Analysing 52 digital solutions for real estate management

Luc Monteil - EXIMIUS Real Estate Advisory (real estate strategy consulting, owner's representation, asset enhancement)

English translation of the French article (September 2026). The figures are reproduced from the French original.

The market for digital solutions that contribute to the technical and asset management of buildings has become hard to read. EXIMIUS REA, an engineering and consulting firm in real estate management, analysed 52 solutions along six functional axes, from the PPA/PPAT (multi-year investment and works plan) to energy management, and along a cross-cutting component, the maturity of artificial intelligence.

Each solution is also positioned on a management chain described in four layers, from the instrumented building to financial risks and arbitration.

This comparison does not seek to name the "best tool". It characterises what the solutions offer to handle and the conditions under which data can lead to decisions, then to effective actions.

Summary for decision-makers

Fifty-two vendors now promise to manage a portfolio "from end to end". Twenty of them do not natively and fully cover any of the six functional axes that this market claims to address. This finding is not an indictment: it reflects a market whose sales pitches have converged faster than the capabilities of the solutions. For anyone who has to commit a digital budget, arbitrate a CAPEX or write a specification, the gap between claimed coverage and real coverage has become the first investment risk.

This article does not draw up a ranking and does not name a winner. It provides the reading grid that was missing: six functional axes, four levels of coverage (native, partial, integration, absent), an AI maturity scale in four levels (IA0 to IA3) and a management chain in four layers, from the instrumented building to financial arbitration. Applied to 52 solutions as at 30 June 2026, it converts a sales pitch into verifiable criteria.

Four findings that the pitches do not put forward:

• **Displayed breadth masks depth.** 38% of the solutions have no axis covered natively and fully; only seven are native on three axes or more.

• **Acting on energy remains a niche.** EMS is the least covered axis of the panel (12 native solutions, 17 with no identified coverage): most tools display consumption, few reduce it.

• **AI remains, for the most part, a promise.** 60% of the solutions are at IA0 or IA1; five reach a prescriptive level (IA3).

• **Value comes from continuity, not from the tool.** Data that does not rise as far as arbitration remains a collection cost; a decision that does not come back down as an action, an owner and a measurement remains an intention.

The benefit for the reader is therefore methodological: placing an offer in a target architecture rather than in a catalogue, ruling out at pre-selection whatever does not stand up to proof, and writing into the specification the seven proofs to require as well as the three due diligence checks (cybersecurity, reversibility, long-term viability of the vendor) that sales pitches rarely raise by themselves.

The question is not "which of these 52 solutions should I adopt?", but "which two or three building blocks, tied to which architecture, make my asset decisions faster, more traceable and more defensible?". The following pages provide the means to answer it.

Key figures

- **A double reading grid:**
- six functional axes and an AI component (IA0 to IA3) to assess the functionalities;
- four layers of use (building and data, run management, knowledge and planning, arbitration and value) to place each solution in the decision chain (figures 1 and 5).
- **52 solutions analysed, grouped into six dominant families;**
- Assets and compliance: 43 solutions out of 52 native or partial; energy/EMS: 21 out of 52 native or partial.
- For twenty of the solutions analysed, none of the six functional axes studied corresponds to a core functionality offered natively and fully; their coverage rests mainly on partial functions or integrations with third-party tools; only seven are native on three axes or more.
- 31 solutions are at IA0 or IA1; five reach IA3 according to the public information analysed.
- **Value comes less from the functional breadth displayed than from the continuity between data, action, planning and arbitration.**

A crowded market, a promise still to be qualified

Built assets are now managed at the crossroads of use, engineering, energy, compliance and finance. In France, Éco Énergie Tertiaire sets progressive targets for reducing consumption, while the BACS scheme strengthens, according to the applicable thresholds and deadlines, the automation and control of commercial buildings. To these obligations are added, depending on the players and their scope, the requirements of sustainability reporting and taxonomy, market trajectories such as CRREM, energy volatility and investors' expectations. All converge on the same need: having reliable data, demonstrating results and arbitrating CAPEX/OPEX actions.

