Smart Buildings

Green Quadrant: Workplace Systems Integrators 2023

By Joy Trinquet
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This report provides a detailed, fact-based comparison of the 12 most prominent workplace systems integrators available in the market. Workplace systems integrators provide consulting and implementation services for various technology and software solutions to help clients improve workplace productivity, employee experience and building efficiency. Based on the proprietary Verdantix Green Quadrant methodology, our research spanned 90-minute live briefings, customer interviews, vendor responses to an 82-point questionnaire and data from a survey of 350 real estate decision-makers. The analysis finds that the leaders in the market are offering comprehensive systems integration services that enable their customers to get value from multiple technologies, including integrated workplace management systems (IWMS), workplace mobile apps and Internet of Things (IoT) technologies. The evaluation of service provider capabilities and market momentum reveals that five firms — Accenture, Cognizant, Deloitte, EY and JLL — currently lead the market, while other providers have strong capabilities in specific areas, such as access control, operational technology systems and energy management. Real estate executives and landlords should use this report to help them select the implementation partner best suited to meet their workplace needs.

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Organizations mentioned

Accenture, Advanced Technology Group (ATG), Albertsons, Amazon, AMS Workplace Technology, AppSense, Arabesque, Archibus, AREMIS, Atos, Atrius, Autodesk, AVC, AVEVA, AWS, Basking, BGIS, Building Engines, Butlr, CAFM Resources, CBRE, CBRE|ESI, Cenero, Chevron, Cisco, City of Dallas, CleanRobotics, Cognizant, Comfy, Commuty, Condeco, Content+Cloud, Corelia, CoreNet, CrowdComfort, Cushman & Wakefield, Deloitte, Deloitte Digital, Disruptive Technologies, easyJet, eCIFM Solutions, EcoVadis, Edmonton Public School Division (EPS), Enlighted, Envio, Envizi, Eptura, EvoEco, Evolve FM, EY, FieldFLEX, Fisheries and Oceans Canada, Flannery Plant Hire, FM:Systems, Foncière Magellan, Fortune, Freespace, Fresno Unified School District, General Electric (GE), Google, Government of Saskatchewan, Grafana, GSK Vaccines, Haltian, Hammersmith and Fulham Council, Hank, HELLA Aglaia, Hewlett Packard Enterprise, Honeywell, Horizant, House of Commons of Canada, HqO, HubStar, Hydro Ottawa, IAdea, IBM, IM Group, Impec Group, Infogrid, Informa, Integrated Environmental Solutions (IES), Intelex, International Facility Management Association (IFMA), International Organization for Standardization (ISO), iOFFICE, JLL, Johnson Controls (JCI), KODE Labs, KPMG, Locatee, LocusLabs, MACRO (a Savills company), Mapsted, Metrikus, Microshare, Microsoft, Midlands Engine Investment Fund, Modo Labs, MRI Software, National Research Council Canada, Nordomatic, NTT DATA, Nuvolo, OccupEye, OpenAI, Orange, Palantir, Pamafe IT, Paradise Birmingham, Paris Aéroport, PFH Technology Group, Planon, PointGrab, Portland Public Schools, PTC, Pure AV, PwC, Raet, Relogix, Rentacrate, Richard L Hoffman and Associates, Ricoh, ROI Consulting Group, Royal Institute of British Architects (RIBA), SAP, Schneider Electric, ScreenCloud, Serraview, ServiceNow, Snowflake, Sodexo, SoFi Stadium, SpaceIQ, Spica Technologies, SwiftConnect, Tango, TATA Consultancy Services, The Clarient Group, ThingWorx, Toogethr, Tridium, UBS, University of Nebraska-Lincoln, US Federal Reserve System, Vanti, VergeSense, Visma, VMware, Wipro, World Bank, Wx Solutions, X20, Xovis, XY Sense, Yardi, Yondr, Z#BRE.

The state of the workplace systems integration market

Workplaces have changed dramatically over the past five years. The role workplaces play, the way employees use them, their designs and the services offered within these spaces have all come into question. Stakeholders involved in workplace decisions have expanded from facilities management (FM) to include C-Level executives and new job titles, such as Head of Workplace Experience.

Workplace systems integrators help firms deploy technology solutions that aid staff productivity, workplace engagement and overall building efficiency (see Verdantix Buyer's Guide: Workplace System Integrators (2022)). Over the past two years, workplace system integration services have attracted growing customer demand as corporate organizations scrambled to adapt to the sudden and evolving needs of the new hybrid working era. Real estate executives must create seamless links between multiple IT systems in their workplace technology stacks to enable hybrid workplaces. This report updates our previous Green Quadrant report, published in May 2021 (see Verdantix Green Quadrant: Workplace Systems Integrators 2021).

This study provides the individuals responsible for selecting, implementing and deriving value from workplace technology with a detailed benchmark to help them select the provider best suited to meet their needs. It analyses each workplace systems integrator's ability to provide IT and business consulting services, and to deliver systems integration and support services across five distinct technology categories: 1) access control, 2) workplace hardware and connectivity, 3) real estate and workplace platforms, 4) real estate and workplace point solutions, and 5) workplace IT (see **Figure 1**). The research for this report answers specific supplier selection questions, primarily:

- **What is the current state of the workplace systems integration market?**
- **How can workplace systems integration services support my wider smart building or workplace strategy?**
- **Which providers lead the market for systems implementation services?**
- **Which providers can best meet my firm's requirements?**
- **How will the workplace systems integration market develop in the near future?**
- **What factors indicate that a workplace systems integrator is a reliable partner for the future?**

To answer these questions, Verdantix assessed 12 workplace systems integrators through an 82-point questionnaire, a 90-minute briefing with participants and interviews with more than 15 customers across a range of industries. We also analysed our global survey data sourced from hundreds of real estate executives to understand their real estate priorities and technology investment plans. The resulting analysis is based on the proprietary Verdantix Green Quadrant methodology, which was designed to provide an evidence-based, objective assessment of suppliers providing comparable products or services.

Figure 1

Service lines and technology categories evaluated

Service line	Services and technologies
IT & business consulting services for workplace systems	Requirements-gathering and vendor selection
	Technology business case development
	Business process design and improvement
	Organizational change management and governance
Access control	Access control systems
Workplace hardware & connectivity	IoT sensors & IoT connectivity
	Digital signage
	Operational technology (OT) integrations
Real estate & workplace platforms	IoT platforms
	Building digital twins software
	CAFM/IWMS/connected portfolio intelligence platforms (CPIP)
	Energy & sustainability management software
Real estate & workplace point solutions	Lease management software
	Capital project management software
	Workplace management systems
	Workplace mobile apps
Workplace IT	Cloud collaboration tools
	Unified device management
	Mobile device support and management
	Remote intranet access management

Note: IoT stands for Internet of Things, CAFM stands for computer aided facility management and IWMS stands for integrated workplace management system.
Source: Verdantix analysis

The scope of workplace systems integration continues to broaden

As a result of changes to the workplace, the landscape and demand for workplace systems integration have expanded significantly in recent years. Buyers need to be aware of the direction in which the market is moving to be able to take advantage of it. Traditionally, workplace systems integrators have helped customers adopt specialist solutions and integrated workplace management system (IWMS) platforms. In recent years, workplace systems integrators have:

- **Broadened their ecosystems of technology partners.**
  Services providers continue to engage in partnerships with software and hardware vendors to meet new customer demands and objectives. From 2021 to 2023, JLL formed strategic alliances with Infogrid and Nuvolo. Since Verdantix undertook the 2021 Green Quadrant analysis, AMS Workplace Technology (AMS) formed partnerships with Nuvolo and ServiceNow, and Horizant started working with Autodesk. These service providers are engaging in new partnerships to provide customers with a broader set of solutions to select from, thus growing their market share.

