PIIA FM

International Open Innovation Programme in Facility Management

Robotisation study in the services sector

March 2026

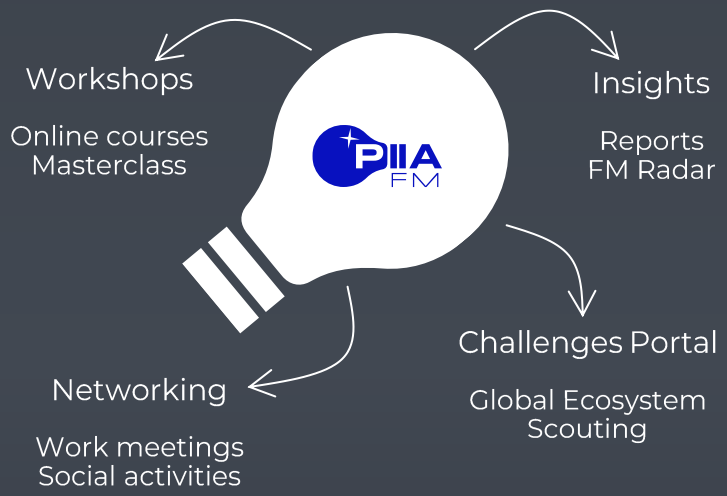
THE STUDY

This document is part of the Insights from the Innovation Programme (PIIIA), through which the FMHOUSE Group promotes the generation of knowledge and the dissemination of the most relevant trends in the field of Facility Management.

The study is included in a broader report, exclusive to the companies participating in the PIIA, which thoroughly examines the current state and the relationship of robotisation with our sector. The survey results are published openly as a token of appreciation to those who responded to the questionnaire and to give visibility to the programme.

ABOUT THE PROGRAMME

Being part of the PIIA provides companies with a way to anticipate future changes through workshops, networking opportunities, the innovation ecosystem, and resources such as this document.



The programme is open to clients and suppliers at an international level.

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The authors

Over the span of these 14 years, the FMHOUSE Group has established itself as a global benchmark in consultancy and training, also standing out for its contribution to the Facility Management market in terms of innovation and research. This report, one of the deliverables of the PIIA, contributes to the generation and dissemination of specialised knowledge to promote development in the sector.

FMHOUSE GROUP

FMHOUSE

With a portfolio exceeding 200 clients across 34 countries, we have established ourselves as global leaders in specialised consultancy in service models, benchmarking, digital transformation, and certifications in Facility Management, always maintaining an objective, professional, and ethical approach.

Instituto FMHOUSE

We offer 64 programmes covering Master's degrees, Accreditations, Diplomas, Specialisations, and Short Courses. These are available in both Spanish and English, and we also provide the option to design customised programmes tailored to the specific needs of each individual or organisation.

PIIA FM

This exclusive programme offers companies access to seminars and materials on the latest trends and developments, as well as opportunities to build professional relationships and become part of a global innovation network. It is aimed at both end clients and suppliers.

In collaboration with

LatamFM

LatamFM is the only Spanish-language digital platform where professionals and companies in the Facility Management sector can debate, collaborate, or connect, always acting with the highest standards of ethics, objectivity, and mutual respect.

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survey

strategy

The objective of the study is to understand the market situation and the perception of robotisation, in order to include the results in the global study being developed within the PIIA. The study's design criteria were:

- International scope, without segmentation by country.
- Questionnaire in Spanish and English, distributed via social media.
- Differentiation between responses from clients and suppliers.
- Estimated time to complete the survey under 90 seconds.

questionnaire

The questions are designed to assess the current situation and potential trends. The most relevant robots for the sector, as well as the barriers and key enablers applicable to clients and suppliers, have been studied and evaluated beforehand. This information has been used to define the five questions posed:

Q1. Situation regarding any type of service robotisation.
Q2. Barriers that hinder the robotisation processes.
Q3. Key enablers that promote the robotisation of services.
Q4. Level of knowledge of the 14 types of robots.
Q5. Five-year outlook for robotisation in Facility Management.

sample

The study was conducted in the last quarter of 2025, obtaining a total of 632 responses, which provides a high statistical accuracy. The margin of error is ±3.9%, with a confidence level of 95% (p=0.5). The sample for segmentation is well balanced, with 54.9% of responses from clients and 45.1% from suppliers. Questions Q2, Q3, and Q4 are multiple-response, so the percentages shown do not add up to 100%.

