The path to autonomous portfolios

Why managing digital infrastructure is the real bottleneck



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Agenda

What we'll cover in the next 45 minutes

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1 State of the market

2 Solution for autonomous portfolios

3 Why infrastructure first

4 Application at scale

5 SASE, demystified

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State of the market

JLL has a mandate to lead on autonomous portfolios

Scope

5.7B sq ft managed

Objective

Make the most of every real estate asset

Rate of change

5% → 92%

of corporate real estate teams piloting AI, in three years



Client expectations

Holistic building management

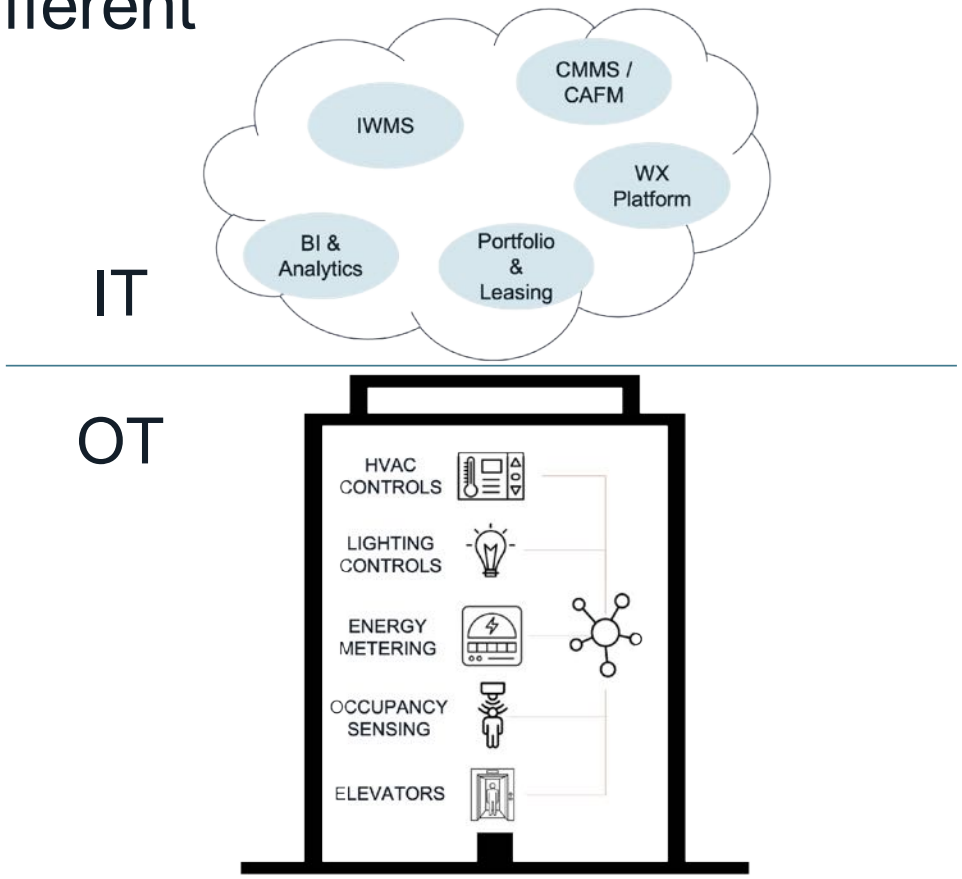
Continuous optimization

Guide the market

State of the market

Real estate technology spans two environments, managed to very different standards

	IT	OT
Management	Disciplined IT mindset	Managed as physical assets and depreciated
Standards	ISO/IEC 27000, ITIL, COBIT, NIST	No digital hygiene standards; only system protocols
Support	Well-defined managed service provider models	Mechanical, electrical, and physical maintenance focus
AI adoption	Rapid uptake, ready to innovate	Lagging: tech debt, poor interoperability, unstructured data
Cyber-security	Well-defined risk models and controls	Risk unknown and untracked; no clear accountability



State of the market

Three forces demand action; three barriers block it

Catalysts

1 Cybersecurity, risk, and compliance



2 AI, automation, and data



3 Asset management is changing



Barriers

Portfolio scale

Data access and quality

Inconsistent management structure

Immature infrastructure

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State of the market

Our hypothesis: fix infrastructure, then mature iteratively

1

Decouple OT infrastructure from product

Solves

Security review times, access to enterprise management tools, adaptive solutioning

2

Develop people and process

Solves

Unicorn problem, affordability, knowledge transfer, scaling and coverage

3

Focus on client outcomes in real estate terms

Solves

Success metrics, relatable commercials, defensible investment criteria

Fix the OT infrastructure problem, mature capabilities through an iterative process

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Solution for autonomous portfolios

Introducing OT Solutions

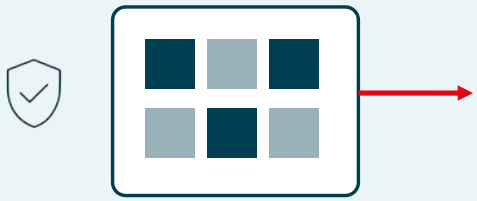
OT Solutions

Enterprise-scale OT managed services for portfolios

Physical maintenance+ | Digital maintenance | Portfolio automation

Breakthrough 1

One glass box, one security review



Year+ → weeks

Breakthrough 2

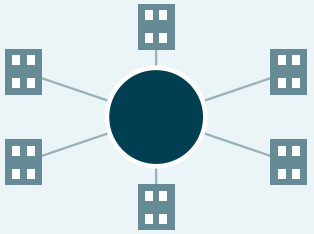
Asset management focus



No visibility → visibility first

Breakthrough 3

Centralized OT support



Right skills for the right job

Solution for autonomous portfolios

Every specialist team was solving the same problem

Before: every team repeats six steps

	1 Survey architecture	2 Determine if data	3 Design extraction	4 Cyber review	5 Install HW/SW	6 Maintain it
Sustainability	1	2	3	4	5	6
Reliability engineering	1	2	3	4	5	6
Smart buildings	1	2	3	4	5	6