- **Launched new proprietary products that complement commercially available solutions.**
  Certain service providers have opted to develop proprietary software and hardware solutions for the workplace. For example, JLL offers both its own corporate real estate data and insights platform, JLL Azara, and products that it has acquired, such as Corrigo and Hank. The technology tools are used in various ways. Some providers introduce them to enhance existing software solutions from their partners, such as eCIFM's On The Go! mobile application for IBM TRIRIGA, and other services firms use them to help enable service delivery. Take Vanti leveraging its building operating system offering, Smart Core, to connect and orchestrate multiple building systems and devices. Several service providers offer their proprietary solutions alongside their suite of workplace services. Witness Ricoh launching Ricoh Spaces, a workplace management software solution with space reservation capability, and Vanti launching Kahu, a smart workplace solution suite including software and hardware.

- **Expanded the scope and breadth of services offered.**
  Workplace systems integrators have continued to extend the scope of services they provide to meet new customer demands, such as services for Internet of Things (IoT) sensors and data analytics. For example, since Verdantix ran the 2021 Green Quadrant research, AMS has established partnerships with HELLA Aglaia, OccupEye, VergeSense, Xovis and XY Sense to address customer demand for IoT devices. These providers are helping customers to transform historical IWMS platforms into connected portfolio intelligence platforms (CPIPs) (see Verdantix Market Insight: The Transformation Of IWMS To Connected Portfolio Intelligence Platforms (CPIP)). On the consulting side, eCIFM invested in further building out its organizational change management (OCM) practice after seeing an increasing number of clients specifically requesting OCM.

- **Started to leverage innovative technologies to boost their services.**
  Service providers have started using emerging technologies, such as AI, to enrich their own service offerings. For example, AMS's team of technicians uses AI to carry out core coding and development for configurations and customizations, allowing firms to develop and implement client customizations quickly. In a similar vein, Ricoh is testing the use of conversational AI to facilitate self-help, self-healing and zero-touch services. Service providers are also working with low-code software providers that simplify customizations, with Accenture, AMS and EY partnering with Modo Labs.

Integrators are investing in energy and data management capabilities to address customer pain points and future real estate portfolio needs

The workplace systems integration market is being shaped by providers launching new partnerships, developing propriety software solutions and enriching their services offerings with new capabilities or innovative technology. The services on offer continue to evolve, driven by market trends, such as employee experience, decarbonization programmes and a growing volume of data. The next three years will be shaped by:

- **Decarbonization programmes accelerating demand for sustainability management software.**
  A shifting regulatory landscape, growing stakeholder and employee interest, and new net zero goals are driving demand for ESG and sustainability management software solutions. Service providers, such as Accenture, Cognizant and eCIFM, report that clients are increasingly bringing up the topic of sustainability. However, real estate managers find sustainability and decarbonization programmes to be a daunting and expensive task. Many firms are, therefore, in a wait-and-see period – and are focusing on the low-hanging fruit in the meantime. Service providers are investing, and will continue to invest, in their sustainability consulting capabilities and engage in new partnerships to address customer demands (see Verdantix Green Quadrant: Climate Change Consulting 2023). Witness eCIFM establishing a separate practice for the deployment of ESG and a partnership with Envizi (now part of IBM).

- **Hybrid and remote working driving interest in digital office and collaboration solutions.**
  Most firms today have established hybrid working programmes and are now shifting their focus to employees' experience. In a hybrid office, most meetings will have some remote users calling in; organizations are therefore investing in audio-visual systems to ensure on-site and remote employees can collaborate efficiently. Firms are turning to service providers to help with a range of processes, from how to successfully communicate and implement hybrid working practices to redesigning workplaces for improved employee experiences and collaboration. Workplace systems integrators continue to invest in expanding workplace consulting offerings, launching new services for employees and establishing new partnerships.

- **Convergence of workplace IT and building OT systems.**
  Combining data and processes across both IT and operational technology (OT) domains unlocks new efficiencies (see Verdantix Market Overview: The Future Of Facilities And Real Estate Software - Unleashing The Power Of Data). For example, real-time occupancy data can inform building systems about conditions to help optimize settings such as airflow. As firms seek to leverage existing data sets and reduce real estate costs, they will increasingly turn to systems integrators to help them combine data from various systems and build data management platforms. Service providers interviewed, such as Accenture and EY, said they see the convergence of building systems, IoT networks, digital workplace solutions and IT systems as an opportunity over the next three years.

- **Further consolidation in the service provider and software vendor landscapes.**
  Over the past 15 years, there has been a high volume of mergers and acquisitions (M&A) across both the software vendor market and the systems integrators market. Consolidation in the software vendor landscape means workplace systems integrators have a smaller pool of suppliers within which to find partnership opportunities. However, when an existing partner acquires another vendor, it offers systems integrators an opportunity to learn and support new solutions. For example, long-time Archibus partner AREMIS is currently being onboarded to new Eptura software solutions, such as Proxyclick for visitor management and Condeco for space booking. Service providers have also been enhancing their workplace systems integration capabilities and increasing their market share through strategic acquisitions.

Customers must be aware of variations in service provider strategies

The workplace systems integration landscape is comprised of five segments, reflecting the backgrounds of providers (see **Figure 2**). Considering the different backgrounds and strategies of these firms, customers need to be aware that providers have:

- **Different depths of IT and business consulting services for workplace systems.**
While all workplace systems integrators will offer some level of consulting capability to help firms design technology architecture, Verdantix found that only a subset of the vendor landscape offers comprehensive IT and business consulting services for workplace systems. For example, Accenture, Deloitte, EY and JLL offer strong workplace technology consulting services for requirements-gathering and vendor selection, technology business case development, business process design and improvement, and organizational change management and governance. Customers should determine early on whether they require a single vendor to deliver end-to-end workplace services, or whether they are happy to engage multiple expert providers.

- **Various models for engaging with subcontractors.**
Customers should expect some level of subcontracting to occur when selecting a workplace systems integrator, particularly on multi-site and multi-solution deployments. In order to support a wider set of customers and cover more services for clients, some systems integrators, such as Cushman & Wakefield, employ a partnership strategy and may opt to outsource as much as 70% of deployment activity. Meanwhile, other service providers, such as AMS, eCIFM and ROI Consulting, outsource as little as 3% of their activity. Customers should ask potential vendors direct questions on how they intend to outsource activity by technology and region.

