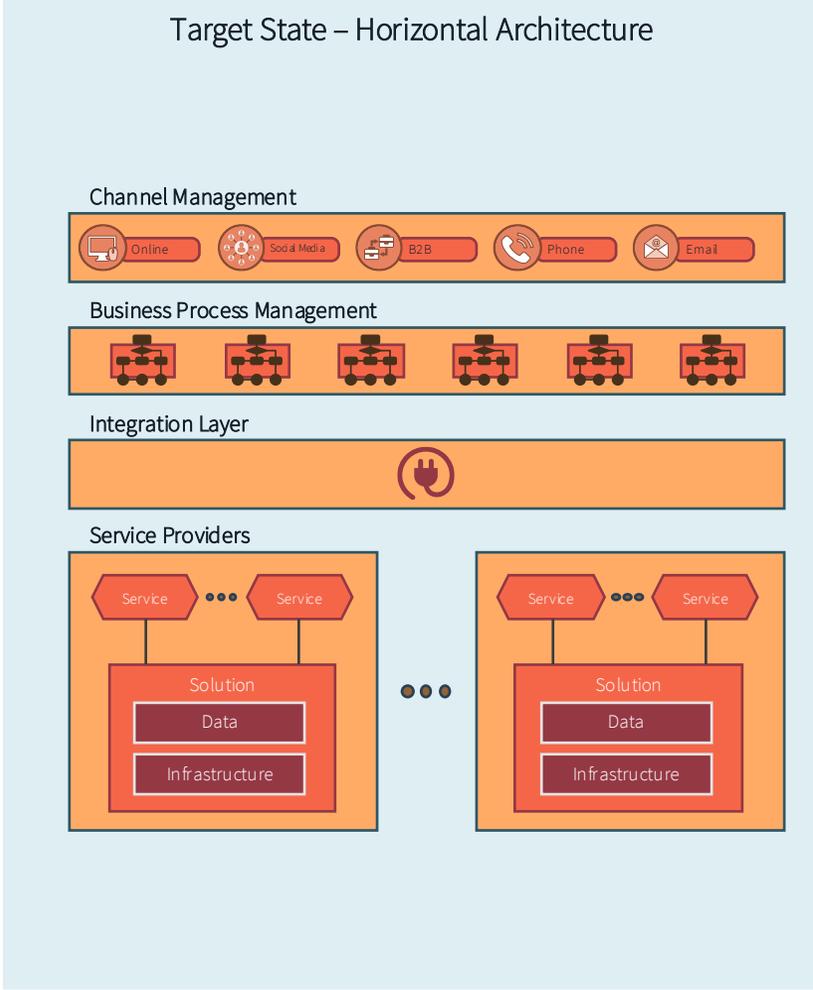
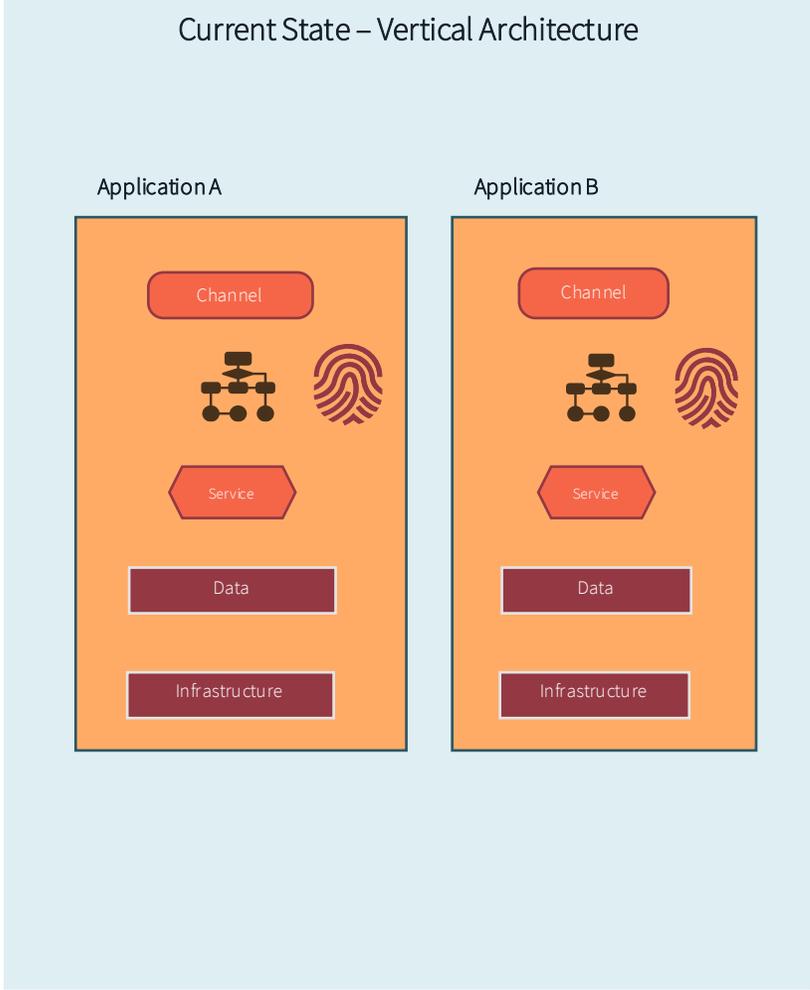
Tech Infrastructure



