

## IDC MarketScape

# IDC MarketScape: Worldwide Integrated Workplace Management System 2020-2021 Vendor Assessment

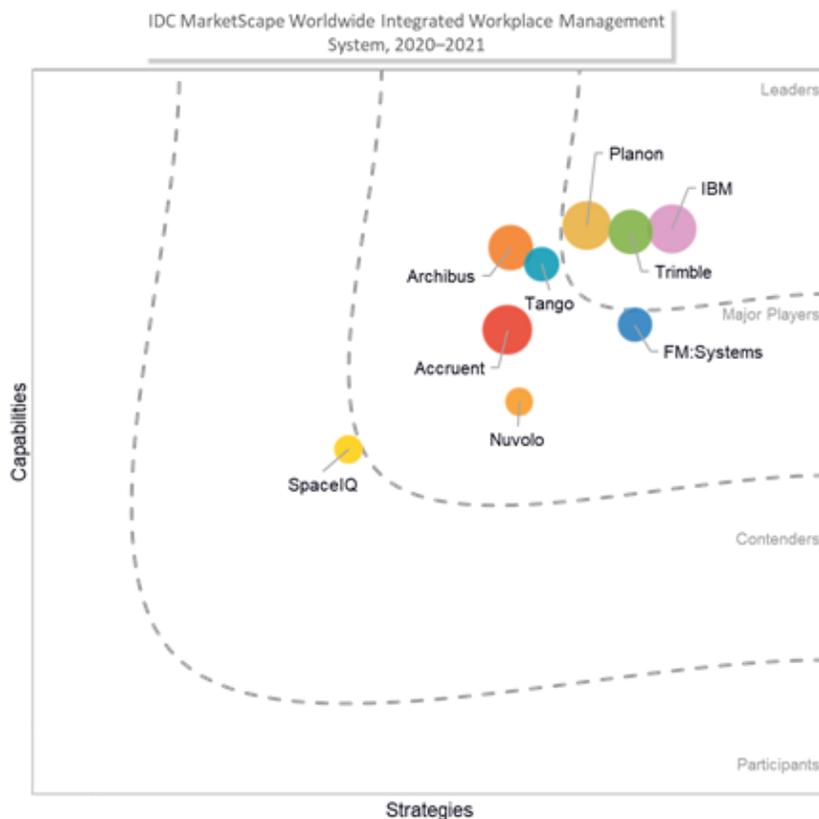
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**THIS IDC MARKETSCAPE EXCERPT FEATURES IBM**

### IDC MARKETSCAPE FIGURE

**FIGURE 1**

## IDC MarketScape Worldwide Integrated Workplace Management System Vendor Assessment



Source: IDC, 2020

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

## IN THIS EXCERPT

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The content for this excerpt was taken directly from IDC MarketScape: Worldwide Integrated Workplace Management System 2020-2021 Vendor Assessment (Doc # US46261420). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

## IDC OPINION

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The intent behind an integrated workplace management system (IWMS) is to bring together capabilities for maintenance management, capital project planning, space management, and real estate and lease administration. This IDC MarketScape helps organizations evaluate the IWMS market landscape. Because the remit for an IWMS is so broad, it's no surprise to see the way organizations deploy these applications and the use cases they care about change over time. It's been quite a journey for IWMS applications.

### Shifting IWMS Priorities

Many organizations have relied on an IWMS to maximize the use of their existing real estate portfolio, optimize space to fit more people, and expand facilities through large capital projects. Customers interviewed by IDC describe a constant tension between using every square inch of space, reducing real estate operating costs, and creating outstanding occupant experiences. Then came the major changes to lease accounting, impacting building and equipment rentals. IASB and FASB issued revised lease accounting standards, which took effect in 2019, that greatly impacted how organizations handle operating leases on their balance sheets. IWMS vendors and customers moved quickly to comply with the revised standards, rewriting accounting modules and releasing critical software updates.

Just as organizations were getting a handle on accounting for leases, they were hit with one of the biggest disruptions to workplaces in decades: the COVID-19 pandemic. Now organizations must prioritize creating safe and productive environments for their employees, students, and customers. In the short term, organizations had to take measures such as allowing a dramatic shift to working remotely where possible, modifying floor plans for social distancing, reducing building capacity, implementing new schedules, and deploying novel technology. Real estate and facility professionals have turned to a variety of "return-to-work solutions" for space reservations, health attestation, contact tracing, proximity monitoring, wayfinding, cleaning, communications, and so on.