After: one managed foundation

Sustainability
Focus: insights into action

Reliability engineering
Focus: insights into action

Smart buildings
Focus: insights into action

OT Solutions
Steps 1-6, delivered once for every team

1 2 3 4 5 6

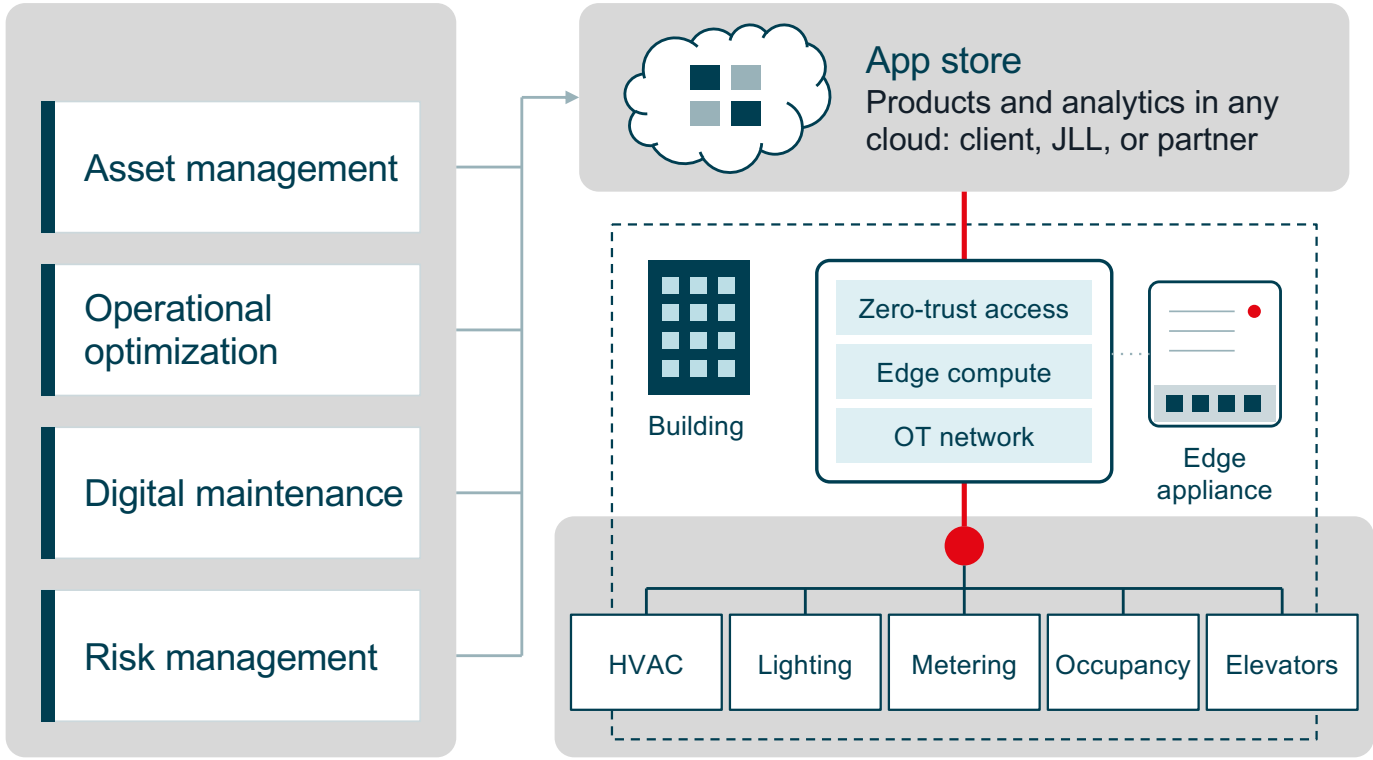
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Solution for autonomous portfolios