- **Divergent levels of real estate, facilities management and industry-specific expertise.**
Although all workplace systems integrators have the technical expertise needed to customize software solutions, their understanding of FM, real estate and industry-specific processes will vary. This variation usually results from an integrator's background, customer base and investments. For example, real estate services firms, such as JLL, tend to have a better understanding of real estate processes and overall market trends. Meanwhile, Horizant has expertise in government processes due to its work with many public-sector firms. Other service providers specifically invest in their knowledge base for relevant processes. Take AMS, which ensures that its staff continue to be educated and trained in FM through the International Facility Management Association (IFMA).

- **Different geographic footprints and international delivery capabilities.**
Customers should be aware of a systems integrator's ability to provide services in various regions. Large systems integrators with offices around the globe, such as Cognizant, Deloitte, EY and JLL, are more likely to be able to provide international implementation services than specialists. However, smaller specialist systems integrators may have a deeper understanding of country- or region-specific regulations and processes, such as AREMIS, which directly services firms across Belgium, France, Germany, Luxembourg and Switzerland. Customers should determine the geographic scale of the project and future projects they are considering before selecting a systems integrator.

- **Various levels of comfort integrating with OT systems and BMSs.**
Due to their heritage and expertise, systems integrators have divergent levels of comfort integrating with OT systems and building management/automation systems (BMSs/BASs). Master systems integrators (MSIs), such as Vanti, can usually provide end-to-end services for building systems, from technical design and physical systems integration to software customizations and ongoing support (see Verdantix Market Overview: Systems Integrators For Smart Buildings). Meanwhile, global consulting, real estate services and IT services firms – such as Accenture, EY and JLL – typically only provide services for defining the technology integration requirements and design, before passing the project along to – or partnering with – MSIs for the physical integration work. Customers interested in designing smart workplaces with OT systems integration should question service providers on their expertise with OT systems and approach for integrating such systems.

- **Distinct approaches to building out expertise and new services.**
Service providers are pursuing diverse approaches to extending their knowledge bases and suites of workplace services. Some – such as AREMIS, eCIFM and ROI Consulting Group – take an internal approach, investing in new teams or staff training, while others , like Ricoh, adopt a more acquisitive approach. From 2022 to 2023, Ricoh expanded its digital capabilities by acquiring firms that provide cloud and cybersecurity services (Pamafe IT), audio-visual, unified communication and workplace services (AVC, Cenero and Pure AV), IT and communication services (PFH Technology Group), and IT infrastructure and data management services (Corelia). In 2023, AREMIS created a dedicated practice, Insights, staffed with data analysts and data scientists to help customers make data-driven decisions. Buyers should take the time to consider which approach fits their specific needs best before selecting a provider.

- **Various types of partnerships with workplace management software vendors.**
Apart from MSIs, most workplace systems integrators do not offer truly independent services; instead, they often partner with a select number of workplace software vendors. Some systems integrators select partners based on in-house expertise or personal preferences, such as AMS partnering with FM:Systems for the solution's low-code capabilities. Other partnerships were formed over a decade ago due to the historical pain points of certain solutions, such as IWMS platforms. Legacy Archibus (now part of Eptura) and TRIRIGA (now part of IBM) deployments needed extensive customizations that required engaging a service provider with the necessary technical expertise (see Verdantix Green Quadrant: Integrated Workplace Management Systems 2022). These historical necessities have resulted in a range of long-term partnerships, such as the 20-years+ engagements between eCIFM and TRIRIGA and Horizant and Archibus. This approach means that service providers can become experts in specific solutions, helping them to apply a standard methodology for deployment, improving time and cost efficiencies. Customers looking for truly independent advice to start their search for a new technology solution could consider engaging a MSI, such as Vanti, or an independent consultant, such as The Clarient Group.

Figure 2

Workplace systems integrators landscape and provider backgrounds

Background	Strategy	Example firms
Real estate services firms	Building out technology capabilities to enhance internal operations and offer new client services	CBRE, Cushman & Wakefield, JLL
Global consulting firms	Extending consulting services to cover workplace technology projects, while offering comprehensive advisory services	Deloitte, EY, KPMG, PwC
Specialist systems integrators	Focusing services on specific countries, regions or industries, with expertise in business processes	AMS Workplace Technology, AREMIS, eCIFM Solutions, Horizant, ROI Consulting Group
IT services firms	Enhancing domain knowledge and deployment expertise in real estate software solutions	Accenture, Atos, Cognizant, IBM, Ricoh
Master systems integrators (MSIs)	Providing technical design of IT and operational technology (OT) systems, with a focus on the workplace	CBRE|ESI, Impec Group, Vanti

Note: Example firms list is not exhaustive.
Source: Verdantix analysis

Firms are engaging workplace systems integrators to help improve hybrid experiences and optimize real estate portfolios

To better understand customers' perspectives on workplace systems integrators and their service provisions, Verdantix interviewed customers provided by the participating firms. We asked these individuals to explain the attributes they evaluate when selecting a workplace systems integrator and their overall experience in engaging with providers. Alongside this, we leveraged data from our 2022 global corporate survey of facilities and real estate executives, and preliminary information from our 2023 survey, to gain insights into real estate priorities and technology investment plans.

Real estate strategies focus on optimizing costs, employee experiences and hybrid working programmes

To gain greater insight into real estate and facilities executives' strategic priorities and requirements for workplace systems integration projects, Verdantix analysed survey data sets regarding real estate objectives, portfolio priorities and technology investment plans. Facility executives are:

- **Optimizing real estate portfolios and workplaces.**
  In the 2022 Verdantix survey, 23% of respondents rate reducing real estate costs as their top objective and 21% rate it as their second priority over the next three years (see **Figure 3**). Executives are looking to identify optimization opportunities across their existing real estate portfolios, energy expenditures and overall building operations to help reduce costs (see Verdantix Global Corporate Survey 2022: Smart Building Technology Budgets, Priorities & Preferences).

- **Enhancing talent attraction and occupant wellbeing.**
  Talent attraction and occupant health were tied as the second most important objectives, with 22% of respondents rating each as their top objective. Firms are planning to further invest in software solutions that support employee experiences and wellbeing in the workplace, such as mobile applications with collaboration tools (see **Figure 4**).