This abundance has a downside: the pitches have converged. Property companies, asset managers, operators and local authorities now receive almost identical promises, in which every vendor claims “end-to-end” coverage. Telling genuinely native functionality from marketing veneer has become an exercise in its own right, and a prerequisite for any digital investment decision.

This is the purpose of the documentary scan conducted by EXIMIUS REA as at 30 June 2026: 52 solutions contributing, directly or indirectly, to the technical and asset management of buildings, analysed in two successive rounds. The positions rest on the information supplied or published by the vendors, their websites, their public documentation and the communications available; they qualify the coverage claimed, not the performance observed in operation. The study provides pre-selection criteria for the offers of the market analysed: it is neither a product audit, nor an independent benchmark, nor a cybersecurity, financial or contractual due diligence.

A double reading grid: assessment axes and layers of use

To make comparisons objective, the study crosses two complementary reading grids. The first qualifies what each solution offers to handle, through six functional axes and an AI component assessed separately. The second places each solution in a management chain in four layers, which structures figures 1 and 5. Layer 1 instruments the building: BMS (GTB, GTC), IoT and source systems produce the data. Layer 2 manages the run through axes [2] operation and maintenance and [3] energy/EMS. Layer 3 makes knowledge reliable and then plans the transformation; it splits into layer 3.1 - equipment inventory and compliance, carried by axis [4] assets and compliance, and layer 3.2 - technical asset management and planning, which extends this axis towards axes [1] PPA/PPAT, [5] decarbonisation and trajectory and [6] ESG. Layer 4 is the purpose: arbitrating CAPEX/OPEX scenarios with regard to value, overall risks, liquidity, the balance sheet and cash. AI is here a cross-cutting component: depending on its maturity, it can enhance analysis, recommendation, prediction or automation at each of the layers.

The stance of the study is simple: value comes from circulation between the layers. Data must rise as far as arbitration; the decision must come back down to an action, an owner and a measurement of the result. Isolated data remains a collection cost; a dashboard without an action loop remains information; a trajectory without an investment plan remains an intention.