Margin of error
±3,9%

Confidence level
95%

n=632

Clients
54,9%

Suppliers
45,1%

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Q1

Perception of robotisation

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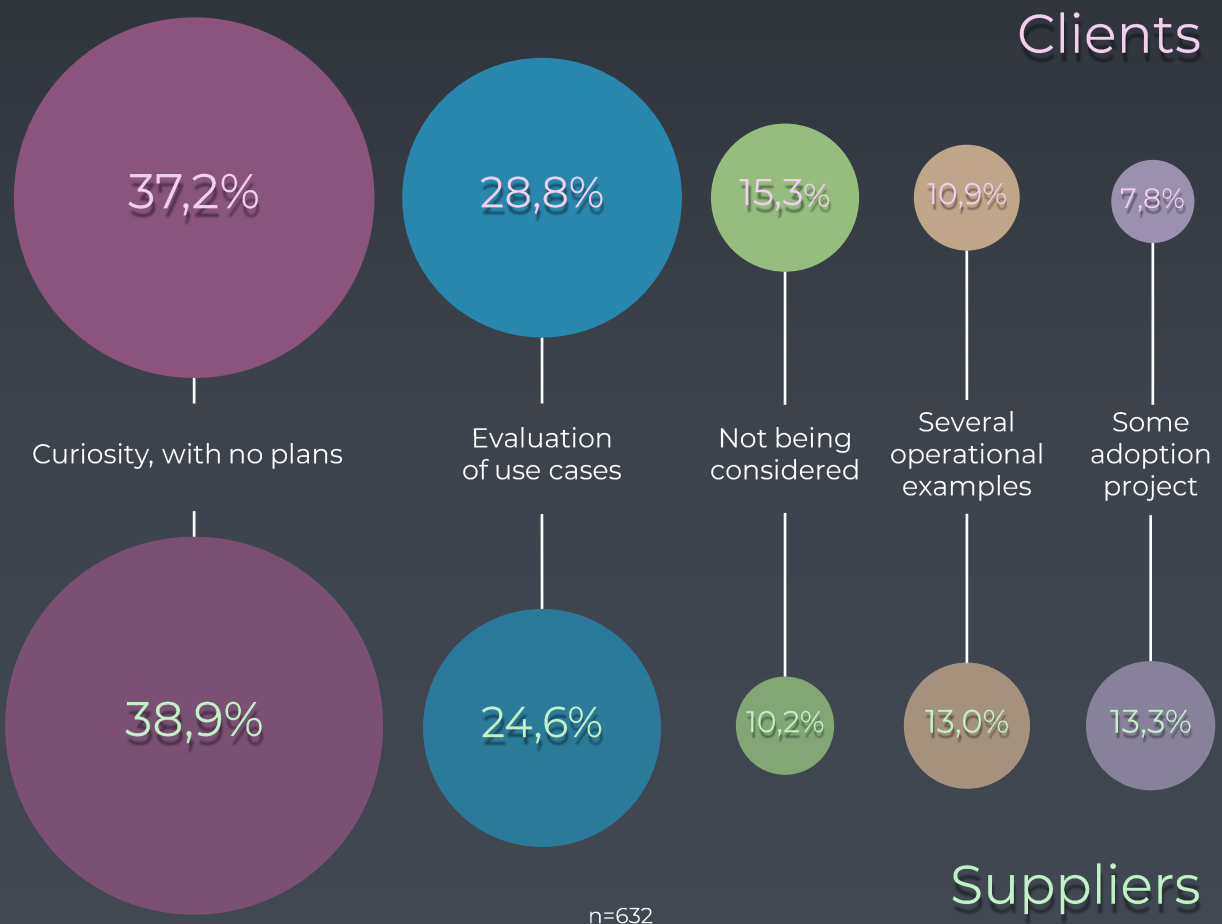
Q1

Perception of robotisation

Current situation of organisations with regard to any type of service robotisation:



The results of Question 1 from the survey show that both clients and suppliers are mostly in the early stages of robotisation, where curiosity and evaluation prevail over adoption. However, suppliers demonstrate greater openness and progress in implementation, with more operational projects and less rejection. This scenario indicates that robotic transformation is advancing slowly, but it is the suppliers who lead the change and show a greater willingness to integrate automated solutions into their processes.