A solution that adapts to asynchronous pacing

Real Estate Services

Does not change



Tools & Applications

Change quarterly

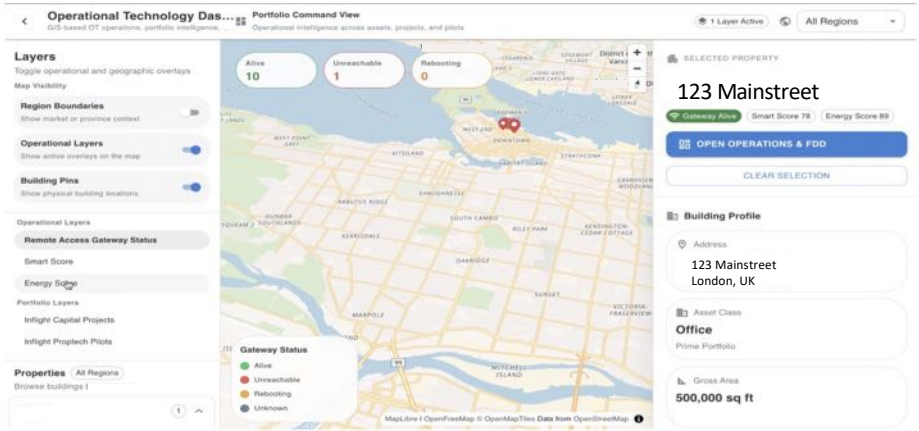
Infrastructure

Changes over years

Solution for autonomous portfolios

Product change accelerates; good data remains the enabler

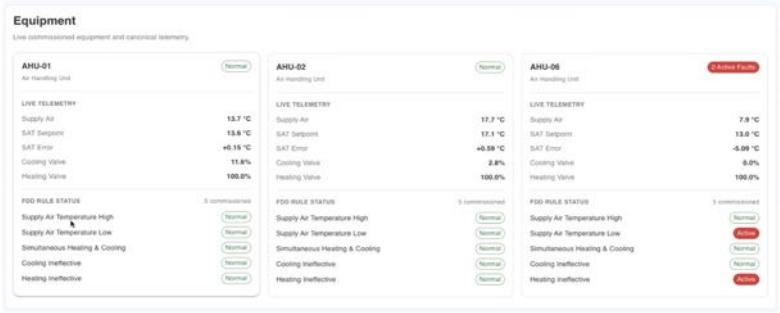
Portfolio command view



Validated data points



Live telemetry and fault detection



“…completely changed how I am thinking about the entire space.”

Ben Cooper
Director of Property Technology
BGO

Why infrastructure first

Core function 1: one secure path from OT to any cloud

Five principles

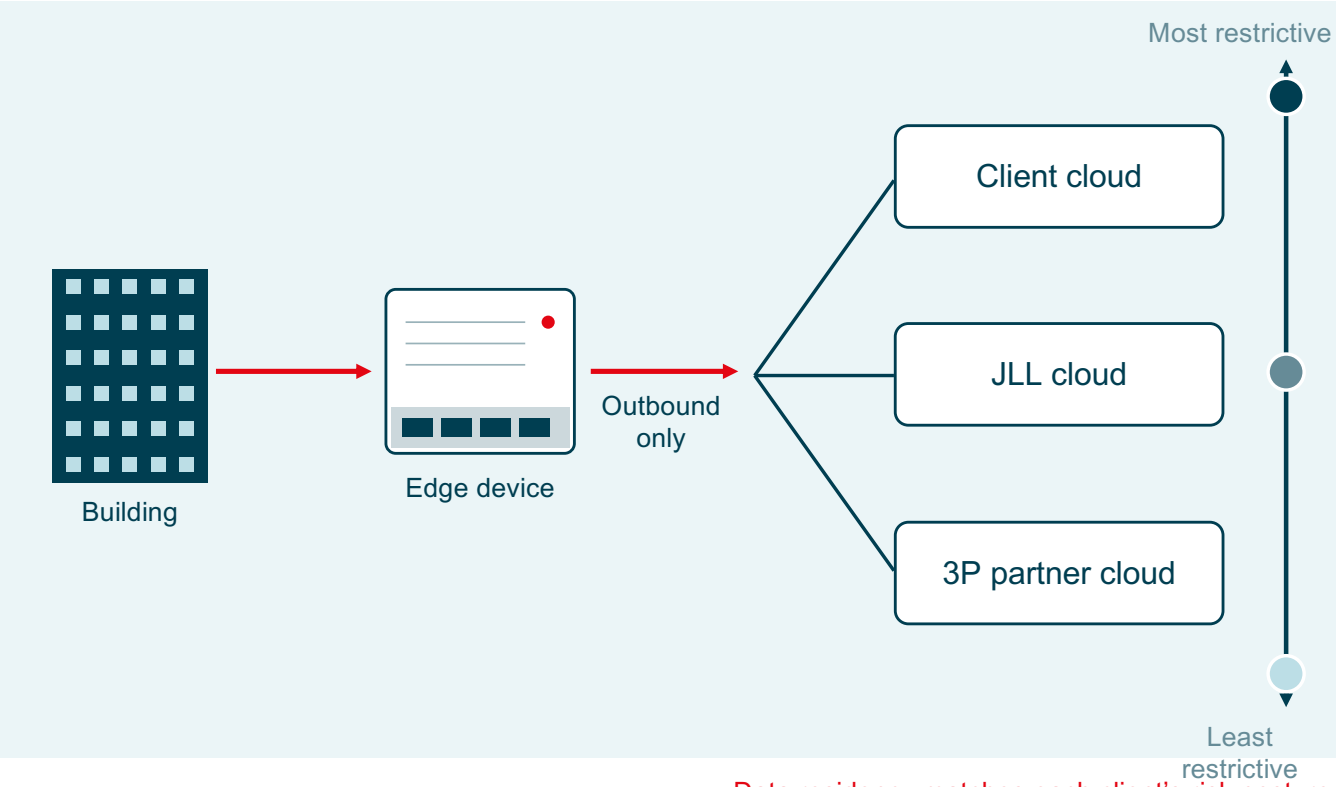
Cloud agnostic
Investments live in different environments