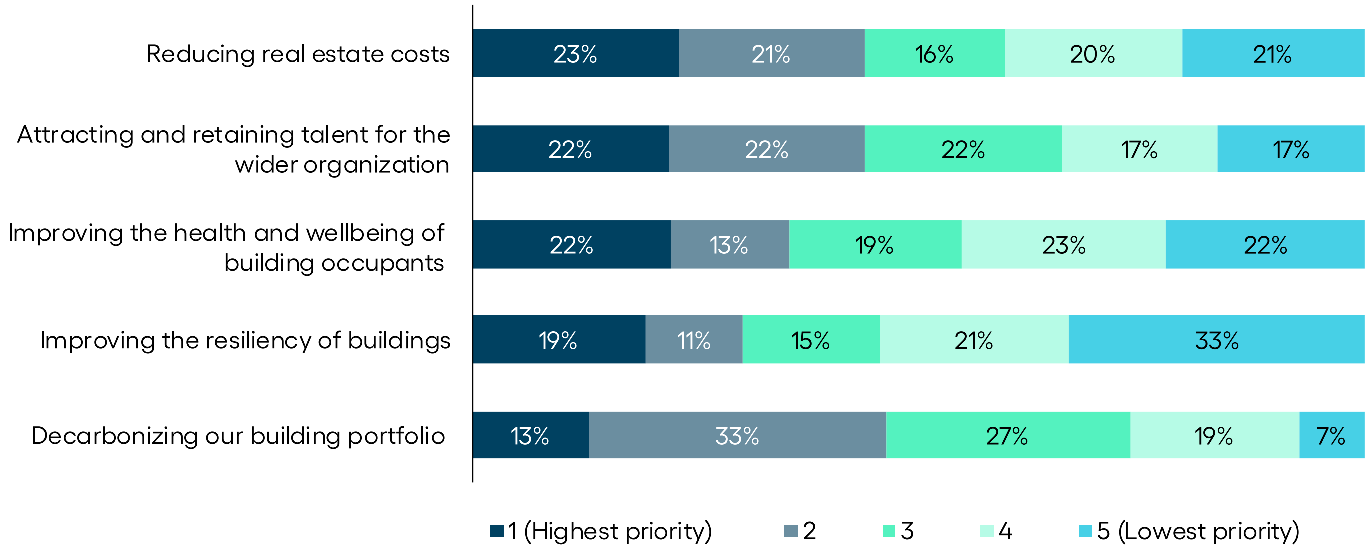
- **Collecting energy and sustainability data.**
  Although only 13% of firms ranked portfolio decarbonization as their top objective in 2022, it was the most popular second and third choice. Ongoing interviews with real estate executives are showing that decarbonization objectives have become more important in 2023. Organizations are prioritizing initiatives around meeting internal sustainability targets and reporting ESG data to stakeholders. Real estate managers are planning to increase investment in software solutions that support energy management and ESG and sustainability data management processes.

- **Analysing and refining hybrid working programmes.**
  After spending the last two years implementing hybrid working programmes, firms are now looking to analyse space data to help refine their strategies. Executives are planning to invest in space utilization monitoring solutions to understand how employees work under new agile programmes. Organizations are leveraging this data alongside space planning software solutions to help design new floorplans that better meet employees' needs.

Figure 3

Ranking of real estate objectives over the next three years

Rank the following real estate management objectives by importance for your organization over the next three years

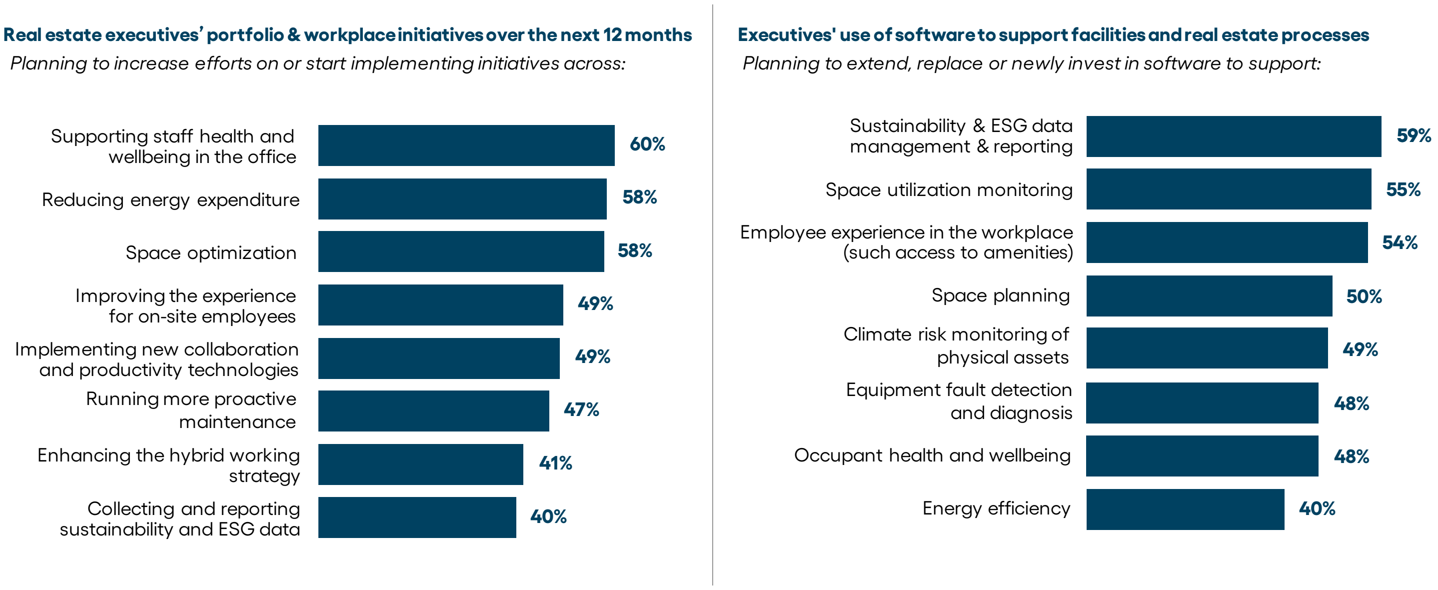


Note: Data labels are rounded to zero decimal places.

Source: Verdantix Global Corporate Survey 2022: Smart Building Technology Budgets, Priorities & Preferences N=350

Figure 4

Corporate real estate executive initiatives and investment trends



41% Expect to increase spending on workplace management software solutions

37% Expect to increase spending on IWMS/CPIP offerings

31% Expect to increase spending on real estate sustainability & ESG performance management platforms

Note: Data labels are rounded to zero decimal places.

Source: Verdantix Global Smart Building Corporate Survey 2022 N=350

Customers emphasize systems integrators' support services and understanding of their business when evaluating providers

The major priorities for real estate executives over the next three years include reducing costs, decarbonizing real estate portfolios, enhancing hybrid working programmes and creating attractive workplaces for employees. When reviewing potential providers to engage with, what factors impact the selection process? Interviews reveal that customers look for systems integrators that:

- **Combine technical expertise and understanding of business processes.**
  A systems integrator's experience in implementing specific solutions and technical expertise is always important as clients seek to customize software solutions and integrate with third-party offerings. However, technical expertise on its own is not enough for customers; they also prioritize a provider's ability to understand their specific processes. Decision-makers emphasize the importance of a systems integrator's ability to combine these two attributes to advise on the best way to integrate business workflows in software solutions. They find value in systems integrators that will go through the pros and cons of doing things a certain way.

  "A big positive is our service provider's business process knowledge and understanding of how the business would use the solution, and their ability to bring it all together with the technical aspects of the software." (Customer reference)

- **Fit culturally within the team and can communicate to the C-Suite.**
  Another attribute customers prioritize when selecting service providers is the cultural fit of the team. Clients want to make sure that the personality of a provider's staff meshes well with their own culture and in-house staff. Decision-makers will also evaluate a service provider's ability to present to higher-level executives and communicate the complex technical aspects of a project in an intuitive way. Customers see value in service providers that take the time to understand the firm's culture and embed that culture into their service delivery, communication and custom reports.