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Q2

Barriers to robotisation

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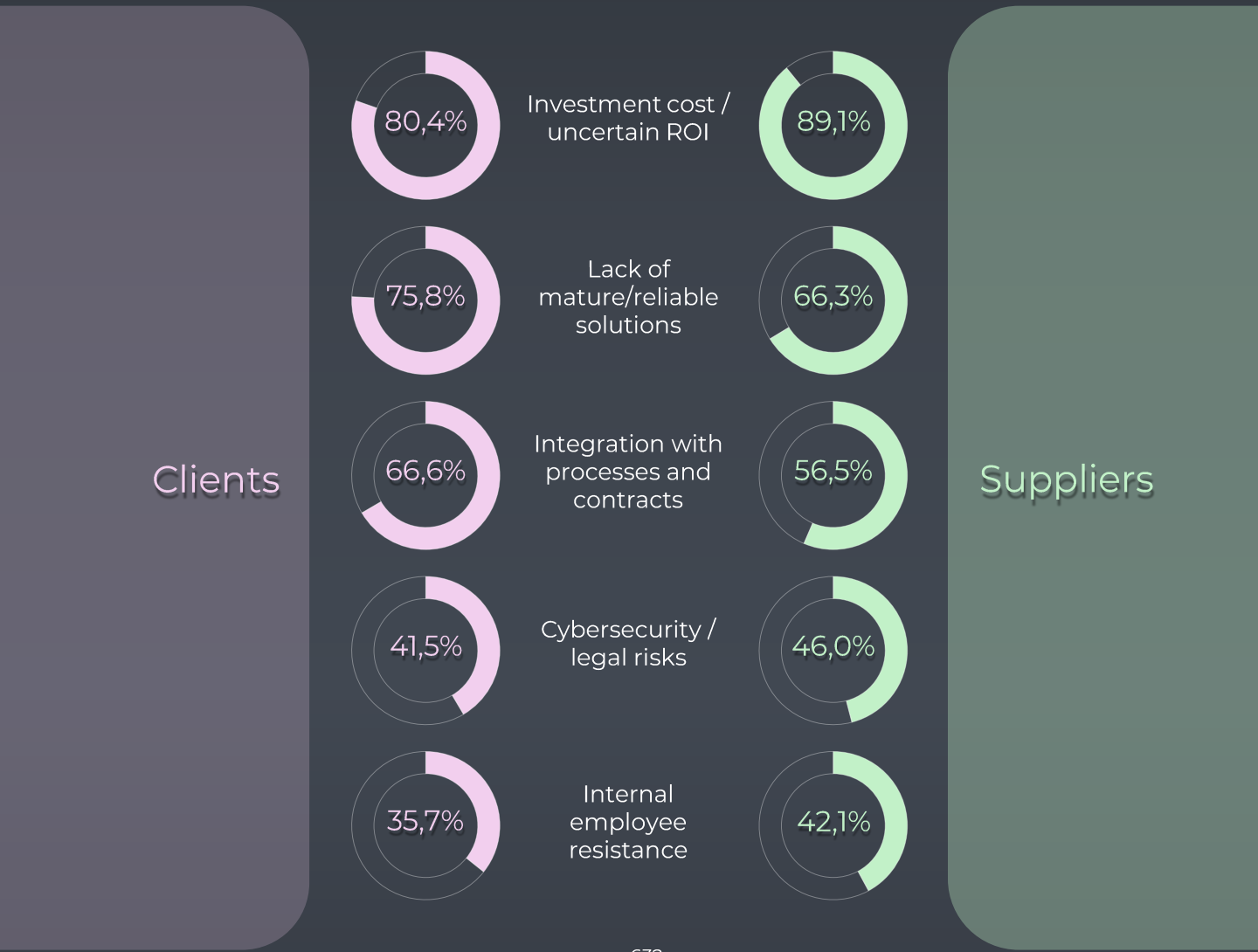
Barriers to robotisation Q2

The summary chart corresponding to Question 2 of the survey shows the perception of clients and suppliers regarding the main barriers to the adoption of robotisation. The investment cost, solution maturity, and their integration into processes exhibit a deviation of around 9-10% between the two groups. Internal resistance and cybersecurity and legal risks show smaller differences, approximately 5-6%. Each of these barriers is analysed individually below.



n=632

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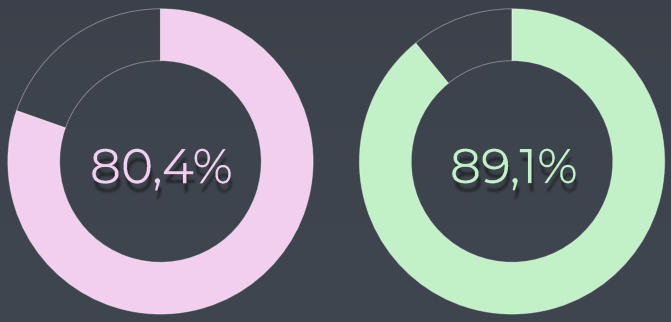
Barriers to robotisation Q2

Investment cost and uncertain ROI

The cost of investment and uncertain returns stand out as the most significant barriers to advancing automation. This includes the initial outlay and the lack of solid evidence regarding savings, quality improvements, or payback periods. Both clients and suppliers share these concerns, but suppliers tend to be more proactive and confident in demonstrating the value of their solutions, whereas clients remain more cautious due to questionable profitability.

Clients

represent 44.1% of the total sample



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Suppliers

represent 40.2% of the total sample

- It is the most frequently cited barrier by both groups, with greater intensity among suppliers.
- Economic and financial analysis acts as the entry filter for any robotisation project.
- Uncertainty regarding savings and payback periods delays decision-making and reduces the scope of pilot projects.
- Lack of financial viability prevents potential initiatives from reaching the deployment phase.

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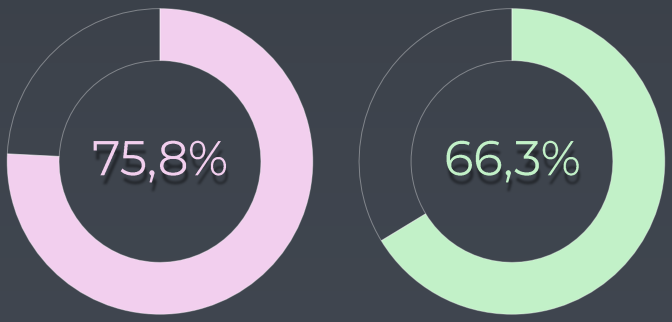
Barriers to robotisation Q2

Lack of mature solutions

Another of the main barriers to robotisation is the lack of mature and demonstrably reliable solutions. There is a perception that the technologies currently available have not yet proven sufficient reliability in real-world operation, particularly in complex environments and when integrated with other systems. Clients and suppliers share these concerns, although the former tend to be more cautious. They fear failures, unplanned downtime and integration issues that could affect day-to-day services delivery. The lack of accumulated experience, clear references and contracts that adequately cover risks delays investment decisions and large-scale deployments.