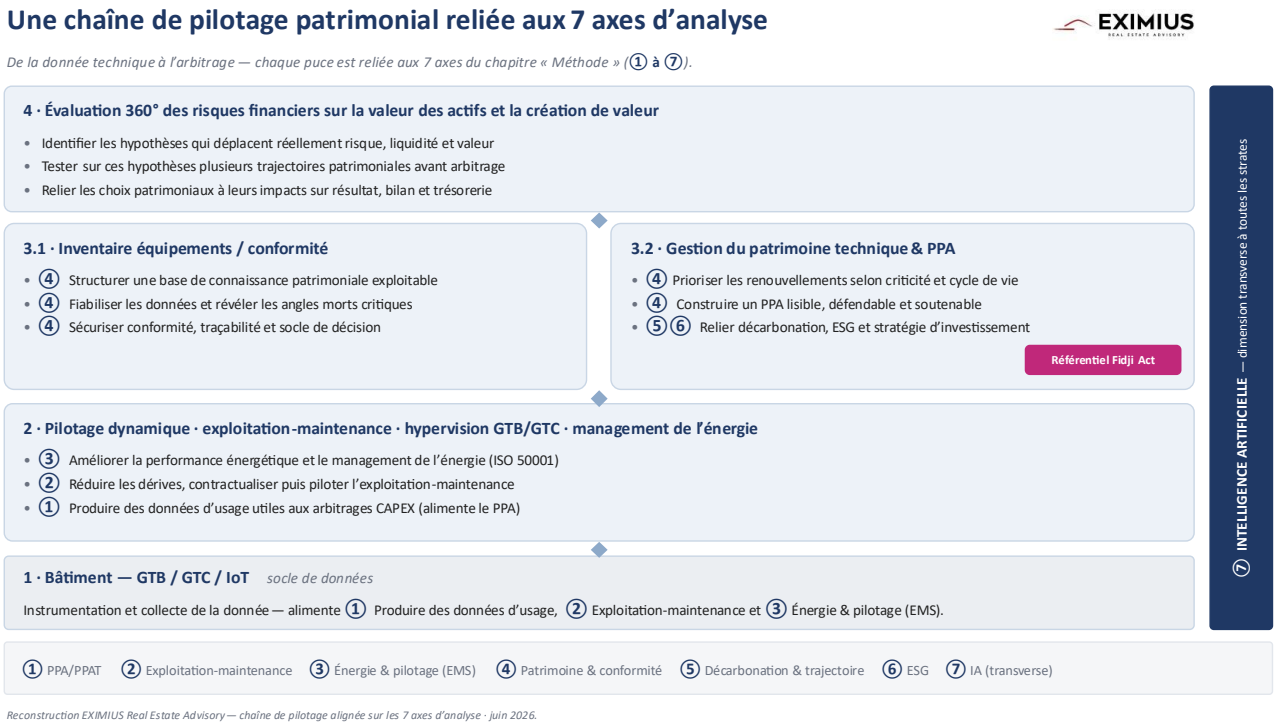


Figure 1 - From data to arbitration: four management layers, six functional axes and a cross-cutting AI component (source: EXIMIUS study, June 2026).

Method: six functional axes, an AI component and four levels of coverage

Each solution is assessed on six functional axes covering the plan, the run and governance; artificial intelligence has a separate maturity scale:

1. **Multi-year investment plan (PPA/PPAT)**: quantifying, prioritising, building scenarios and updating a traceable investment plan.
2. **Operation and maintenance**: contracting services, tracking commitments, detecting drifts and triggering actions.
3. **Energy and control (EMS)**: collecting and analysing energy data then, depending on the level of coverage, recommending or acting on setpoints.
4. **Assets and compliance**: structuring the inventory of assets and equipment, the evidence, the histories, criticality and obligations.
5. **Decarbonisation and trajectory**: linking carbon targets, actions per asset, portfolio trajectory and CAPEX needs.
6. **ESG**: calculating, documenting, consolidating and reporting indicators, reporting and non-financial evidence.
7. **Artificial intelligence**: qualifying a separate maturity, from IA0 (no AI claimed) to IA3 (predictive, prescriptive or dynamic/automatic control).

For the six functional axes, the coding distinguishes four levels: Native (N/3), own and strong coverage; Partial (P/2), coverage present but limited; Integration or indirect (I/1), coverage obtained through connection, import/export or peripheral processing; 0, coverage not identified.

AI follows its own scale: IA0, no AI claimed; IA1, automations, alerts or rules; IA2, analysis, extraction, recommendation or detection; IA3, predictive, prescriptive, dynamic or automatic control.

The method therefore produces three separate outputs: a footprint by axis, a main anchoring layer and a dominant family. Each solution is attached to the layer where it mainly creates its value, shown in figure 5. The 2D map summarises the plan and the run from explicit conventional weightings; it orders relative profiles, without constituting an absolute ranking.