  "We understand the technical aspects of software because we're on the technology side, but communicating it to upper management is hard and the service provider had the expertise needed to do that." (Customer reference)

- **Provide high-value ongoing support services.**
  Ongoing support services and engagement were consistently mentioned by customers as key evaluation factors. Clients want to establish long-term partnerships with their service providers, rather than treating them as one-time engagements. Some of the firms Verdantix spoke to had been working with the same service providers for over 20 years. Beyond classic ongoing technical support, clients gain value from being able to call their service providers to get advice on the next steps, insights into new technologies in the market, or just general real estate and business strategy support. This desire to form partnerships with service providers further emphasizes the importance of a vendor's ability to understand their client's business and culture.

  "Support services are hugely important. Once a software solution is plugged in, that's the beginning of the journey and the need to maintain an active relationship with a service provider is huge." Customer reference)

- **Have industry-specific customer references.**
  Systems integrators should be able to provide potential clients with industry-specific customer references. This is an especially important attribute for healthcare and public sector firms, as they face more regulations and complex procurement processes (see Verdantix Market Overview: Building Technology For Life Sciences Facilities). Clients looking for industry-specific customization, such as space reporting for healthcare, want service providers that take the time to understand how they plan to use the solution.

  "A big piece of the work was an industry-specific tool, and the tool that our service provider built on top of the platform was robust and closely aligned with the way we think about the process."
  (Customer reference)

Green Quadrant for workplace systems integrators

Clients using workplace systems integration services across multiple industries and geographies seek solution providers who leverage deep real estate and IT domain expertise, as well as proven implementation experience. Customers engage these service providers to enhance the workplace experience for employees, supporting strategies to improve occupant wellbeing, talent retention, hybrid working and space rationalization. For the purpose of this report, Verdantix defines workplace systems integration services as:

> *"IT and business consulting, in conjunction with software implementation, integrations and post-deployment support services, to digitize and enhance real estate and workplace management processes, including but not limited to, collaboration enablement, office resource usage, portfolio optimization and building operations management."*

This definition includes the five capability criteria featured in this report: 1) access control, 2) workplace hardware and connectivity, 3) real estate and workplace platforms, 4) real estate and workplace point solutions, and 5) workplace IT.

Green Quadrant methodology

The Verdantix Green Quadrant methodology provides buyers of specific products or services with a structured assessment of comparable offerings across vendors at a specific point in time. The methodology supports purchase decisions by identifying potential suppliers, structuring relevant purchase criteria through discussions with customers and providing an evidence-based assessment of the products or services in the market. To ensure the objectivity of the study results, the research process is defined by:

- **Transparent inclusion criteria.**
  We endeavoured to analyse all providers that would qualify for inclusion in this research. For those providers that declined our invitation or failed to respond, we worked to include them based on publicly available information that would offer an impression of those firms' market positioning, if it were deemed possible and accurate.

- **Analysis from a customer's perspective.**
  We spoke with a panel of customers of workplace systems integration services to understand the relevant buying criteria. These discussions informed how we weighted the evaluation criteria in the model that drove the Green Quadrant analysis graphic. Additionally, we utilized data from Verdantix corporate surveys of real estate and facilities management decision-makers.

- **Reliance on professional integrity.**
  Since it would not be feasible to check all data and claims that the providers make, we emphasized the need for professional integrity. Competitors and existing customers can check each participant's assertions as they have been placed in the public domain through this report.

- **Scores based on available evidence.**
  To assess the expertise, resources, business results and strategies of individual providers, we collected evidence from public sources and conducted interviews with multiple representatives of each systems integration consultant, as well as industry experts. When providers claimed to be 'best in class', we challenged them to present supporting evidence.

- **Comparison based on relative capabilities.**
  We constructed measurement scales ranging from 'worst in class' to 'best in class' performance at a certain point in time for each assessment criterion. A provider's position in the market can change over time depending on how its offering and success evolves compared to its competitors. This means that, even if a provider adds new capabilities, makes a strategic acquisition or receives new investment, its quadrant positioning may not improve relative to other service providers if their competitors also enhance their offerings. Verdantix repeats a Green Quadrant analysis for a product or service market annually or every two years to capture these transitions over time.

Evaluated firms and selection criteria

Verdantix defined vendor inclusion criteria to ensure that the Green Quadrant analysis only compared firms providing similar services. The 12 providers of workplace systems integration services included in this study were selected because they:

- **Offer IT and business consulting capabilities for workplace systems.**
  To qualify for this benchmark study, participants must have an established consulting offering for workplace systems integration, such as requirements-gathering and vendor selection; technology business case development; business process design and improvement; and organizational change management and governance. These service lines help customers identify the problems that a software deployment would solve, express their requirements in a bid document, assess the return on investment and understand the impact a technology implementation would have on broader organizational processes.

- **Engage in at least three of the five implementation areas.**
  To qualify for this benchmark study, participants must offer implementation services across at least three of the following service sub-segments: 1) access control, 2) workplace hardware and connectivity, 3) real estate and workplace platforms, 4) real estate and workplace point solutions, and 5) workplace IT, regarding the use of collaboration and productivity tools.

- **Generate an annual revenue from workplace systems integration projects of at least $3 million.**
  Verdantix established this hurdle in order to screen out small workplace systems integrators. Although smaller firms may offer capabilities similar to those of their larger counterparts, including this subset would have invalidated the direct peer-to-peer comparison. For this reason, the final inclusion criterion was an annual revenue generation of at least $3 million, which all participants easily passed.

Based on the inclusion criteria above, this report evaluated 12 workplace systems integration service providers: Accenture, AMS Workplace Technology, AREMIS, Cognizant, Deloitte, eCIFM Solutions, EY, Horizant, JLL, Ricoh, ROI Consulting Group and Vanti. Ten service providers in this study actively participated through responses to an 82-point questionnaire and detailed briefings about their offerings. Cognizant declined to participate actively but provided a two-hour briefing on significant updates to its services since participating in the 2021 Green Quadrant on workplace systems integrators. Deloitte declined to participate actively and was scored based on publicly available information. Verdantix also invited CBRE, Cushman & Wakefield, IBM, KPMG, NTT DATA, TATA Consultancy Services and Wipro, all of whom declined to participate in this year's report.

Evaluation criteria for workplace systems integrators

Verdantix developed the evaluation criteria within the Green Quadrant through a combination of general industry knowledge, desk research, and interviews with real estate managers and systems integration consultants. In full, this Green Quadrant analysis compared offerings from 12 workplace systems integration providers using an 82-point questionnaire, covering 18 categories of capabilities and six categories of market momentum. These categories are weighted by significance to customers and complexity of implementation services. Individual metrics were classified as:

- **Capabilities metrics.**
  The capabilities dimension of the analysis, as captured on the vertical axis of the Green Quadrant graphic, is used to measure each workplace systems integrator based on the typical scope of services provided, differentiators against other providers, partnerships in place and proven experience in each area. Verdantix assessed capabilities across two categories. In the first category – IT and business consulting services for workplace systems – Verdantix assessed providers across four capabilities. In the second category, concerning implementation services, Verdantix assessed providers across five capabilities. Verdantix also assessed evidence of support services in each of these five capabilities. In total, Verdantix assessed the providers across 64 capability metrics, representing 18 distinct categories.