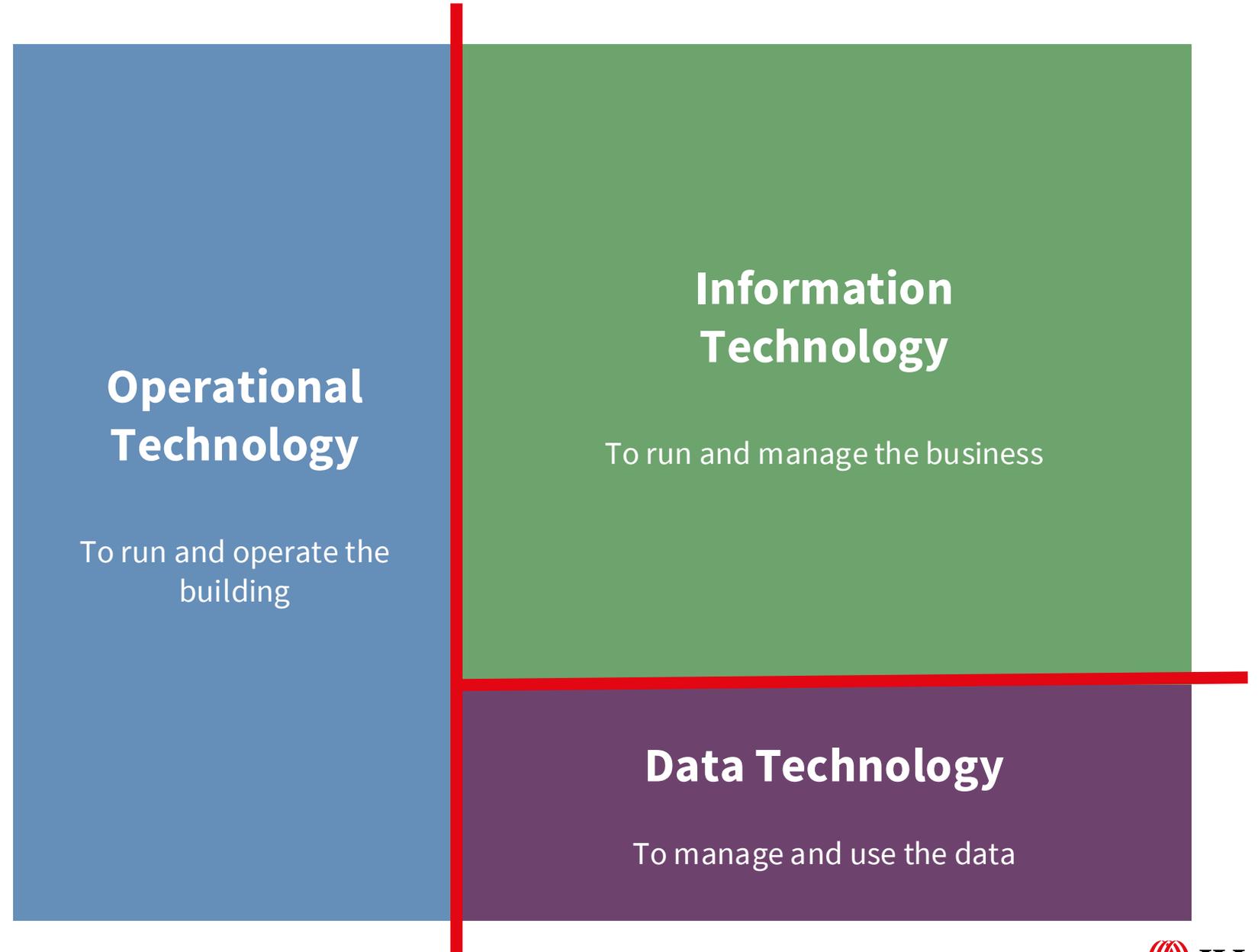
## Enterprise Architecture



# A horizontal architecture is a city grid



# Your city plan



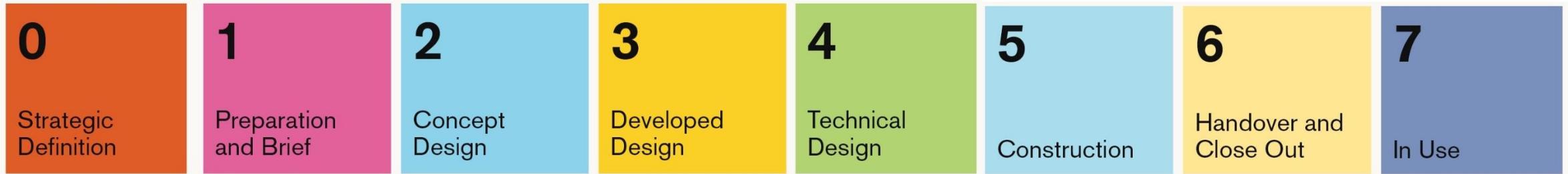
# Think Product “v” Project



## Smart