Clients

represent 41.6% of the total sample



Suppliers

represent 29.9% of the total sample

n=632

- The maturity and reliability of solutions are a decisive criterion for clients when approving robotisation projects.
- A trust gap persists, with clients demanding more evidence and proven use cases.
- For suppliers, although relevant, this factor is somewhat less decisive compared to other implementation challenges.
- Accelerating the development and validation of robust solutions could act as a catalyst, boosting confidence and adoption across the sector.

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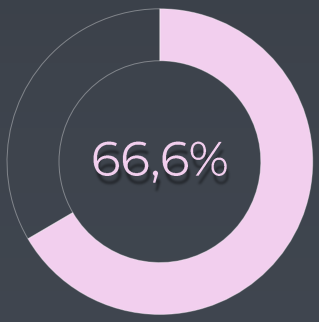
Barriers to robotisation Q2

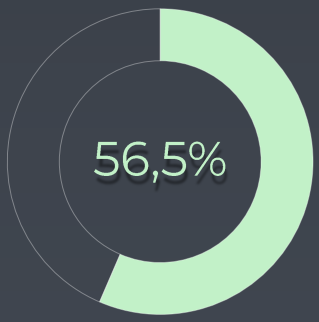
Integration with processes and contracts

The integration of robotic solutions with existing processes, service contracts and compliance requirements presents challenges that may generate internal resistance and additional administrative burden. For clients, this involves adjustments to day-to-day operations and potential contract renegotiations, which is why it is perceived as a critical factor in the decision to robotise. For suppliers, the challenge lies in demonstrating flexibility, supporting the transition and showcasing their capability to integrate these solutions.

Clients

represent 36.6% of the total sample





Suppliers

represent 25.5% of the total sample

n=632

- It is the third most significant barrier and has a greater impact on clients than on suppliers.
- It requires a review of existing processes, tasks and signed contracts, generating concerns about potential impacts on daily operations.
- The gap of around 10 percentage points between clients and suppliers translates into greater caution on the client side and longer negotiation cycles.
- Without a joint review of processes and service levels, integration becomes a bottleneck for scaling robotisation.

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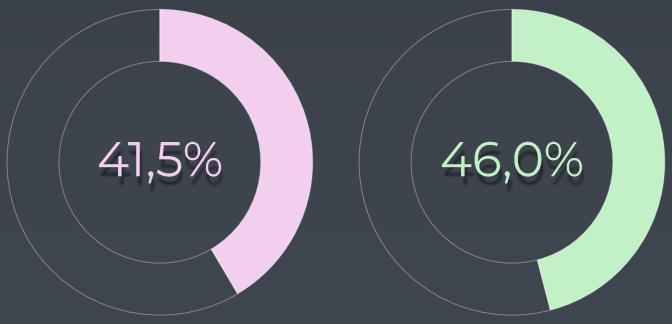
Barriers to robotisation Q2

Cybersecurity and legal risks

Robotisation not only involves technical challenges, but also cybersecurity and legal compliance risks. This includes potential unauthorised access, service disruptions, data protection breaches and uncertainty regarding liability in the event of incidents. Both clients and suppliers share a similar level of concern, with slightly greater sensitivity among suppliers, who have first-hand knowledge of the security requirements, certifications and regulatory compliance demanded by more advanced projects, as well as the consequences of potential failures.

Clients

represent 22.8% of the total sample



Suppliers

represent 20.7% of the total sample

n=632

- Around four in ten clients and almost half of suppliers consider these risks to be a relevant barrier.
- Concerns include unauthorised access, service disruptions and potential regulatory sanctions.
- Suppliers show greater sensitivity due to their direct responsibility for security and compliance.
- Without “security by design” approaches, robust access controls and support for legal compliance, the perceived risk remains high and hinders adoption.

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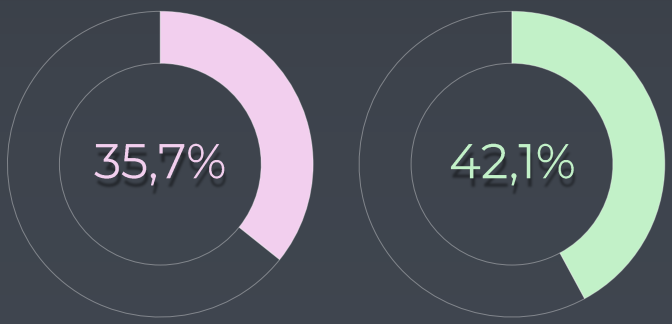
BARRIERS TO ROBOTISATION Q2

INTERNAL EMPLOYEE RESISTANCE

Internal resistance among employees refers to reluctant attitudes, fears of job loss, changes in roles, and the need to acquire new skills, as well as distrust towards unfamiliar technologies. The results show that suppliers identify this resistance more frequently than clients, due to their direct experience in previous projects and a greater awareness of change management. Without appropriate management, this resistance may delay adoption or jeopardise the success of a potential implementation.

Clients

represent 19.6% of the total sample



n=632

Suppliers

represent 19% of the total sample

- Approximately one in three clients and two in five suppliers identify this barrier, confirming its relevance in the implementation of robotic solutions.
- Resistance increases when robotisation is perceived as a replacement for jobs rather than as support for work and an improvement in working conditions.
- The fact that suppliers detect more resistance than clients indicates a risk of underestimating the issue within organisations.
- Clear communication, early involvement and targeted training can be key instruments in mitigating this barrier.