- **Momentum metrics.**
  The momentum dimension of the analysis, as captured on the horizontal axis of the Green Quadrant graphic, was used to measure each systems integrator based on the strength of its market vision, its ability to support customer needs and its track record in customer wins. To assess performance along this dimension, Verdantix collected data on 18 criteria across six areas: 1) vision and strategy, 2) organizational resources, 3) customer base, 4) deal dimensions, 5) commercial partnerships and 6) financial resources.

Verdantix weighted each primary criterion and sub-criterion based on its importance within the capabilities and momentum dimensions. We developed the weightings based on the complexity of services required for each area and Verdantix analyst perspectives on the broader workplace digital services landscape. Verdantix defined success measures for each sub-criterion and then scored each participant's performance on the sub-criterion from zero to three. For example, IWMS systems integration is a criterion addressed in the capabilities section and is composed of three sub-criteria that determined the overall IWMS score. The combination of the providers' scores across the capabilities and momentum dimensions generated the Green Quadrant graphic. **Figure 5** and **Figure 6** provide details on the study criteria; **Figure 7** and **Figure 8** provide the scoring for all participants against the criteria. The Figures also present the weighting of each primary criterion, shown inside the parentheses. **Figure 9** shows the Green Quadrant graphic, summarizing the positioning of all service providers in this benchmark study.

Figure 5

Capabilities criteria for workplace systems integrators

Service line	Capabilities	Questions
IT & business consulting services for workplace systems	Requirements-gathering and vendor selection (5.5%)	Please list typical scopes you undertake in projects for requirements-gathering and vendor selection for workplace systems and any ways you differentiate your approach from others in the market. How many projects in this area has your firm worked on in the last two years? Please also summarize your role in a project to highlight the depth of your capabilities.
	Technology business case development (5.5%)	Please list typical scopes you undertake in business case development projects and any ways you differentiate your approach from others in the market. How many projects in this area has your firm worked on in the last two years? Please also summarize your role in a project to highlight the depth of your capabilities.
	Business process design and improvement (5.5%)	Please list typical scopes you undertake in business process optimization projects and any ways you differentiate your approach from others in the market. How many projects in this area has your firm worked on in the last two years? Please also summarize your role in a project to highlight the depth of your capabilities.
	Organizational change management and governance (5.5%)	Please list typical scopes you undertake in organizational change management projects and any ways you differentiate your approach from others in the market. How many projects in this area has your firm worked on in the last two years? Please also summarize your role in a project to highlight the depth of your capabilities.
Access control	Access control systems implementation (5.5%)	What is the typical scope of systems integration services you deliver for access control systems? What are the biggest projects you've implemented in the last two years? How many projects in this area has your firm worked on in the last two years? Please also summarize your role in a project to highlight the depth of your capabilities.
	Access control systems support services (1.5%)	What are your capabilities and differentiators for providing support services for access control systems (including maintenance, support and helpdesk services)? How many support projects in this area has your firm worked on in the last two years? Please also summarize your role in a project to highlight the depth of your capabilities.
Workplace hardware & connectivity	IoT sensors & IoT connectivity (5.5%)	What is the typical scope of systems integration services you deliver for workplace IoT sensors and connectivity (such as occupancy, indoor air quality, temperature and asset tracking devices)? What are the biggest projects you've implemented in the last two years? How many projects in this area has your firm worked on in the last two years? Please also summarize your role in a project to highlight the depth of your capabilities.
	Digital signage (3%)	What is the typical scope of systems integration services you deliver for digital signage? What are the biggest projects you've implemented in the last two years? How many projects in this area has your firm worked on in the last two years? Please also summarize your role in a project to highlight the depth of your capabilities.
	Operational technology (OT) integrations (5.5%)	What is the typical scope of systems integration services you deliver for OT integrations (such as integrations with BMS/BAS, smart lighting and parking management)? What are the biggest projects you've implemented in the last two years? How many projects in this area has your firm worked on in the last two years? Please also summarize your role in a project to highlight the depth of your capabilities.
	Support services (all workplace hardware & connectivity) (5%)	What are your capabilities and differentiators for providing support services for real estate and workplace point solution offerings (including systems maintenance, support and helpdesk services)? How many support projects in this area has your firm worked on in the last two years? Please also summarize your role in a project to highlight the depth of your capabilities.

Figure 5 (continued) ↓

Figure 5 (continued)

Real estate & workplace platforms	IoT platforms (5.5%)	What is the typical scope of systems integration services you deliver for IoT platforms? What are the biggest projects you've implemented in the last two years? How many projects in this area has your firm worked on in the last two years? Please also summarize your role in a project to highlight the depth of your capabilities.
	Building digital twins software (3%)	What is the typical scope of systems integration services you deliver for digital twins? What are the biggest projects you've implemented in the last two years? How many projects in this area has your firm worked on in the last two years? Please also summarize your role in a project to highlight the depth of your capabilities.
	CAFM/IWMS/CPIP (5.5%)	What is the typical scope of systems integration services you deliver for CAFM/IWMS/CPIP? What are the biggest projects you've implemented in the last two years? How many projects in this area has your firm worked on in the last two years? Please also summarize your role in a project to highlight the depth of your capabilities.
	Energy & sustainability management software (5.5%)	What is the typical scope of systems integrations services you deliver for energy and sustainability management software? What are the biggest projects you've implemented in the last two years? How many projects in this area has your firm worked on in the last two years? Please also summarize your role in a project to highlight the depth of your capabilities.
	Support services (all real estate & workplace platforms) (5%)	What are your capabilities and differentiators for providing support services for real estate and workplace platforms (including systems maintenance, support and helpdesk services)? How many support projects in this area has your firm worked on in the last two years? Please also summarize your role in a project to highlight the depth of your capabilities.
Real estate & workplace point solutions	Lease management software (3%)	What is the typical scope of systems integration services you deliver for lease management software? What are the biggest projects you've implemented in the last two years? How many projects in this area has your firm worked on in the last two years? Please also summarize your role in a project to highlight the depth of your capabilities.
	Capital project management software (3%)	What is the typical scope of systems integration services you deliver for capital project management software? What are the biggest projects you've implemented in the last two years? How many projects in this area has your firm worked on in the last two years? Please also summarize your role in a project to highlight the depth of your capabilities.
	Workplace management systems (5.5%)	What is the typical scope of systems integration services you deliver for workplace management systems? What are the biggest projects you've implemented in the last two years? How many projects in this area has your firm worked on in the last two years? Please also summarize your role in a project to highlight the depth of your capabilities.
	Workplace mobile apps (3%)	What is the typical scope of systems integration services you deliver for workplace mobile apps? What are the biggest projects you've implemented in the last two years? How many projects in this area has your firm worked on in the last two years? Please also summarize your role in a project to highlight the depth of your capabilities.
	Support services (all real estate & workplace point solutions) (5%)	What are your capabilities and differentiators for providing support services for real estate and workplace point solution offerings (including systems maintenance, support and helpdesk services)? How many support projects in this area has your firm worked on in the last two years? Please also summarize your role in a project to highlight the depth of your capabilities.
Workplace IT	Cloud collaboration tools (2%)	What is the typical scope of systems integration services you deliver for cloud collaboration tools? What are the biggest projects you've implemented in the last two years? How many projects in this area has your firm worked on in the last two years? Please also summarize your role in a project to highlight the depth of your capabilities.
	Unified device management (2%)	What is the typical scope of systems integration services you deliver for device management? What are the biggest projects you've implemented in the last two years? How many projects in this area has your firm worked on in the last two years? Please also summarize your role in a project to highlight the depth of your capabilities.
	Mobile device support and management (2%)	What is the typical scope of systems integration services you deliver for mobile device support? What are the biggest projects you've implemented in the last two years? How many projects in this area has your firm worked on in the last two years? Please also summarize your role in a project to highlight the depth of your capabilities.
	Remote intranet access management (2%)	What is the typical scope of systems integration services you deliver for intranet access management? What are the biggest projects you've implemented in the last two years? How many projects in this area has your firm worked on in the last two years? Please also summarize your role in a project to highlight the depth of your capabilities.