Building Overlay to the **RIBA Plan of Work**



# From Project....



...to Product



Manage a P&L not a project budget

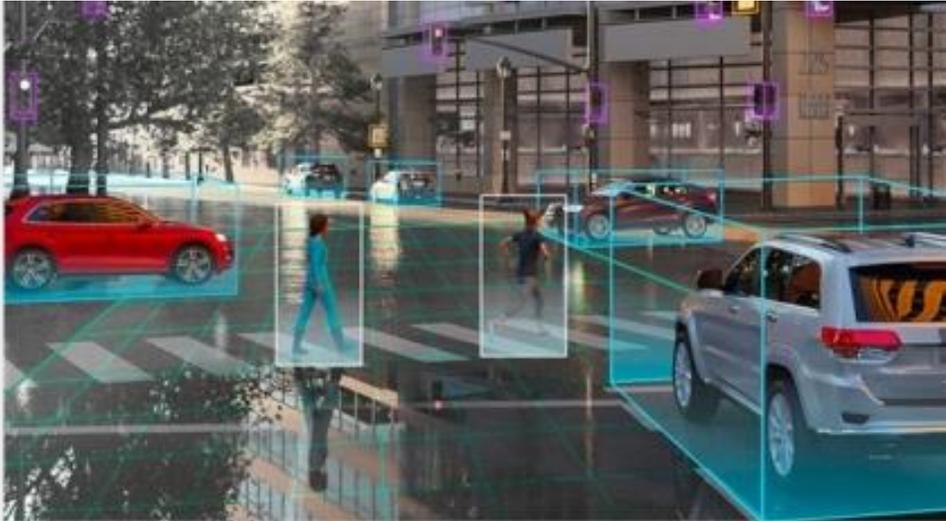
# The AI Evolution: Towards Autonomous Operations