Zero trust
Across all connections and boundaries

Hardened
Outbound-initiated connectivity only

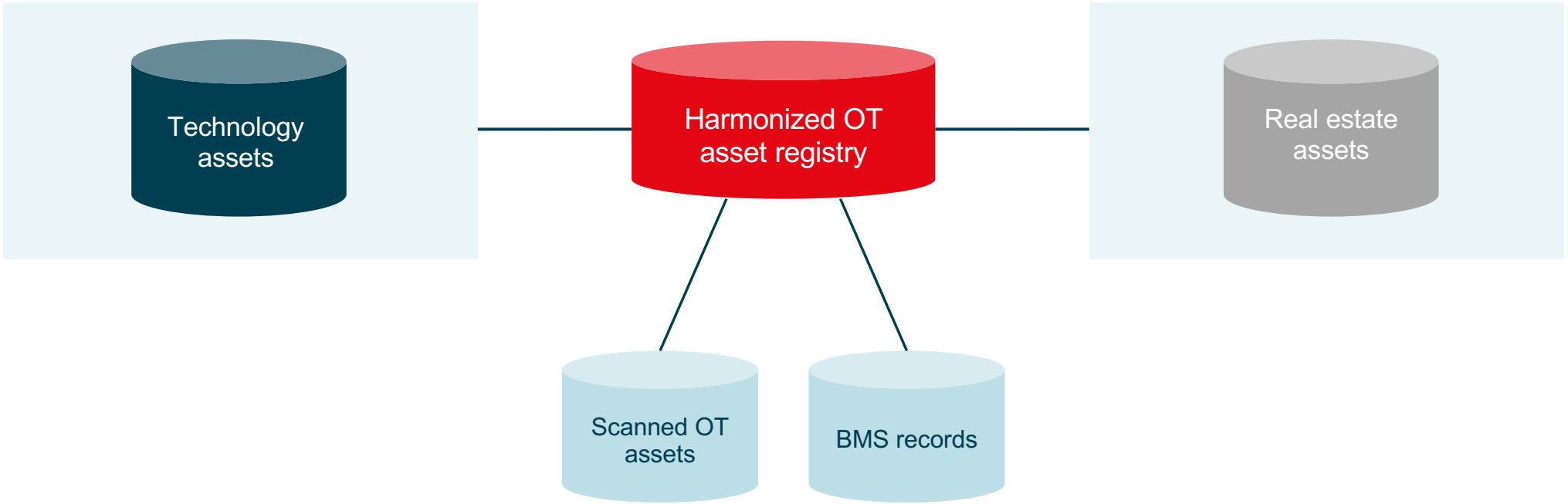
Single source
OT data extracted and transformed once

Controlled
Who has access to what data



Data residency matches each client's risk posture

Core function 2: one trusted asset registry



Application at scale

Nine offerings in four suites, mixed to fit each building

Solution suites aligned to IEC 62443 and NIST 800 frameworks

Services sequenced by business need

Foundation services	Risk management	Physical maintenance +	Digital maintenance
1 Deploy and manage	3 Security and risk assessment	4 Operational analytics (fault detection and diagnostics)	7 Digital asset maintenance and hygiene
2 Asset management, basic		5 Remote operations	8 OT infrastructure management
		6 Asset management, advanced	9 OT product management

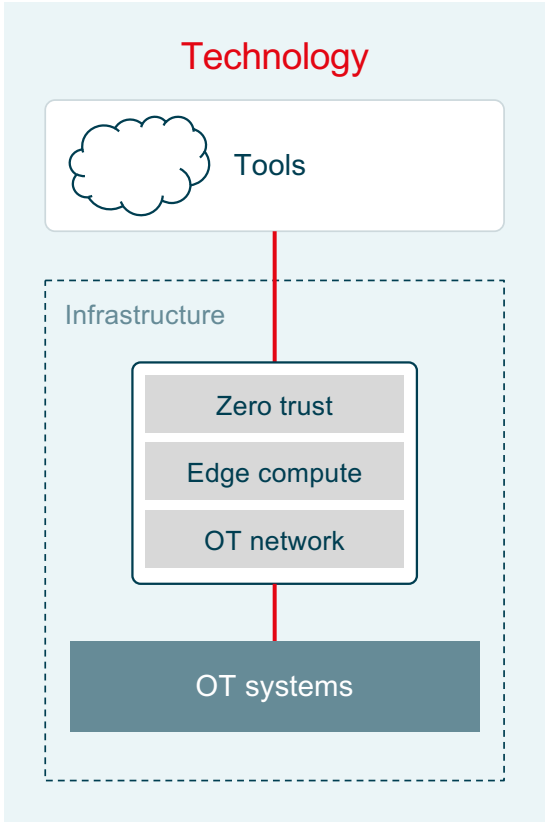
Identify and protect What assets? What risks?

Mature Unlock value and mature digital operations

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Application at scale

One Intelligent Operations Center replaces scarce hires



People and process

Intelligent Operations Center

Centralized operations

Skilled BMS operators run portfolio-level command and control, configuration, and data validation.

Analytics and insights

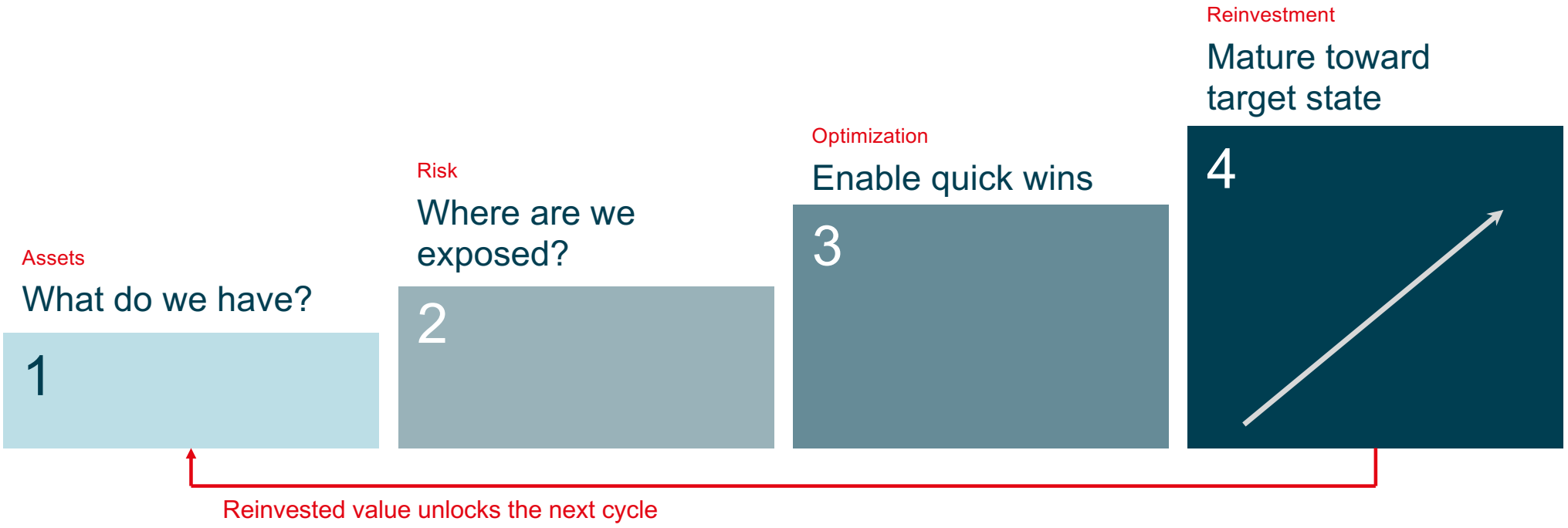
Data analysts interpret building insights and coordinate corrective action with site operators.