Percentages in brackets represent the weighting given to each criterion in the flexible multi-criteria model that generates the Green Quadrant graphical analysis.

Source: Verdantix analysis

Figure 6

Momentum criteria for workplace systems integrators

Momentum	Questions
Vision & strategy (25%)	What is your firm's vision for the evolution of customer requirements over the next two years? What is your firm's strategy to meet the needs of customers and develop your services over the next 2 years? Are there any significant product improvements or capabilities developments that you are investing in?
Organizational resources (10%)	How many in-house employees work on workplace technology projects? What is the average number of years of experience in the real estate and workplace sector across your in-house team? In how many locations does your firm have technical support resources? Please specify both the number and geographic coverage. What is your strategy for sub-contracting? What sub-contractors do you typically engage? What percentage of your overall workforce is comprised of external expertise?
Customer base (20%)	What is the size of your customer base for workplace systems integration services (as of 2022)?
Deal dimensions (15%)	In the last 2 years, how many projects have you won with a lifetime value greater than $1m? In the last 2 years, how many projects have you won with a lifetime value between $500k and $1m? In the last 2 years, how many projects have you won with a lifetime value between $100k and $500k? In the last 2 years, how many projects have you won with a lifetime value between $50k and $100k?
Commercial partnerships (15%)	With which vendors does your firm have a publicly announced strategic alliance to deliver workplace IT services? With which vendors does your firm have an informal partnership to deliver workplace IT services?
Financial resources (15%)	What were your firm's annual revenues in the last financial year? What were your firm's revenues from workplace services in the last financial year? How did revenues for workplace IT services change between 2021 and 2022?
Percentages in brackets represent the weighting given to each criterion in the flexible multi-criteria model that generates the Green Quadrant graphical analysis.	

Source: Verdantix analysis

Figure 7

Capability criteria scores for workplace systems integrators

		Accenture	AMS Workplace	AREMIS	Cognizant	Deloitte	eCIFM	EY	Horizant	JLL	Ricoh	ROI Consulting	Vanti
IT & business consulting services for workplace systems	Requirements-gathering and vendor selection	2.5	1.0	1.0	2.5	2.5	1.5	2.0	1.0	2.5	2.5	1.0	0.0
	Technology business case development	2.5	1.0	1.5	2.0	2.5	1.0	2.5	1.5	3.0	1.5	1.0	0.0
	Business process design and improvement	2.0	1.5	1.5	1.5	2.5	1.0	3.0	1.5	2.5	1.5	1.5	0.0
	Organizational change management and governance	2.0	1.0	1.5	1.5	3.0	1.5	3.0	1.0	3.0	1.0	1.5	0.0
Access control	Access control systems implementation	1.2	0.8	1.2	1.5	1.0	0.8	1.8	1.1	0.5	1.8	0.8	1.6
	Access control systems support services	0.5	1.0	0.0	1.0	1.0	1.0	1.0	1.0	0.0	1.0	1.0	0.5
Workplace hardware & connectivity	IoT sensors & IoT connectivity	2.2	1.2	1.5	2.5	2.8	1.0	2.6	1.0	2.3	1.0	1.7	1.3
	Digital signage	1.3	1.0	1.0	1.1	0.0	0.8	2.0	0.8	2.6	1.5	1.0	2.6
	Operational technology (OT) integrations	2.0	0.0	0.0	1.5	1.8	0.8	2.3	0.8	1.3	1.0	0.0	2.6
	Support services (all workplace hardware & connectivity)	2.0	1.0	0.0	2.0	2.5	1.0	1.0	1.0	2.5	1.5	1.0	1.5
Real estate & workplace platforms	IoT platforms	2.8	1.0	0.0	2.2	3.0	1.0	2.6	1.2	2.2	1.8	1.5	0.0
	Building digital twins software	2.2	1.0	1.0	1.8	2.0	1.0	2.3	1.0	1.5	0.3	1.0	1.0
	CAFM/IWMS/CPIP	1.7	1.8	2.3	1.3	2.1	2.5	1.8	1.8	2.8	0.0	2.0	0.0
	Energy & sustainability management software	2.7	0.5	0.0	2.0	1.3	1.2	2.6	1.0	2.8	0.0	0.4	2.1
	Support services (all real estate & workplace platforms)	2.0	1.5	2.0	2.0	2.0	2.0	1.5	2.0	3.0	2.5	2.0	1.5

Figure 7 (continued) ↓

Figure 7 (continued)

		Accenture	AMS Workplace	AREMIS	Cognizant	Deloitte	eCIFM	EY	Horizant	JLL	Ricoh	ROI Consulting	Vanti
Real estate & workplace point solutions	Lease management software	2.5	1.0	2.3	1.0	2.0	1.8	2.8	1.0	2.0	0.0	1.0	0.0
	Capital project management software	1.3	1.0	1.8	1.3	1.3	2.1	1.8	1.5	2.5	0.0	0.2	0.0
	Workplace management systems	1.2	1.0	1.8	1.2	1.2	1.3	1.3	1.8	2.8	2.3	2.0	1.8
	Workplace mobile apps	2.3	2.0	1.0	1.3	2.5	1.8	2.2	1.5	2.3	2.0	1.5	1.5
	Support services (all real estate & workplace point solutions)	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	3.0	2.0	1.5	0.0
Workplace IT	Cloud collaboration tools	2.8	0.0	0.0	2.5	1.0	1.0	1.3	1.2	0.0	2.5	1.5	0.0
	Unified device management	2.0	0.0	0.0	2.3	2.5	0.8	1.0	0.8	0.0	2.0	0.0	0.0
	Mobile device support and management	1.8	0.0	0.0	1.5	1.0	0.8	1.0	1.0	0.0	1.8	0.0	0.0
	Remote intranet access management	1.5	0.0	0.0	1.0	1.7	0.8	1.0	0.5	0.0	0.8	0.0	0.0

Vendor provides evidence of market-leading capability, supported by a broad set of references to customer examples	3
Vendor provides evidence of strong capability, supported by a broad set of references to customer examples	2
Vendor provides evidence of moderate capability, with limited references to customer examples	1
No response provided or available publicly, or supplier has a weak offering	0