How quickly an organization can respond to this and other disruptions is partially determined by the digital maturity of its facility, real estate, and integrated workplace software. Those with an IWMS already in place are able to more easily pivot than those still relying on spreadsheets or outdated systems. Organizations now realize they need a digital transformation strategy for facility management. IDC's worldwide *COVID-19 Impact on IT Spending Survey* (conducted August 26-September 6, 2020) data shows that two-thirds of companies are investing in automation related to their facilities in 2020 and 2021.

What role do IWMS applications play moving forward? Organizations need to look at the long-term plan for workplaces, campuses, facilities, and retail outlets with an emphasis on flexibility and resiliency. That process starts with compiling and analyzing facility, maintenance, space utilization, environmental,

capital project, and real estate and lease data. What becomes abundantly clear is that multiple departments and user types across the organization need access to the same information and insights. A modern SaaS and cloud-based IWMS can help orchestrate faster data-driven enterprisewide decision making and actions compared with siloed, disjointed, and sluggish legacy systems.

## Fully Leverage Integration

The objective behind an IWMS is to bring together disparate functions and data sets onto one system to reduce duplication, share information, make decisions collaboratively, and standardize and automate workflows. With so much functionality in one application, it takes both technical integration and organizational commitment to extract the full value of being on a single IWMS. Some departments resist centralizing workplace applications because they want to continue using vendors that they believe better support their particular requirements. Customers interviewed said that the biggest internal challenge was the need to please such a diverse set of constituents across the different functional areas covered by an IWMS.

As a result, customers often described using their main IWMS for two to three disciplines while solving other use cases with purpose-built solutions or modules from other IWMS vendors. For example, an organization might use its primary IWMS for real estate and lease administration and separate point solutions for space reservations, space utilization, and maintenance management. With modern APIs to link up systems, this method can work fine in some instances. However, organizations taking this piecemeal approach are less likely to generate connected, enterprisewide insights about their physical environments. An IWMS by its nature covers a broad spectrum of users with competing demands on the product, and it is often a balancing act to fully leverage the investment.

Here are a few key characteristics of IWMS applications to consider:

- **SaaS and cloud adoption:** Digitally fit organizations are increasing their investments in cloud IWMS applications for ease of deployment, configurability, and scalability. When the COVID-19 pandemic disrupted businesses, organizations already deploying cloud applications found they could quickly adapt to new conditions, access critical business information, and immediately leverage new tools and apps released by technology vendors.
- **Contactless workflows:** A likely lasting impact of the COVID-19 pandemic is reducing close human contact and shared objects in workplaces to improve occupant health and safety. Organizations must decide if and how to upgrade assets, systems, and workflows to touchless and contactless alternatives and how their IWMS vendor enables this process. For example, when it comes to visitor management, plan for guests in advance, ensure guests comply with company policies, and streamline a contactless check-in and check-out process.
- **Autonomous tasks:** There is much room to automate lower-level tasks and manual processes. Organizations must look for areas where users are still performing significant data entry or leaving the IWMS to complete a task, such as updating seating charts or work order creation. Explore robotic processing automation (RPA), computing vision, and natural language processing for capturing, recording, and interpreting structured and unstructured data. Forward-thinking organizations are looking for applications that easily handle their unique workflows now and in the future.
- **Information capture:** In addition to creating efficiencies, automation reduces the impact of human error and missing information. In traditional systems, useful information is lost because it may be too inconvenient for a person to manually enter data into the right place. In a single day of operating a facility, information from corporate real estate, maintenance, IT, HR, contractors, suppliers, employees, customers, and others is passed around by phone, email,

text, messaging systems, documents, pictures, and face-to-face conversations. An innovative IWMS helps capture and store more of this information in a machine-readable format.

- **Human-centric mobility:** 2020 has given mobility a new flavor and broadened the need across additional roles and tasks. IDC predicts that by 2022, 75% of organizations will use mobile solutions to improve unstructured data collection at the point of activity, better support remote/hybrid workers, and optimize resource productivity. Further, organizations have new mobile requirements around user experience, virtual assistants, and voice interfaces. IT also needs to ensure mobile tools are reliable and secure, especially given an anticipated increased reliance on mobile as companies move to hybrid work models.
- **Mobile functionality scope:** Most IWMS vendors have native mobile apps and mobile-friendly web tools geared toward end-user needs, like booking conference rooms or requesting services. Those with fully functioning maintenance management modules may have a mobile solution for technicians to track work, access building and asset information, and record progress. Customers note that, across the board, IWMS vendors are missing opportunities to provide mobile solutions for the real estate, lease administration, capital planning, and project management side. Consider whether the product provides access to floor plans, maps, property details, and lease information when workers are out touring facilities.