Digital maintenance

Systems administration of OT applications: IAM, patching, backups, license and certificate management.

Application at scale

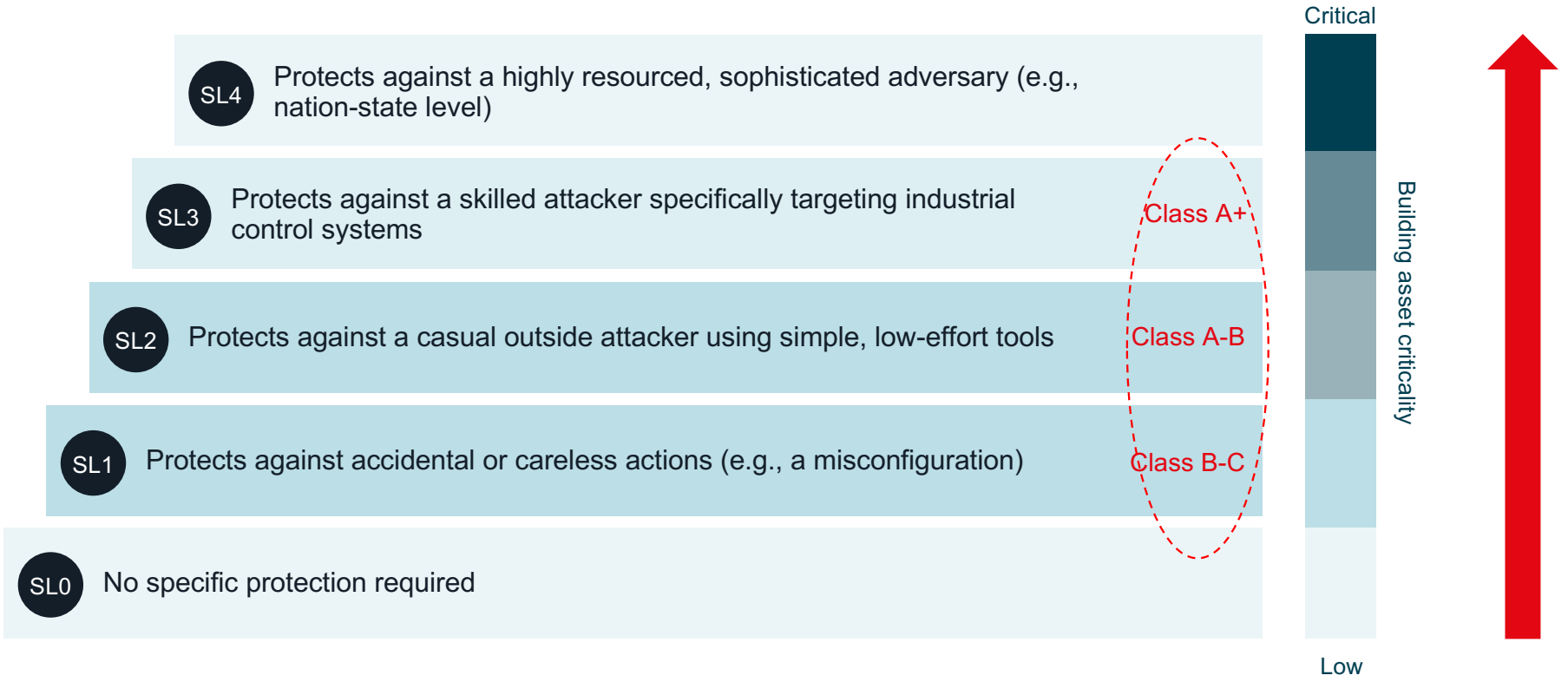
Execute: assets, risk, optimization, reinvestment