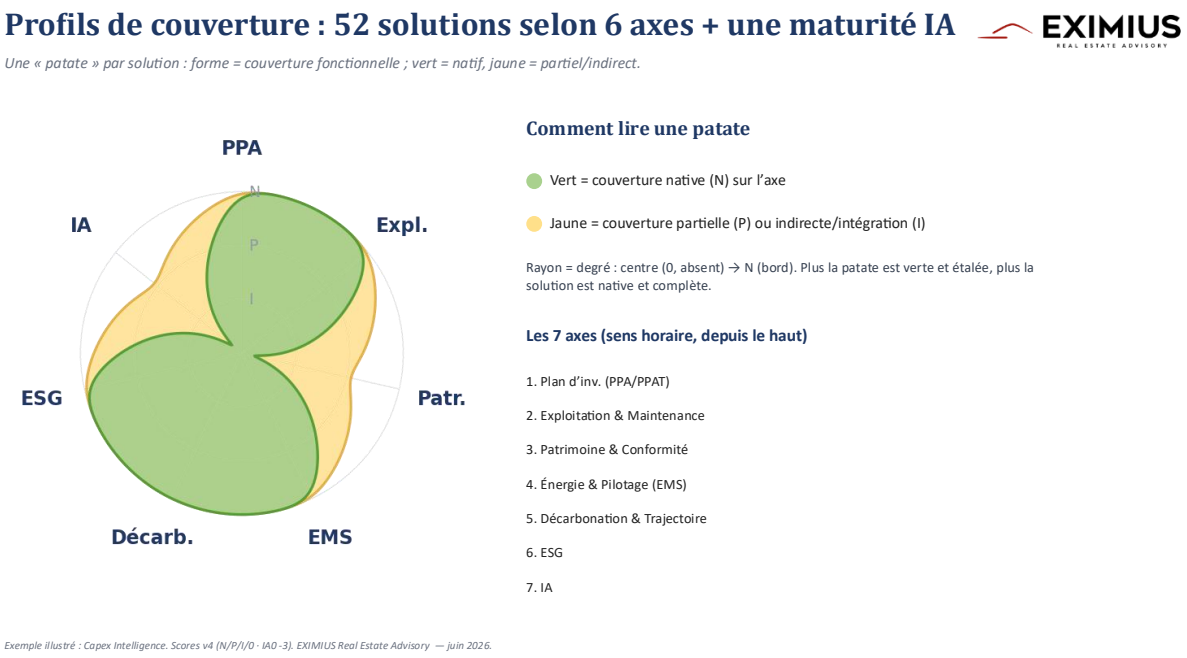


Figure 2 - Coverage footprint on the six functional axes and the AI component: N = native, P = partial, I = integration/indirect, 0 = not covered; IA0 to IA3 for artificial intelligence; this figure is illustrative and aggregates P and I (source: EXIMIUS study).

Overview: what the mapping reveals

First finding: **assets and compliance** form the most widely addressed axis. Forty-three solutions out of 52 cover it natively or partially, 16 of them natively; 47 address it if indirect integrations are included. At the other end, **energy/EMS** remains the most specialised capability: 21 solutions cover it natively or partially, while 17 show no identified coverage.

Second finding, more discriminating: displayed breadth often masks shallow depth. For twenty solutions (38%), none of the six functional axes studied appears as a core capability covered natively and fully; only seven are native on three axes or more. Operation and maintenance illustrates this bias: it is dominated by "partial" (28 solutions) and rarely native (4). As for ESG, no solution ignores it, but it is most often handled indirectly (26 solutions) and rarely as a core function (5). This finding does not invalidate the value of these tools; it invites us to distinguish their real core use from their declared coverage.

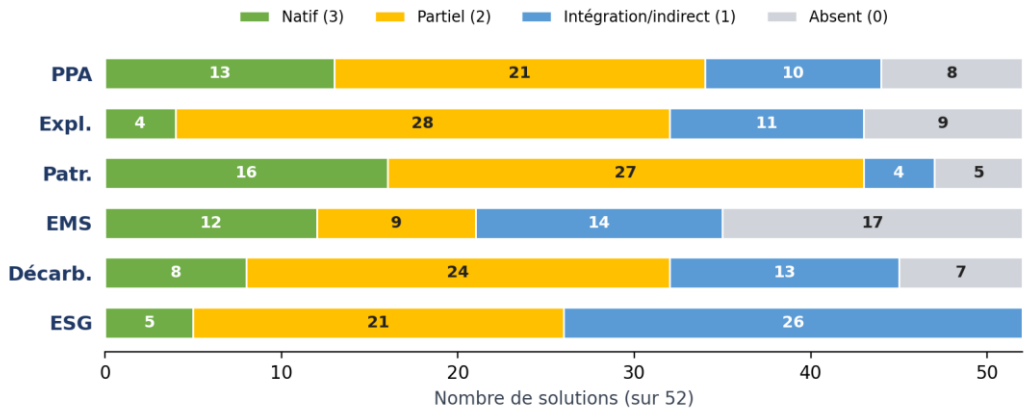


Figure 3 - Depth of coverage by axis (native / partial / indirect / absent), on 52 solutions.

Third finding:**artificial intelligence remains emerging**. Thirty-one solutions out of 52 (60%) are at level IA0 or IA1; only five reach a prescriptive level (IA3). The "augmented" promise is still, for the most part, a promise.

The 2D map does not compare perfectly homogeneous objects; it projects coverage profiles onto two conventional dimensions. The vertical axis mainly summarises the run (layers 1 and 2); the horizontal axis, planning and arbitration (layers 3 and 4). It brings out four reading zones:

- Top right, the most integrating ERPs and operating platforms (strong plan and run),
- Top left, the technical foundations and building data (strong run, moderate plan),
- Bottom right, the decision, valuation and market data tools (strategy-oriented, weak run),
- Bottom left, partial niche coverage.