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Q3

Key enablers for robotisation

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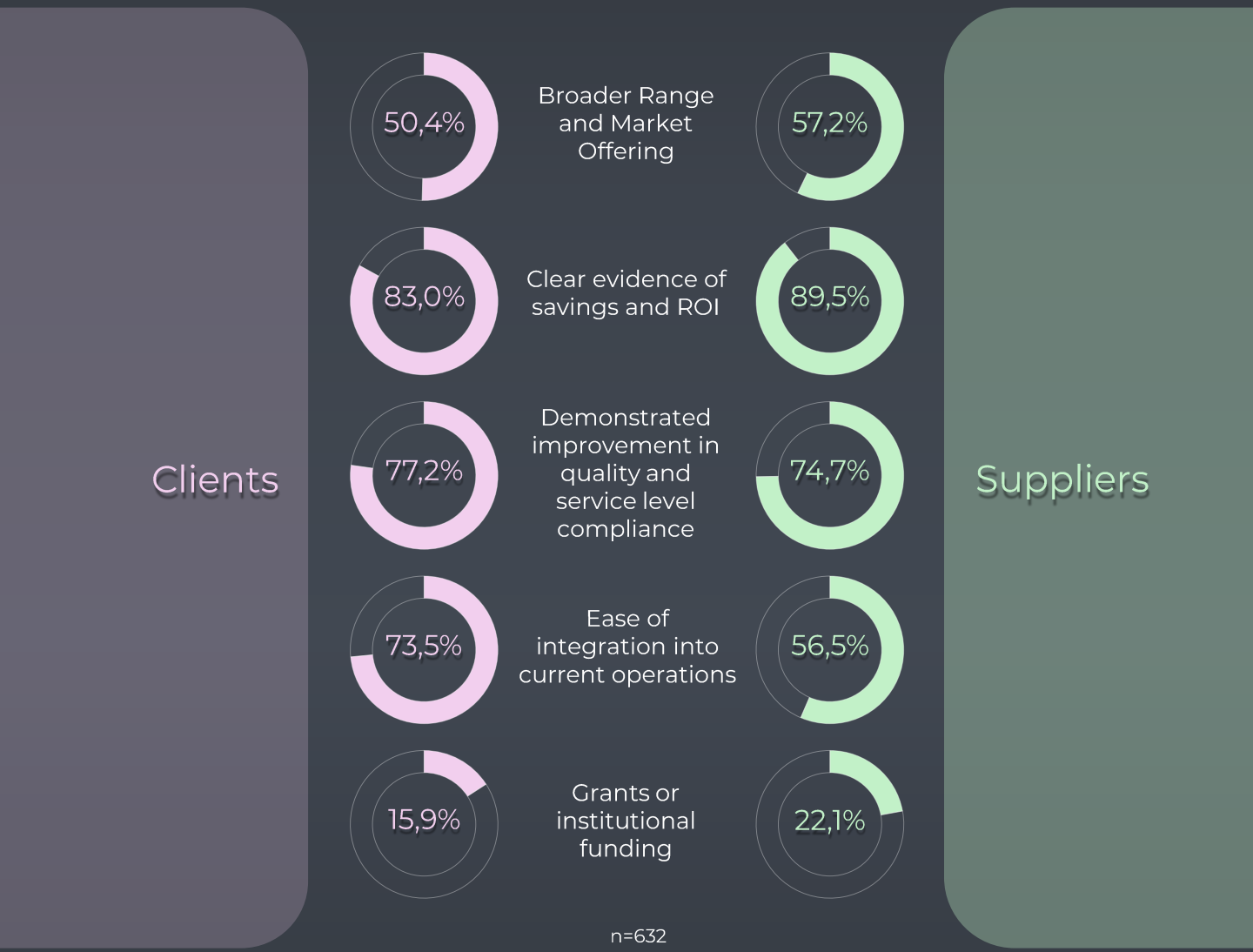
Key enablers for robotisation Q3

In Question 3 of the survey, participants identify the main key enablers that can drive robotisation. Clear evidence of savings and improvements in quality and SLA compliance emerge as the most relevant factors, with a high level of alignment between both groups, ranging around 2–6%. The largest difference appears in the area of integration into current activity, where the importance for clients exceeds that of suppliers by 17 points. Grants and institutional funding are identified as a secondary enabler. The following sections analyse these key enablers individually.



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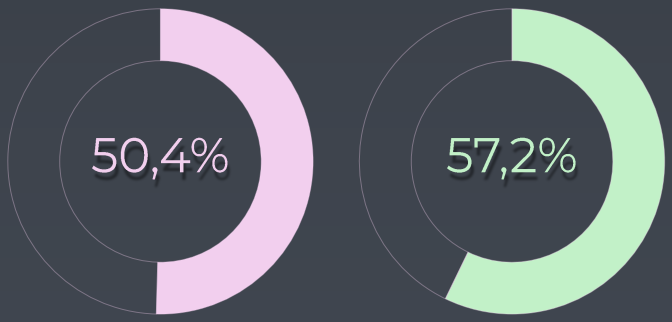
Key enablers for robotisation Q3

Broader range and market offering

The availability of a broad and diverse market offering of solutions represents a relevant enabler for slightly more than half of the sample. This is not merely about increasing the number of “robots”, but about having options tailored to different asset types, service levels and contractual models. This diversity makes it easier to compare proposals, modulate investment and select realistic use cases, reducing perceived risk and encouraging a progressive implementation aligned with each organisation’s technological and operational maturity.