## IDC MARKETSCOPE VENDOR INCLUSION CRITERIA

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The vendor inclusion list for this evaluation was selected to accurately depict the vendors that are most representative of any given IWMS on buyer's selection list based on the following:

- The vendor must have a SaaS or cloud offering – on premises-only applications are out of scope.
- The IWMS can be purchased separately (not only functionality built into a larger system) and is available off the shelf without required customization.
- The IWMS has capabilities for maintenance management, capital project planning, real estate and lease management, and space management.
- The vendor had 2019 revenue in at least two geographic regions.
- The vendor had at least \$10 million in 2019 facility management software revenue.
- The vendor must have minimum of one IWMS in market for at least three years.

## ADVICE FOR TECHNOLOGY BUYERS

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IWMS applications are evolving rapidly as vendors invest research and development dollars into bolstering, augmenting and, in some cases, redesigning their software. As a result, it is extremely important for end users to understand how vendors and their software are positioned currently as well as how an IWMS may be situated in the next three to five years. Organizations typically make a multiyear commitment to their IWMS applications because the costs to migrate the data, configure and customize workflows, integrate with adjacent systems, and train a broad user base is too high. Thus it is vital to evaluate the software vendor's strategy, road map, and responsiveness to customer feedback in addition to the vendor's present features and functionality.

Innovation is an essential part of the "buy" decision, so a guiding factor in our vendor research was the 3rd Platform and innovation accelerators' current capabilities in addition to the strategic direction. Buyers are looking for a technology partner that can rise to the complex, agile, and remote management needs,

which this time demands, as well as take them into the future. Several vendors outlined in this study have focused their IWMS on specific industries, while others serve organizations across many verticals such as corporate offices, retail, healthcare, education, or public sector. The vendors vary in terms of size, experience, levels of support, sales model, and focus on the market.

Following are a few key steps in the journey to select the right fit among the myriad of software vendors:

- **Understand your needs.** Before you choose your IWMS vendor and product, you should first take the opportunity to do some self-reflection. Watch out for technical debt and paying for more than you need. Think about how well featured the product really needs to be for your organization. A few key questions to ask regarding the internal factors involved in choosing software are:
  - What is our strategy for managing and maintaining workplaces and facilities as well as the teams that implement those activities?
  - Are we looking to better define or improve our processes as we implement new technology?
  - What aspects of workplace management do we want to digitally transform first, and what features do we consider essential now?
  - How has the COVID-19 pandemic changed or restructured our business?
  - What industry-specific considerations apply to our software selection?
  - How many and what types of users will interact with the software, including consideration for ways in which third-party contractors will interact with the application?
  - How much are we willing to spend on the software?
  - Will we be doing a new installation (greenfield) or migrating (brownfield) from existing applications to a new application?
  - What are the deployment models we are using now, and are we planning on shifting?
  - What are the organization's internal support resources and capabilities?
- **Do your research.** With so many options, organizations must take a systematic approach to researching and vetting software packages. Tap into the vast web of software evaluation options including market research firms, online review sites, and industry associations. A few key questions to ask when researching the software are:
  - Does the vendor have experience in successfully implementing an IWMS in our industry and company size?
  - Is the vendor knowledgeable about applicable regulations and guidelines, both locally and globally, as they affect our company?
  - What levels of support are available, and can the vendor or partners support all the geographic regions where we operate?
  - Is the ROI achievable? Does the vendor have a track record of meeting the ROI requirements?
  - Can the vendor integrate with our organization's other IT systems?
  - Is the product available anywhere and anytime?
  - What mobile capabilities does the vendor offer for the different user groups?
  - Does the software come with artificial intelligence (AI), machine learning (ML), robotic processing automation, virtual assistant chatbots, or natural language processing?