Notably, the highest positions on the score signal broad weighted coverage, not universal superiority. Capex Intelligence and Lowit illustrate this profile, ahead of several ERPs and integrating platforms; none of these positions implies homogeneous native depth on all axes.

The map therefore serves to bring profiles together, then to choose the two or three axes that really discriminate for the use case.

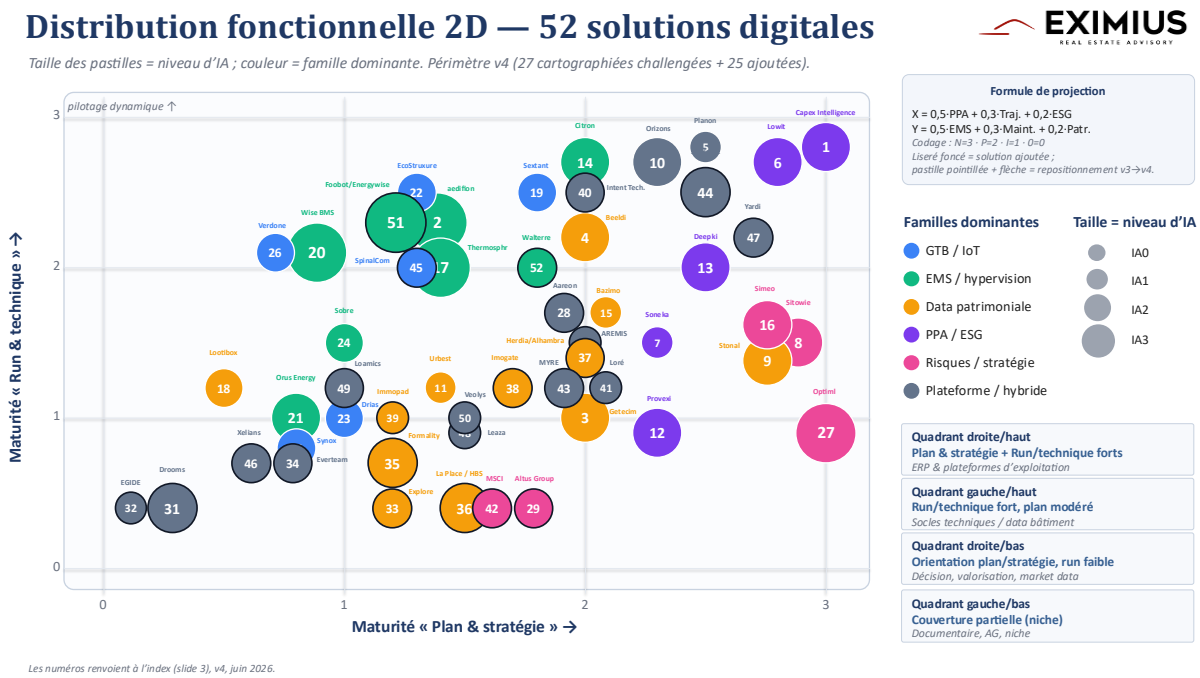


Figure 4 - 2D functional distribution of the 52 solutions (source: EXIMIUS study, June 2026).

Six families, a reading by layers

The dominant families are a typology built for the study. They are not exclusive categories: several solutions combine several layers, and their assignment reflects the role judged to be the main one in the light of the documentation available. Families and layers echo each other: the BMS/IoT foundations are anchored in layer 1, the EMS/hypervision platforms in layer 2, asset data in layer 3.1, the PPA/ESG pivots as well as the hybrid platforms and ERPs in layer 3.2, the risk and strategy tools in layer 4.

It is this double reading (main layer in columns, dominant family in colours) that figure 5 shows: fourteen solutions are thus anchored in layers 1 and 2, twelve in layer 3.1, twenty-one in layer 3.2 and five in layer 4.

The BMS/IoT foundations (Sextant, EcoStruxure, Drias, Synox, Verdone, SpinalCom) capture and supervise technical data: strong on the run, weak on the strategic plan.

