

JLL: How Physical AI Will Walk, Talk and Operate The Building

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The building, its data and its contracts decide what robots achieve

Michael Ewert and Juan Pablo Negus of JLL argued that robots are ready for a set of narrow building tasks, and that the building, its data and its contracts shape the results. JLL's 2025 survey found 69% of large occupiers report robots deployed, but only 23% report full integration with efficient operations, and occupiers rated robotics lowest of all property technologies for user satisfaction. Mobile robots, drones and building systems account for every mature use case, while humanoids still face gaps in safety, uptime, dexterity and cost. Orchestration, the layer that assigns work across robots, AI agents and people, sits at 1% to 5% adoption. In one audited building, connectivity, lift access and the human-robot plan all scored zero. Where FM contracts price labour hours, a saved hour cuts supplier revenue and the occupier sees no saving.

KEY TAKEAWAYS

- Digital and data is where robots most often stop, and it is the lowest-cost readiness layer to change.
- Where FM contracts price labour hours, a saved hour cuts supplier revenue; outcome pricing shares the saving.
- With 5 to 10 years from inception to operation, today's specifications shape robot readiness in the 2030s.
- The EU Machinery Regulation, covering autonomous mobile machinery, applies from 20 January 2027.
- The starting points JLL identified need no robot and no capital approval.

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