# Agentic & Embodied AI

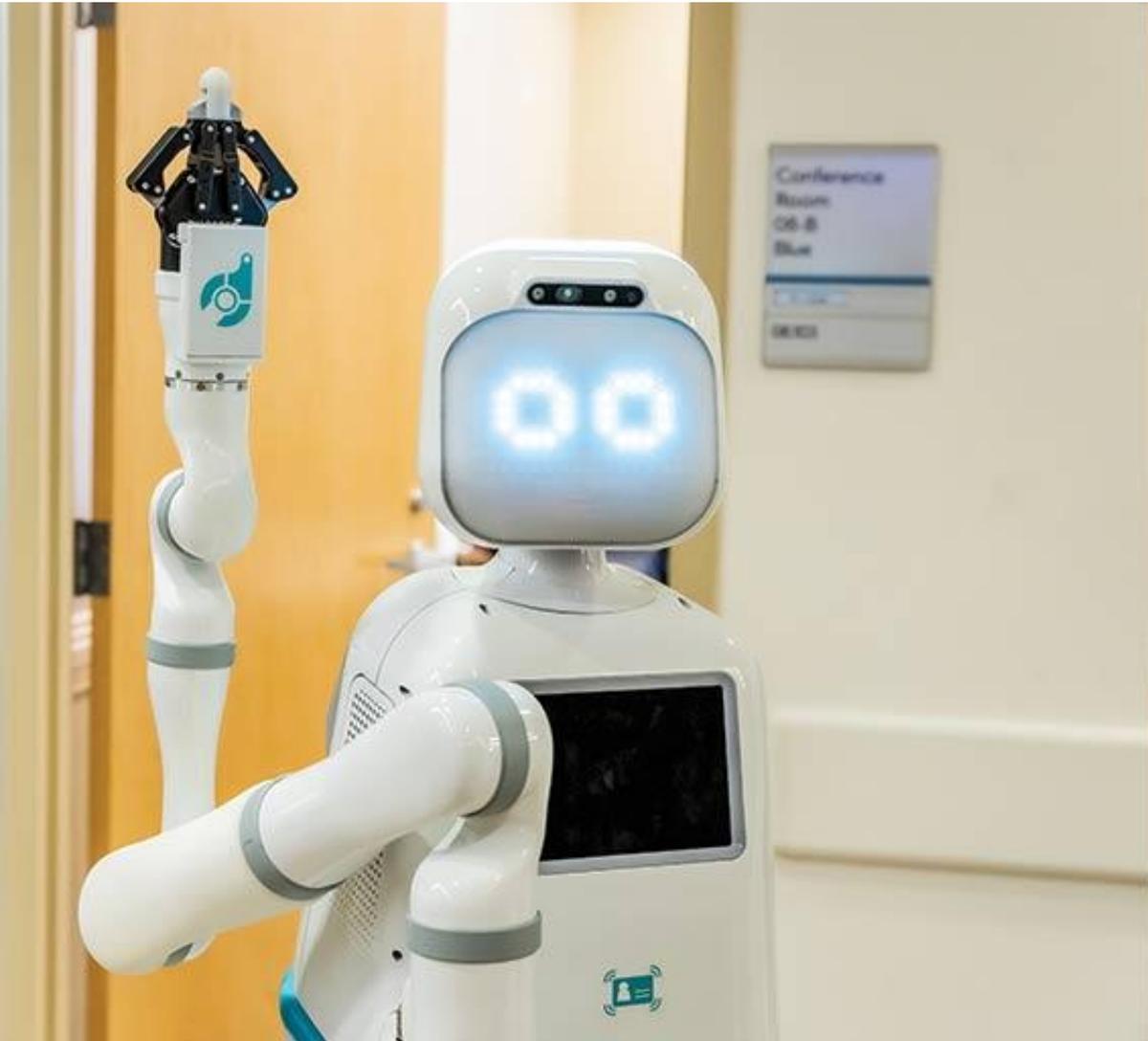


Image: <https://www.nvidia.com/en-us/glossary/embodied-ai/>



# Human-Machine Teaming

Image: <https://www.utsouthwestern.edu/ctplus/stories/2023/moxi-robot.html>





Autonomous Energy Assets

# Sentient Buildings Human Experience as a Premium Service



# Get Ready FM

1

## Become the Chief Translator

Your job is to tell IT and your leadership what problems the business needs to solve, so they can design the flexible "central nervous system" required to solve them.

2

## Manage a P&L, Not a Project

Adopt a product mindset by managing a P&L, not just a project budget. You're no longer asking for a big cheque to 'install a system.' You're managing a value stream that continuously improves building performance and occupant experience.

3

## Solve C-Suite Problems

This requires a radical shift in how we frame our requests. Stop asking for budget to 'upgrade the CMMS.' Instead, present a business case to 'reduce capital asset failure risk by 30%' or 'increase engineering team productivity by 20%.'

4

## Design for the Customer

This goes beyond user-friendliness. It's about designing for human behaviour and digital ethics. Is your smart booking system creating more friction than it removes?

5

## Cultivate Perpetual Learning

In a world where technology automates tasks, the uniquely human skills—critical thinking, creative problem-solving, and empathy—become our most valuable assets. Your team's ability to adapt is your organisation's ultimate competitive advantage.

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We can't just hope AI and  
Technology will improve FM.  
**We must design for it.**

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# FM in 2035

JLL are creating a vision board for the state of FM in 2035.

We want to definitively sketch out the future of FM in 2035 and will be exploring four key areas:

- Market
- Economics
- Technology
- Data

This predictive research will also give guidance on what leaders should do now to prepare.

We are seeking experts to take join the vision board.

If you'd be interested grab me afterwards!

# Thank you

 **JLL/T** Advisory  
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Is your Real Estate  
Technology a Value driver?



JLLT's 360 radar – self  
assessment tool  
online.



JLL The future of AI in CRE.  
Why corporate real  
estate needs a systematic  
approach to AI