Clients

represent 25.8% of the total sample



Suppliers

represent 27.7% of the total sample

n=632

- Almost one in two participants mention this enabler, ranking below ROI and quality.
- Clients value it 7 points less than suppliers, reflecting a demand for a more varied catalogue.
- Its moderate weight indicates that the offering already exists, but that opportunities are still perceived in specific niches (certain building types, specialised services or regulated environments).

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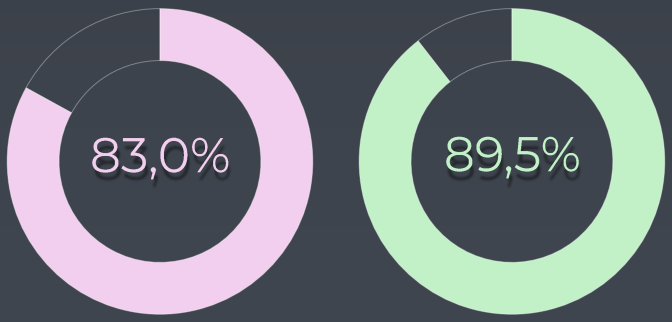
Key enablers for robotisation Q3

Clear evidence of savings and ROI

The quantitative demonstration of savings and return on investment is positioned as the most decisive enabler for advancing robotisation. Organisations need to translate projects into figures that are comparable with other initiatives, such as cost reductions, productivity improvements, impact on service levels or reductions in operational risks. Having data and real use cases that evidence tangible profitability makes it possible to prioritise initiatives, justify budgets and support decisions at executive level. Without a solid business case, robotisation is perceived as interesting, but not a priority when compared with other investment alternatives.

Clients

represent 45.6% of the total sample



n=632

Suppliers

represent 40.3% of the total sample

- It is the most frequently cited enabler, accounting for close to 86% of total responses.
- Clients and suppliers show a high level of alignment, with a difference of only 6.5 percentage points between the two groups.
- Its weight positions ROI as a prerequisite: without clear figures, the remaining enablers lose strength and adoption decisions are delayed.

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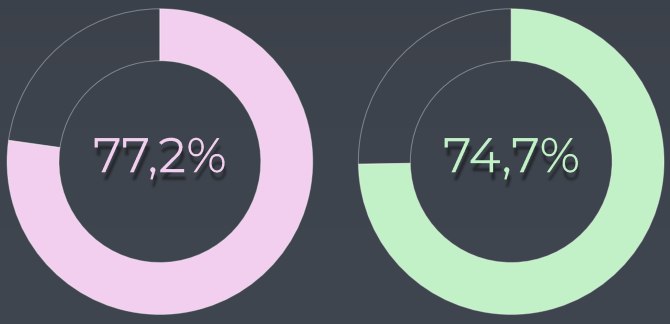
Key enablers for robotisation Q3

Improvement in quality and service level compliance

This key enabler reflects the extent to which robotisation contributes to sustaining and enhancing quality standards and ensuring compliance with service levels. It is not merely about “doing the same at a lower cost”, but about performing tasks with greater consistency, traceability and a lower probability of error. The availability of objective indicators, audits and evidence makes it possible to demonstrate that results are stable over time, meet agreed timelines and maintain the end-user experience, thereby reinforcing confidence in automation as a genuine improvement to day-to-day operations.

Clients

represent 42.4% of the total sample



n=632

Suppliers

represent 33.7% of the total sample

- It accounts for around three quarters of the responses, positioning it as the second key enabler after ROI.
- The deviation between clients and suppliers is very low (around 2–3 points), indicating an almost complete consensus.
- Its weight reinforces the idea that robotisation is assessed both in terms of economic efficiency and its impact on perceived quality and service level compliance.

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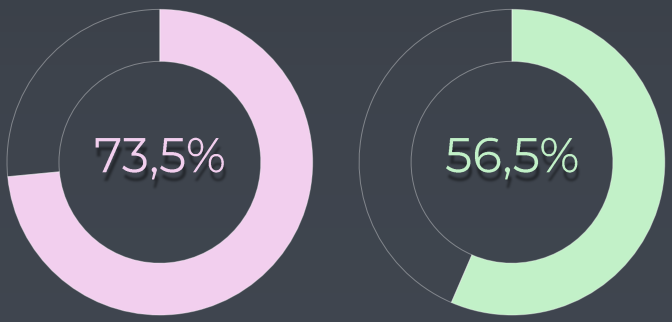
Key enablers for robotisation Q3

Ease of integration into current operations

This section highlights the importance of ensuring that solutions integrate with existing processes, contracts, and systems without generating significant friction. Organisations seek projects that can be implemented in a phased manner, with manageable learning curves and without disrupting or putting day-to-day operations at risk. This requires compatibility with management systems and data, as well as adjustments to roles, shifts and work routines. When integration is straightforward and minimally disruptive, robotisation is perceived as a versatile resource capable of delivering value from day one.