Application at scale

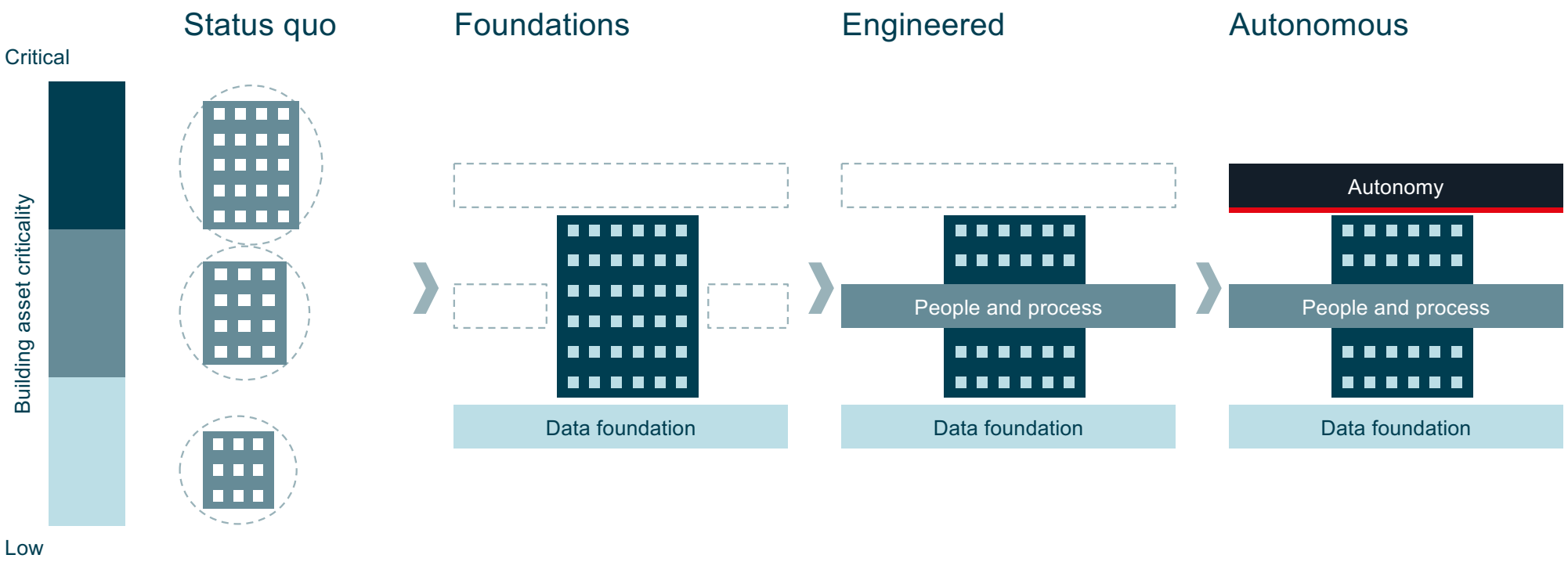
Security targets should match building criticality

Security levels (SLs) are IEC 62443's scale for how well a system withstands a cyberattack



Application at scale

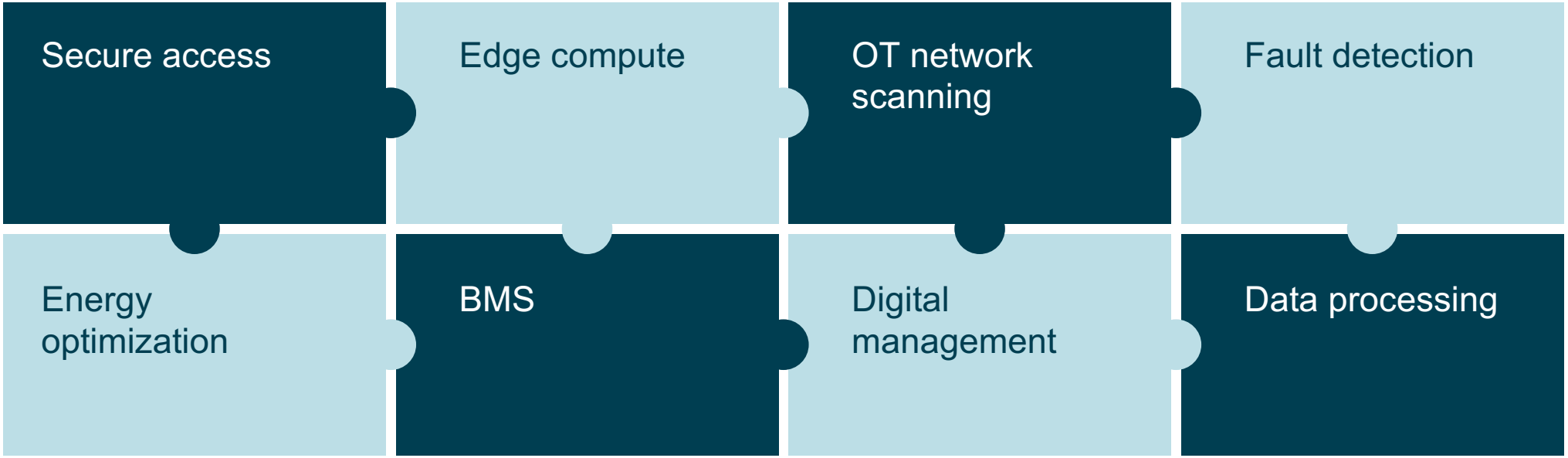
The path: from islands to autonomous portfolios



Each building matures to the target state its criticality demands, one iteration at a time

Application at scale

We didn’t build a stack. We assembled the right pieces.



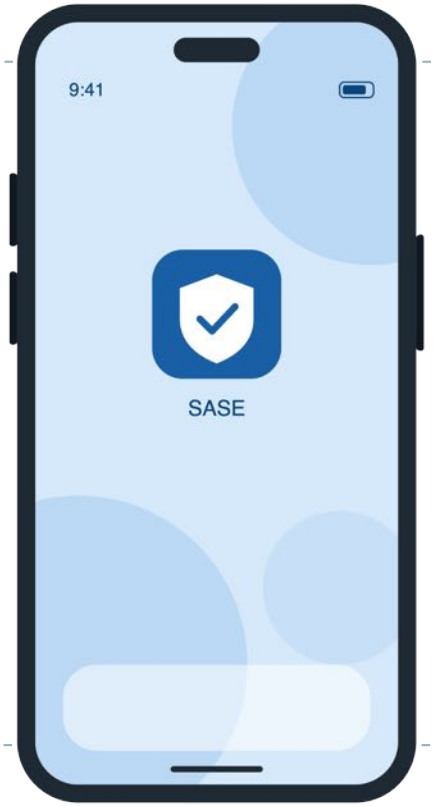
Assembled and operated at JLL scale

Skilled operators choose the right tool for each client’s budget and maturity, across 5.7B sq ft managed.