- What purchasing, pricing, and cloud deployment options does the vendor offer?
- How long does it take to implement the software? How quickly can we start using the product?
- Do we need an outside consultant to help with deployment? Is there self-training available for our team?
- What type of in-house IT resources do we need to have available, if any? Or are we reducing internal resources and datacenter by moving to the cloud?
- **Look to the future.** Workplace management teams are adopting more innovation for efficiency, autonomy, and competitive advantage. Organizational agility is critical when purchasing software as the applications and vendors must be able to scale up to support your growth or scale back if business may need to slow down. A few key questions to ask when considering the growth aspect of choosing a software package are:
  - Is the product updated frequently enough for our needs?
  - What new innovations is the vendor offering or considering, especially with regard to deployment options, IoT, mobility, and location-based services? How and when will it impact my business?
  - When will new digital transformation use cases be built out in the product, and what impact will it have on return-to-work and future workplace outcomes?
  - What is the vendor's strategic investment outlook for the next three to five years? Why? How will that change and enhance my business?
  - Will the vendor be a partner, helping our business grow now and in the long term?

This IDC MarketScape vendor assessment assists in answering the aforementioned questions and others. The goal of this document is to provide potential software customers with a list of IWMS vendors that have taken great strides to incorporate the previously listed capabilities. We have profiled and assessed their capabilities to support the broad needs of an IWMS.

## VENDOR SUMMARY PROFILES

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This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

### IBM

After a thorough evaluation of IBM's strategies and capabilities, IDC has positioned the company in the Leaders category in this IDC MarketScape for integrated workplace management system.

IBM TRIRIGA is an enterprise suite of integrated workplace management system applications that helps organizations manage their workplace experience. IBM TRIRIGA functionality spans space management, lease administration and accounting, real estate management, capital projects, facility condition assessment, maintenance management, environmental and energy management, and asset disposition. It helps customers manage space, return to work, and sustainability efforts, including carbon accounting, environmental investment analysis, and financial and environmental impact assessments to inform capital planning and identify potential equipment maintenance.

IBM TRIRIGA Assistant delivers a natural language AI chat interface to enable occupants to book meeting rooms, submit service requests, and view floor plans. TRIRIGA integrates with Esri ArcGIS

Indoors and Apple Indoor Maps for indoor mapping and wayfinding. IBM TRIRIGA Building Insights, part of the IBM TRIRIGA suite, collects occupancy data (i.e., sensors, Wi-Fi, badging systems), performs robust space utilization analytics, and enables data-driven decision making for facility and space managers. IBM Watson Works combines TRIRIGA with capabilities from IBM Watson Health and IBM Maximo products to enable companies to safely and effectively execute programs to return to the office amidst the COVID-19 pandemic. IBM TRIRIGA's Application Platform provides customer configuration capabilities without changes to source code because of a single set of web-based, design time, and runtime components.

Quick facts about IBM are as follows:

- **Employees:** Approximately 350,000 overall
- **Globalization:** IBM TRIRIGA is deployed in over 120 countries and available in 22 languages
- **IWMS partners:** 160+ IWMS technology partners and certified business partners that offer implementation, consulting, and software sales services
- **IWMS industry focus:** Retail, financial services, technology, higher education, public sector, healthcare, manufacturing, energy, transportation, facility service providers, and more
- **Ideal IWMS customer size:** Upper midmarket to large enterprises with multiple leased or owned facilities across different geographies
- **Cloud:** Single-tenant SaaS, private, or hybrid deployments on the IBM Cloud, Amazon Web Services, or Microsoft Azure or on premises
- **Mobile:** Delivered through responsive web apps and designed to be used on a mobile phone, tablet, or laptop via a web browser
- **Pricing model:** SaaS monthly subscriptions based on number of users or perpetual licensing for on premises

## Strengths

- **Industry expertise:** IBM TRIRIGA has been delivering IWMS applications for nearly three decades. IBM runs active customer advisory boards by industry. TRIRIGA's expertise manifests itself in the depth of capabilities and implementation experience. Customers note IBM's quick adaptation to the changing lease accounting rules as an example of the company's strong domain expertise.
- **Functionality and flexibility:** Customers note the flexibility of IBM TRIRIGA as one of the reasons for selecting and continuing to use the system. IBM TRIRIGA is a highly configurable IWMS with broad functionality and deep competencies in space management, maintenance, capital projects, real estate, and leasing. IBM TRIRIGA offers both lease accounting and environmental sustainability capabilities, two areas that are not often found together in one suite.
- **Innovation:** IBM Watson AI and other company innovations help the vendor respond to market changes with new solutions. IBM TRIRIGA Building Insights is a standout IoT solution for enterprise customers seeking smart building innovations. Further, IBM was able to quickly bring to market a new return-to-work offering, IBM Watson Works, by assembling software components from across the company, with TRIRIGA as the centerpiece.