The **EMS/hypervision platforms** (aedifion, Citron, Thermosphr, Wise BMS, Orus Energy, Sobre, Foobot, Walterre) go further by acting on energy and operations.

The family of **asset data** (Getecim, Beeldi, Stonal, Urbest, Bazimo, Lootibox, Explore, Formality, La Place/HBS, Herdia, Imogate, Immopad) is native on assets and compliance, partial elsewhere.

The **PPA/ESG pivots** (Capex Intelligence, Lowit, Deepki, Provexi, Soneka) offer the most multi-axis native coverage: they are the natural candidates for the role of asset "conductor".

The tools for **risk & strategy** (Optiml, Simeo, Sitowie, MSCI, Altus) excel at decision-making, valuation and trajectory, but neglect operations.

Finally, the **hybrid platforms and ERPs** (Planon, Aareon, Sopra, Yardi, Intent, MYRE...) cover a wide range, but often partially or indirectly: their value lies in integration, rarely in business depth on a given axis.

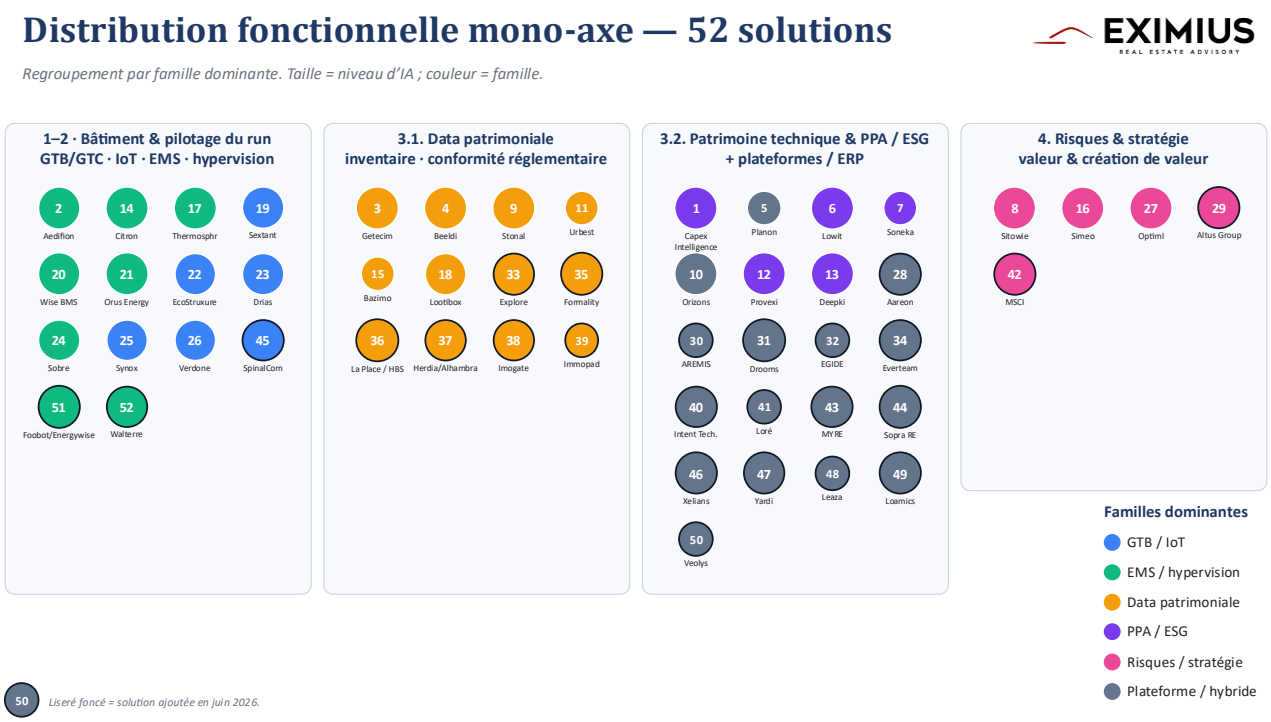


Figure 5 - Positioning of the 52 solutions by main anchoring layer (in columns: layers 1-2, 3.1, 3.2 and 4) and by dominant family (in colours) (source: EXIMIUS study).