Clients

represent 40.3% of the total sample



n=632

Suppliers

represent 25.5% of the total sample

- It is a key enabler for nearly two thirds of the sample.
- It presents the largest deviation between groups, with a 17-point gap.
- The higher priority given by clients shows that operational compatibility and minimal disruption remain essential conditions for progressing in robotisation.
- The lower priority among suppliers indicates that, despite being well aware of implementation risks, they are confident in their internal capability to manage them.

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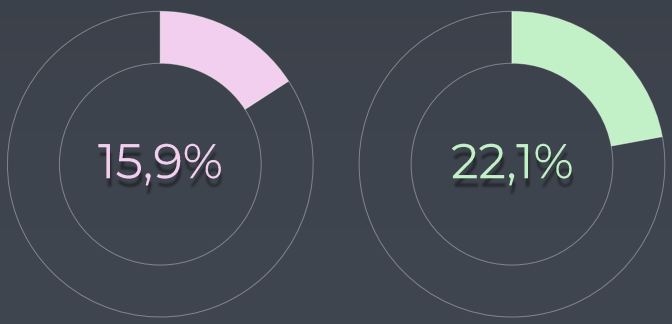
Key enablers for robotisation Q3

Grants or institutional funding

This key enabler reflects the impact of grants, tax incentives or financing schemes that help launch robotisation projects requiring high initial investment. Its weight is clearly lower than that of other economic or operational key enablers, which indicates that decisions rely primarily on profitability and operational improvement. However, in organisations with tighter budget constraints or in projects with limited returns, such external support can be decisive in unlocking adoption and reducing perceived risk.

Clients

represent 8.7% of the total sample



Suppliers

represent 10% of the total sample

n=632

- Only 1 in 5 respondents mention it, confirming it as a secondary key enabler.
- Suppliers highlight it around 6 points more than clients, suggesting that they see these forms of support as a way to activate projects that clients would not prioritise on their own.
- Its limited weight in the results shows that, although useful, external financing is a complement rather than a primary driver of decision-making.

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Q4

KNOWLEDGE OF THE SOLUTIONS

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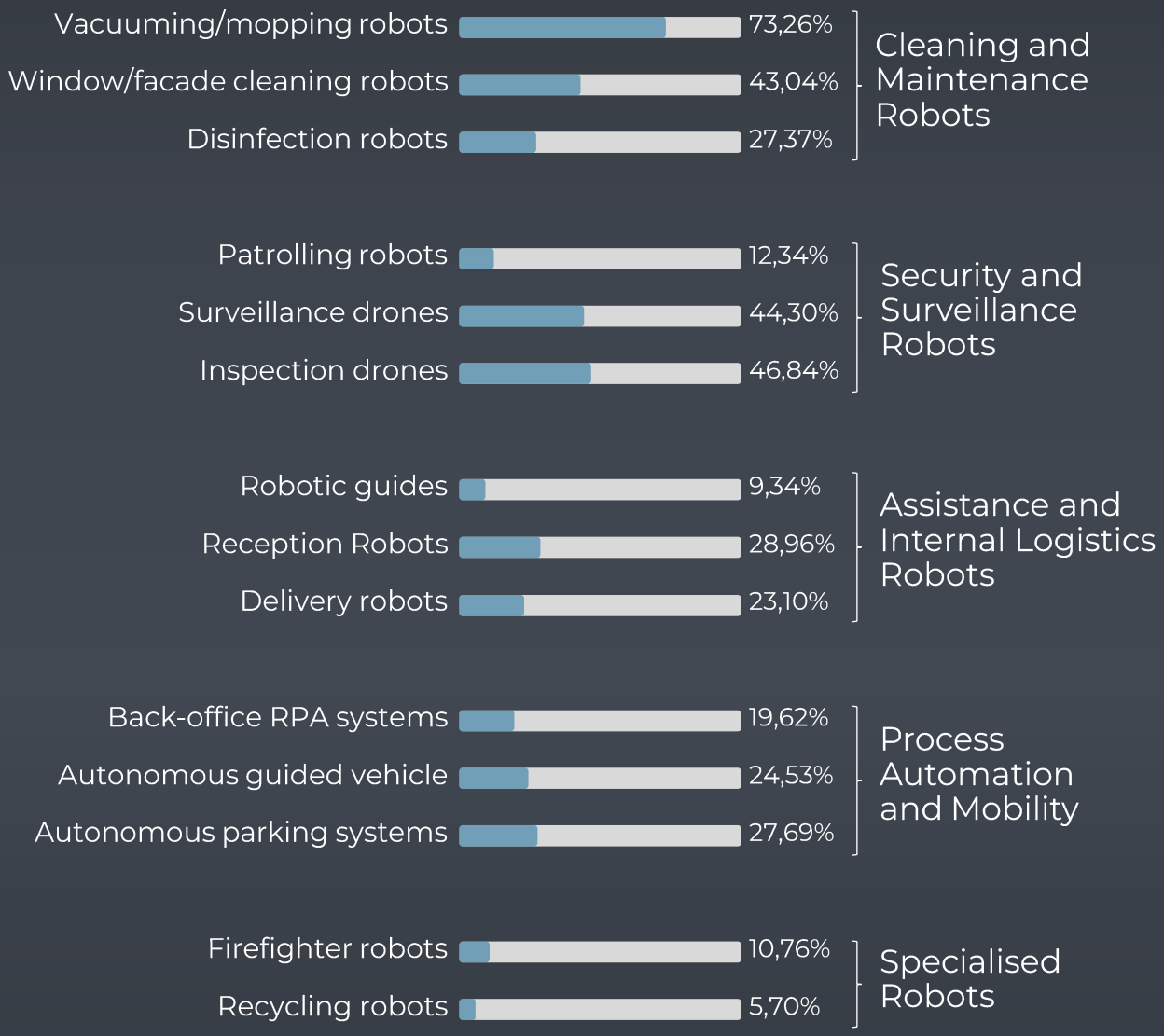
KNOWLEDGE OF THE SOLUTIONS Q4