SASE, demystified

SASE, defined

- Secure Access Service Edge, pronounced "sassy”
- Cloud-delivered architecture that combines wide-area networking with networking security functions…
- All intro a single service
- So users and devices can connect securely, from anywhere



Trevor Pope-Ellis
EMEA Regional Lead
neeve



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SASE, demystified

How does this help you?

Before Neeve:

- Manual Site Visits / Reactive support
- Vulnerable/Unpatched Edge Devices
- VPN/Single-site deployments
- Challenging to deploy *Smart*/*Digital* Initiatives at-scale

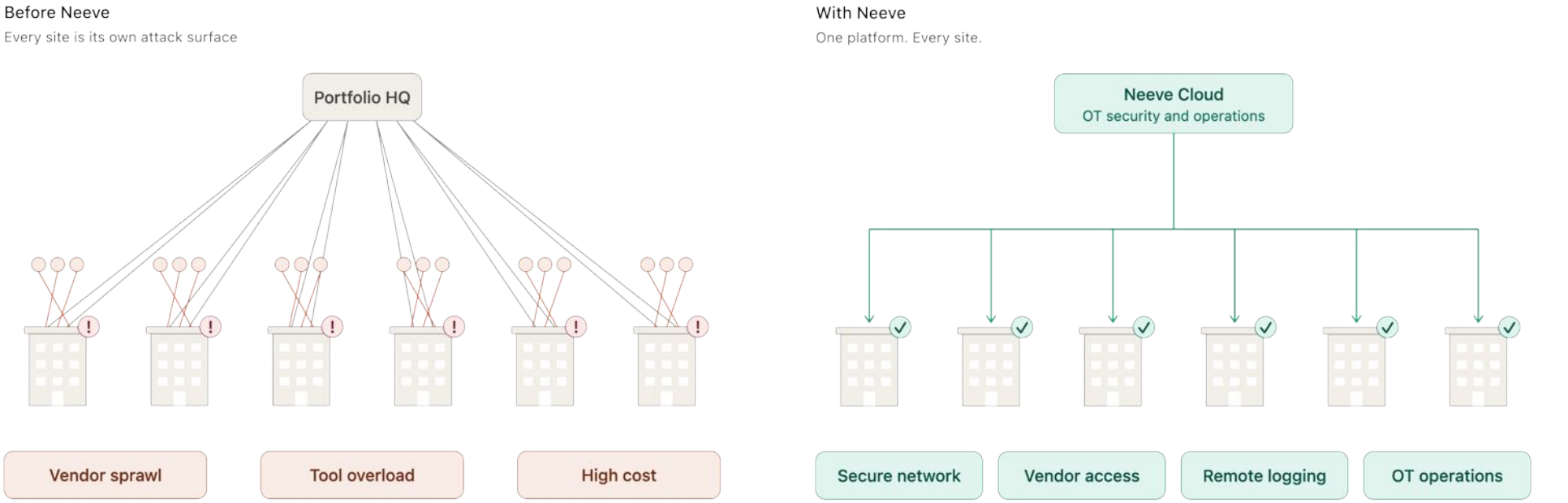
With Neeve:

- Connected device fleet
- Remote orchestration
- Continuous monitoring
- Automated Software delivery & security patching

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SASE, demystified

How does this help you?



SASE, demystified

Improving the Security Process

Delivering Infrastructure at-scale

- NIST: Neeve Secure Edge Feature Alignment
- Secure Lifecycle Development Practices
- Cyber Security Architecture