## Challenges

- **Microservice transition:** TRIRIGA is currently delivered in single tenancy on the IBM Cloud without a microservices architecture. On the basis of an executive briefing, IBM has plans to

"containerize" each agent, enabling the applications to scale more dynamically via OpenShift containers. This will also enable customers to run TRIRIGA on compatible cloud platforms.

- **End-user experience:** The other side of having a powerful and configurable system is that it can be complicated for end users. Customers note that tasks sometimes take too many steps to execute, and finding information requires navigating through several screens. Users recognize and appreciate IBM's recent improvements to the user interface and look forward to planned upgrades on the road map.
- **Purpose-built applications:** IWMS vendors face competition from purpose-built applications designed to solve specific workplace management use cases. Recently, new applications have launched to address new needs arising from the COVID-19 pandemic. One of IBM's challenges is helping customers realize the ways TRIRIGA can help meet multiple, changing needs in the face of new return-to-work software options. IBM must continue to focus on relationship building, thought leadership, and demonstrating the value of a holistic system from one vendor over point solutions from many providers.

### *Consider IBM When*

Consider IBM when you are an enterprise with a large real estate portfolio. You are likely looking for a flexible IWMS with deep functionality from a company with extensive experience in the industry.

## APPENDIX

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### Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

### IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of a review board of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

## Market Definition

Facility management applications are software that supports the maintenance and operational profile of assets and systems directly tied to the functionality of buildings and related outdoor sites. An integrated workplace management system (IWMS) enables building owners and occupants to manage day-to-day operations and long-range planning of buildings and facilities. An IWMS combines functionality across multiple facility and workplace management disciplines, including:

- **Maintenance management** manages facility maintenance work orders, plans preventive maintenance, and tracks related inventory.
- **Capital project management** organizes and evaluates capital investments for construction, refurbishment, and renovations; manages capital project timelines; and assists with related bidding, budgeting, and accounting.
- **Real estate and lease management** is capable of storing, visualizing, and analyzing real estate portfolios and supports lease administration.
- **Space management** provides data, tools, and analysis for space utilization and planning and enables space reservation by end users.

## LEARN MORE

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### Related Research

- *IDC FutureScape: Worldwide Intelligent ERP 2021 Predictions* (IDC #US45753520, October 2020)
- *Market Analysis Perspective: Worldwide Enterprise Asset Management Applications, 2020* (IDC #US45754420, September 2020)
- *IDC TechScape: North America Safe Return-to-Office Technologies, 2020* (IDC #US46788820, September 2020)
- *COVID-19 Brings Task Applications to the Enterprise* (IDC #US46851820, September 2020)
- *IDC's Worldwide Digital Transformation Use Case Taxonomy, 2020: Facility Management* (IDC #US46439320, August 2020)
- *IDC PlanScape: Intelligent Space Management* (IDC #US46738820, August 2020)
- *Worldwide Enterprise Asset Management Applications Forecast, 2020-2024: Intelligent EAM* (IDC #US45244220, June 2020)
- *Worldwide Enterprise Asset Management Applications Market Shares, 2019: Year of Innovation Accelerators* (IDC #US45244020, June 2020)
- *Accelerate Facility Management with Intelligent Automation* (IDC #US46131820, March 2020)
- *IDC Market Glance: Facility Management Software, 1Q20* (IDC #US46162520, March 2020)

### Synopsis

This IDC study provides an assessment of prominent integrated workplace management system (IWMS) vendors and discusses what criteria are most important for companies to consider when selecting an IWMS software solution.

"Organizations need a robust set of workplace management tools to give them the flexibility and resiliency to manage through and beyond the COVID-19 pandemic. Unfortunately, too many organizations are missing the point of having an integrated workplace management system and are

using an assorted collection of applications," says Juliana Beauvais, research manager, Enterprise Applications at IDC. "Fully leverage all the capabilities of an IWMS to create a long-term strategy for your organization's workplaces, campuses, facilities, and retail stores."

## About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications and consumer technology markets. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. More than 1,100 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For 50 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company.

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