Question 4 of the survey gathers the self-reported functional knowledge level regarding various robotic solutions, assessing not only whether they are recognised but also if their operation and advantages are understood. It is a multiple-response question: each respondent could select several options, so the percentages indicate the proportion familiar with each solution and do not add up to 100%. The technologies are grouped into categories to facilitate comparison. It is observed that more commonly used solutions show higher levels of knowledge, whereas the more specialised or innovative options remain less familiar.



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Q5

OUTLOOK FOR ROBOTISATION IN THE SERVICES SECTOR

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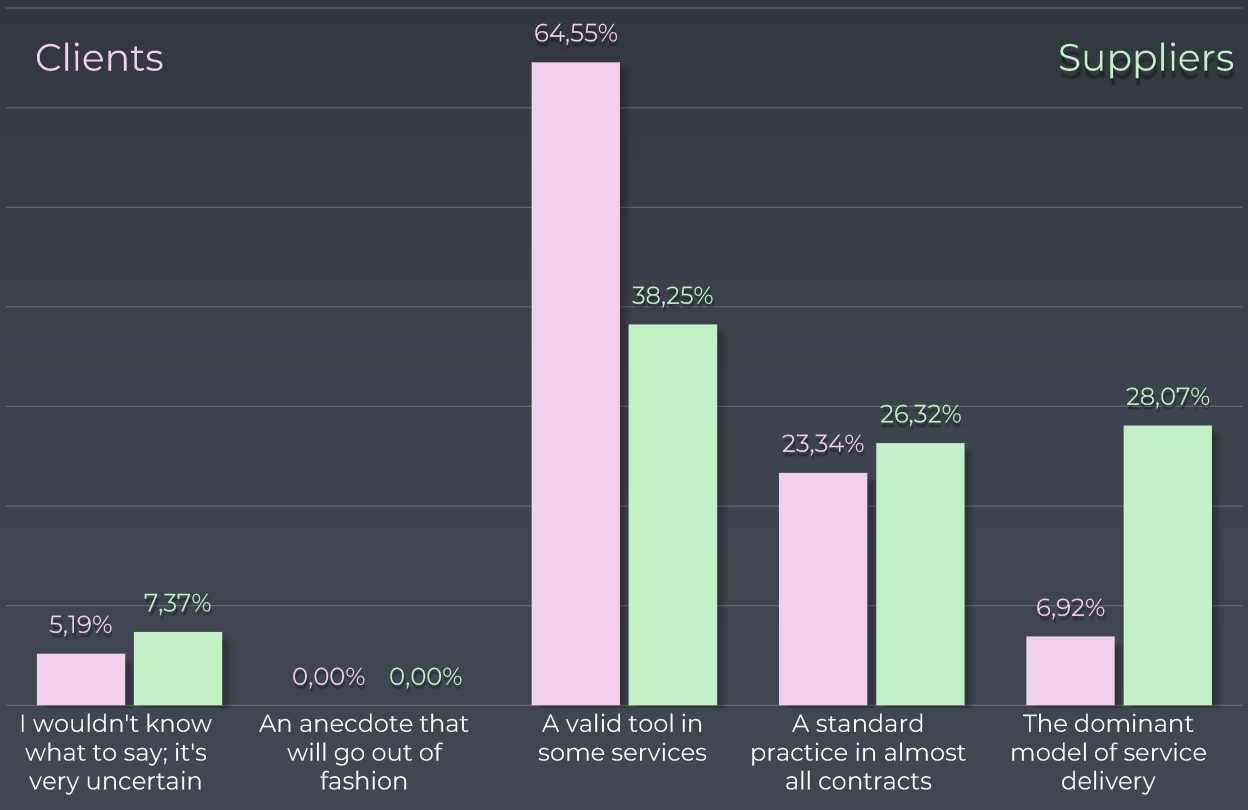
OUTLOOK FOR ROBOTISATION Q5

Five-year vision



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The final question of the survey captures perceptions regarding the future role of robotisation. The chart shows a clear consensus: robotisation is not perceived as a passing trend, and uncertainty is limited. The dominant view is that it will be a valid tool in certain services, particularly among clients. Nevertheless, a significant share of respondents already project robotisation as a standard practice in the majority of contracts, with suppliers standing out for holding a more ambitious view and being more inclined to see it as the dominant model for service delivery.

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