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SASE, demystified

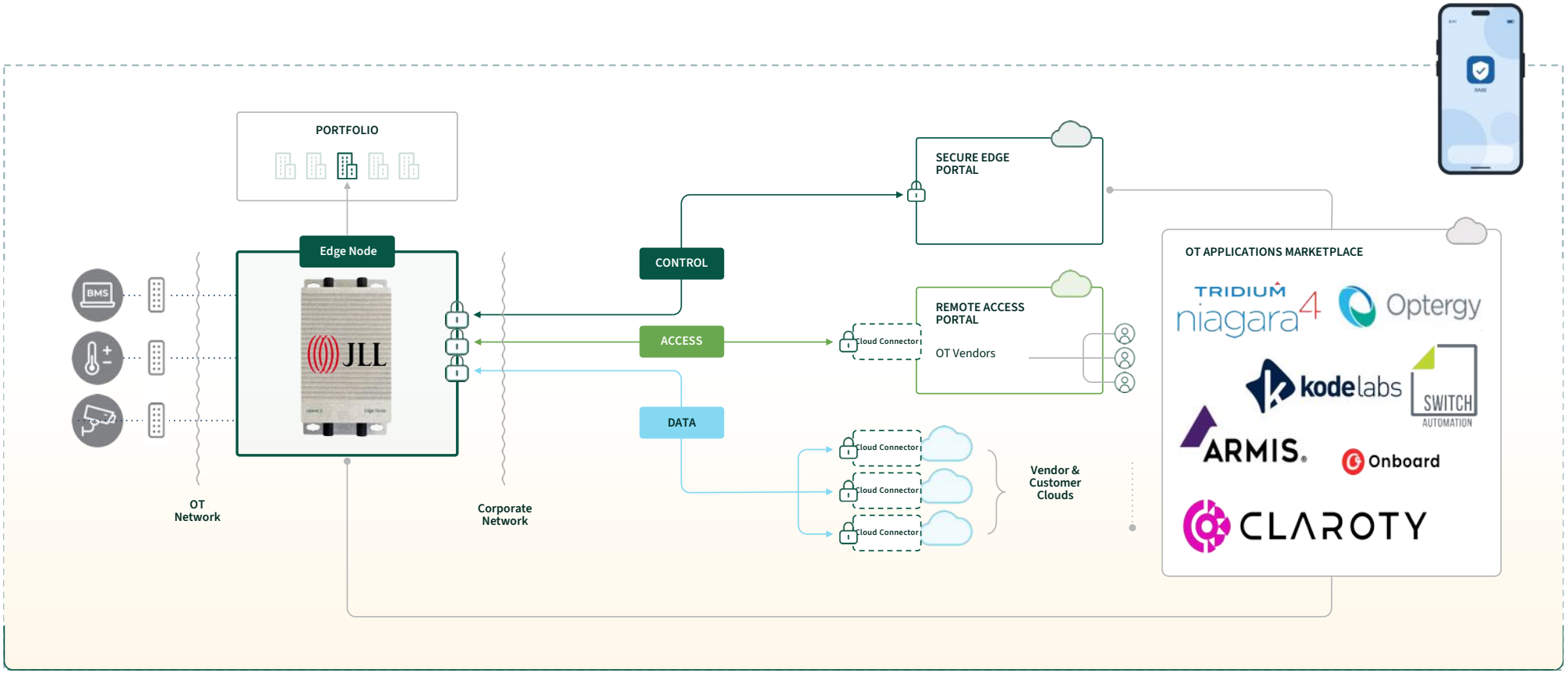
As your needs change…

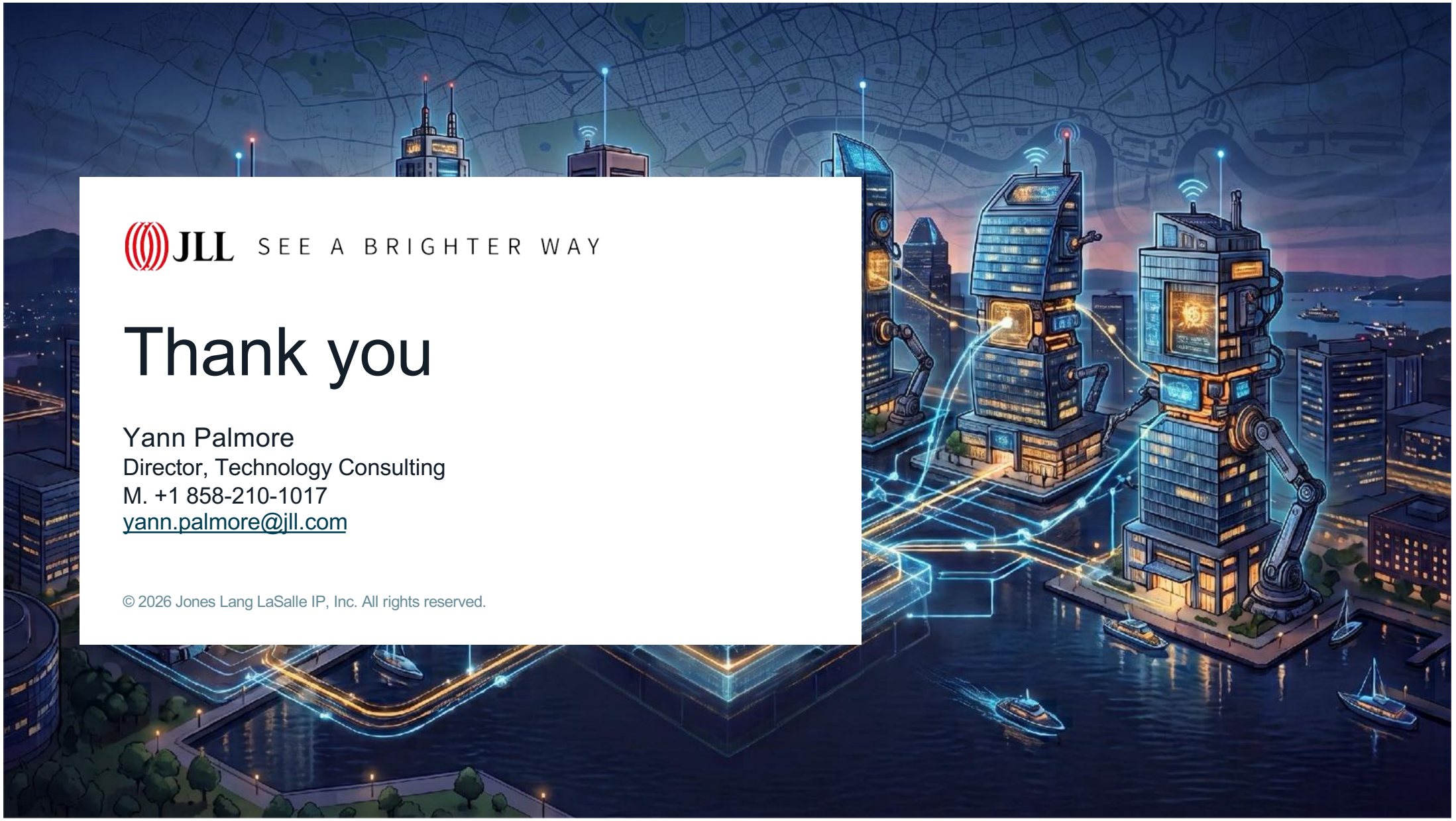
…Reflecting on the JLL “Nine offerings”

- ‘Identify & Protect - What assets? What risks?’
- ‘Mature - Unlock Value and Mature digital operations’

SASE, demystified

As your needs change…





JLL SEE A BRIGHTER WAY

Thank you

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