Source: Verdantix analysis

Figure 8

Momentum criteria scores for workplace systems integrators

	Accenture	AMS Workplace	AREMIS	Cognizant	Deloitte	eCIFM	EY	Horizant	JLL	Ricoh	ROI Consulting	Vanti
Vision & strategy	2.0	1.5	1.5	2.5	2.5	1.5	1.5	2.0	2.5	2.5	2.0	2.0
Organizational resources	2.7	1.3	1.4	2.3	1.9	2.0	1.7	1.4	2.1	2.1	1.4	1.5
Customer base	3.0	1.0	2.0	2.0	2.0	2.0	2.0	1.0	3.0	3.0	2.0	2.0
Deal dimensions	2.3	1.8	2.0	1.8	1.3	1.3	2.0	1.5	2.5	1.5	1.0	1.0
Commercial partnerships	2.5	1.0	2.0	2.0	2.3	1.0	2.5	0.8	1.0	1.8	1.8	1.0
Financial resources	2.3	1.3	1.7	2.7	2.3	1.7	2.3	1.3	2.7	3.0	1.7	1.3

Vendor provides evidence of market-leading presence, supported by a broad set of references to customer examples	3
Vendor provides evidence of strong presence, supported by a broad set of references to customer examples	2
Vendor provides evidence of moderate presence, with limited references to customer examples	1
No response provided or available publicly, or supplier has a weak offering	0

Source: Verdantix analysis

Figure 9
Green Quadrant for workplace systems integrators 2023

Capabilities

This dimension measures each workplace systems integrator on the breadth and depth of its offerings across 24 capability areas, as outlined in **Figure 5**.

Momentum

This dimension measures each workplace systems integrator on six strategic success factors, as outlined in **Figure 6**.

Note: A white circle indicates a non-participating vendor.
Source: Verdantix analysis

Ricoh offers tailorable workplace services and solutions to drive workplace digitization projects

Founded in 1936, Ricoh is a multinational imaging and digital services firm with over 80,000 employees across the globe. It has sales, support, production and R&D operations in around 200 countries. Ricoh has more than 1,000 workers across several centres and disciplines, directly delivering workplace technology solutions and services. Its digital services cut across five key areas: digital workspace; business process management; digital experience; cyber security; and cloud and infrastructure services. Within its digital workspace services, it provides remote managed services, meeting room services, collaboration tools, smart lockers, digital mailrooms, and document management and print services, among other solutions. Ricoh also offers RICOH Spaces, a workplace management software solution launched in 2018, which over 150 firms now use to manage operations across more than 500 sites.

Strengths and differentiators

Based on the Green Quadrant analysis, Verdantix finds that Ricoh has strengths in its:

- **Comprehensive suite of software, hardware and service offerings for the workplace.**
  Ricoh achieved one of the leading scores, 2.3/3.0, for its workplace management systems capabilities. The firm offers workplace software (RICOH Spaces) and hardware solutions, as well as implementation and support services. Its Smart Collaboration Rooms offering provides presenting, video-conferencing and interactive collaboration solutions, such as interactive whiteboards and digital signage, to facilitate collaboration in hybrid working environments. The RICOH Spaces platform offers space reservation tools and can integrate with Internet of Things (IoT) sensors to deliver space utilization data. The platform can also manage car parking spaces, integrating with Toogethr, a parking management solution.

- **Tailorable ongoing support services for clients.**
  Ricoh achieved above-average scores for all support services areas, spanning its support services for workplace hardware and connectivity (1.5/3.0), real estate and workplace platforms (2.5/3.0) and point solutions (2.0/3.0). The firm's massive and distributed workforce allows it to provide 24/7 multi-channel, multilingual, on-demand support services. These can also be delivered in conjunction with other vendors; Ricoh can raise tickets on behalf of a customer, even if a solution is not Ricoh-specified, thereby offering customers a single point of contact for support. Furthermore, Ricoh offers packaged solutions, providing tailored support to customers that can be consumed as needed.

- **Technology roadmap for RICOH Spaces, covering integrations and new capabilities.**
  Ricoh continues to invest in RICOH Spaces, and has developed a technology roadmap for the offering that continuously evolves to meet customer demands. The firm's integration roadmap shows plans to integrate with Microsoft Teams, OpenAI, ScreenCloud and its own Ricoh Smart Lockers; it also aims to allow customers to use RICOH Spaces data in conjunction with broader performance reporting, via webhooks, and to add new functionality and tools to address customer challenges such as energy and sustainability in the workplace. Ricoh is currently investigating how to leverage generative AI to provide intelligent suggestions and chatbot functionality inside RICOH Spaces.

- **Business strategy emphasizing the use of innovative technologies.**
  Ricoh achieved a market-leading score of 2.5/3.0 for its market vision and business strategy in the Momentum sector of this benchmark. The firm is investing in new ways to leverage advanced technology such as AI, to drive automation and deliver new services. For example, it is testing the use of conversational AI to facilitate self-help, self-healing and zero-touch services.

Improvement opportunities

Based on the Green Quadrant analysis, Verdantix finds that Ricoh could improve by:

- **Making customers more aware of its plans for acquired businesses.**
  Beyond internal staff upskilling and continued investment in RICOH Spaces, Ricoh has built out its digital capabilities and portfolio of services via a series of acquisitions. From 2020 to 2022, the firm acquired a dozen firms offering workplace services and solutions, such as audio-visual (AV), unified communication, infrastructure and cloud, and data management services. Given Ricoh's highly acquisitive approach to workplace services, it could benefit from clearly defining its plans for its recent acquisitions and providing customers with more details on the new services or additional value offered.

- **Re-engaging with software and hardware partners.**
  In the 2021 Green Quadrant for workplace systems integrators, Ricoh noted partnerships with dedicated workplace solutions firms such as Condeco, iOFFICE (now Eptura), PointGrab, Relogix and VergeSense. In 2023, most of these partnerships have disappeared, except for those with PointGrab and VergeSense, due to Ricoh's strategy of focusing on its proprietary RICOH Spaces software platform. Ricoh notes that it will integrate with existing vendors as required – and has previously done so with Condeco. However, the firm could consider engaging with more workplace solution specialists, to support a broader customer base.

Selection advice for buyers

Considering all workplace systems implementor offerings assessed through the Green Quadrant, we believe that Ricoh should be shortlisted by:

- **Enterprises looking for a partner to support complete workplace transformation projects.**
  Ricoh's suite of workplace offerings and adjacent services makes it well-positioned to provide solutions and end-to-end services to clients undergoing workplace transformation projects. A global pharmaceuticals firm selected RICOH Spaces to enable its hybrid working programme; it is rolling this out in a phased approach across global locations, with Ricoh Supply Chain Management providing additional commercial, legal and administrative support.

- **Firms with hybrid working programmes seeking to boost employee productivity.**
  Various firms already use the RICOH Spaces solution to enable hybrid working programmes and gain insights into space utilization. For example, RICOH Spaces helped the airline group easyJet streamline its return to work and identify unused space, leading to a much more cost-effective use of office space. RICOH Spaces can also integrate with existing business tools such as Google and Microsoft calendars; witness HR and payroll software firm Visma | Raet deploying RICOH Spaces with a Google Workspace integration, allowing users to access the Ricoh solution from their existing Google tools and see reservations made via Ricoh in employees' calendars.

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