BMS supervision / hypervision: the technical expertise that turns data into action

One lesson deserves to be singled out, because it goes to the heart of value. The study distinguishes two purposes of use that are often confused. The first aggregates and reports data - dashboards, reporting, asset databases - without leaving the scope of information management. The second connects operationally to the BMS (GTB/GTC) and to technical equipment: it goes down to the level of the control points, detects drifts, re-optimises setpoints and, for the most advanced, controls the installations in a closed loop. It is the one that can act directly on consumption, rather than only displaying it - and it is rare: EMS is the least covered axis of the study (12 native solutions, 17 absent). This dividing line matches that of the layers: the first population remains mainly located in layer 3, that of information management; the second operates in layers 1 and 2, in contact with the building.

aedifion illustrates this family of platforms oriented towards run optimisation. According to its public documentation and the modules deployed, the solution connects natively to technical systems (HVAC in particular), automatically identifies anomalies, formulates actionable recommendations, then controls the equipment autonomously, taking weather and use into account. The vendor claims savings exceeding 10%, with an average of around 22% in its published cases - and, above all, a decisive organisational effect: moving from a manual search for drifts to prioritised management. Consequence: less time spent by **energy managers and maintenance teams** tracking drift, operations that shift from reactive to proactive, installations under less strain. In a context of shortage of technical skills, this lightening of the workload is a benefit as important as the energy saving itself.

In practice, telling an operational interfacing capability from mere veneer means checking a few markers:

- **Connectivity:** open protocols, APIs, granularity of points, read rights and, where applicable, write rights.
- **Data quality:** semantic mapping, time-stamping, completeness, detection of faulty sensors and recovery of history.
- **Analytics:** automatic detection of drifts and faults, prioritisation and explainability of recommendations.
- **Control:** scope of the setpoints that can be changed, human validation, safety limits, degraded mode, traceability and sharing of responsibilities.
- **Measurement of results:** baseline, weather/use normalisation, measurement and verification protocol, persistence of gains.
- **Integration and security:** creation of work orders, ISO 50001 evidence, OT/IT segmentation, identity management, logs and reversibility.

Other players in the panel analysed state, to varying degrees, that they have one or more of these capabilities: connection to technical systems, detection, recommendation or control. EcoStruxure (Schneider), Wise BMS (Nodewise, VINCI Energies group), SpinalCom, Thermosphr, Foobot or Walterre give illustrations of varying nature and depth. Their exact qualification must be confirmed module by module, according to the building, the control rights and the protocol for measuring gains.

Additional due diligence: AI, cybersecurity, sovereignty and long-term viability

Four subjects must be treated as selection due diligence. AI is part of the analysis grid; cybersecurity, hosting, reversibility and the long-term viability of vendors were not scored in a homogeneous way. They must therefore not be read as demonstrated absences among all vendors, but as points to be documented before any choice.

AI that is still largely descriptive

Behind the word "AI", the study distinguishes from absence (IA0) to autonomous prescriptive (IA3). The reality is sober: 60% of the solutions are at IA0 or IA1, that is at best descriptive analytics or alerting; only five solutions reach a prescriptive level (IA3). Native depth is also concentrated: for twenty solutions, none of the six functional axes studied appears as a core capability covered natively and fully. The combination of the two - see figure 6 - invites us to put promises of "autonomy" into perspective and to favour players able to demonstrate, with supporting cases, a measurable effect.

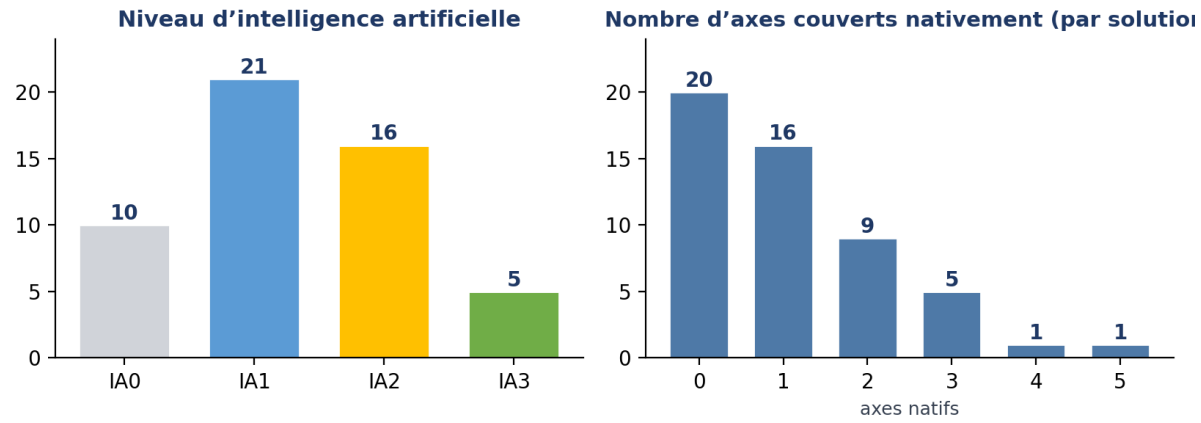


Figure 6 - AI maturity (left) and depth of native coverage per solution (right), on 52 solutions.

Cybersecurity, the blind spot of the connected building

The documentary scan does not make it possible to conclude on the code or internal architecture of each platform. It does, however, reveal heterogeneous public information. The tender must ask for evidence on security governance, OT/IT segmentation, identities and authorisations, encryption, logs, vulnerability and patch management, penetration tests, incident response and continuity. ISO/IEC 27001 covers the information security management system; the IEC 62443 series targets industrial automation and control systems; NIS2 applies only to the entities falling within its scope.

Hosting, data sovereignty and reversibility

The location of the cloud is not enough to qualify sovereignty. One must examine the operator, the applicable jurisdictions, the subcontractors, control of the keys, export formats and APIs, exit times and costs, deletion of data, backups and, if necessary, escrow or continuity mechanisms.

Long-term viability of vendors: a market that is reshaping itself

Beyond functionalities, the market is consolidating. La Place de l'Immobilier joined Stonal in October 2023; Citron announced the acquisition of iQspot in June 2025; Deepki announced the acquisition of Sobre Énergie in February 2026. These operations can broaden functional coverage, but also create roadmap, compatibility, concentration and support issues to be checked.

The long-term viability of the vendor must therefore be assessed as a due diligence check in its own right: shareholding structure, financial trajectory, support resources, service commitments, business continuity, reversibility and fate of the data.

Any insolvency proceedings cited in a publication must be named, dated and sourced; failing that, the allusion must be removed.

From the scan of solutions to the BIS/BOS architecture

The scan of the 52 solutions documents the functional coverage claimed; it is not enough, on its own, to qualify the digital architecture of a portfolio. The 2026 review by the Smart Buildings Alliance (SBA) on BIS/BOS approaches provides a complementary framework: a high-performing system does not result from the juxtaposition of tools, but from organised continuity between source systems, shared reference data, business applications and data governance.

The results of the study converge with this finding: for twenty solutions, none of the six axes studied is covered natively and fully; coverage is often partial or obtained through integration. The selection question therefore cannot only be “which solution covers the most functions?”, but also “into which architecture does this solution fit, with which data, interfaces, responsibilities and conditions for keeping it in service?”

The four layers of the study describe the value chain, from the instrumented building to asset arbitration. BIS/BOS describes the technical and organisational conditions that allow it to work: interoperability, shared data reference, governance of access and updates, cybersecurity, reversibility and maintenance in operational condition. The BOS is therefore not to be confused with a supervision, EMS or planning platform; it denotes a cross-cutting capability to organise exchanges between these applications over the long term.

Lessons for decision-makers: choosing a target architecture

From this overview a method emerges, more than a ranking: using the typologies to choose what to equip oneself with, provided the intended use is defined first. It comes down to a few principles:

- **Think “target architecture”, not “tool”: a reliable data/asset foundation (layers 1 and 3.1), an EMS/control layer that really acts (layer 2), a PPA/ESG decision layer linked to financial arbitration (layers 3.2 and 4) - rather than a single platform supposed to do everything.**
- **Be wary of the functional breadth displayed**: require proof of native coverage on the two or three axes that really structure the asset concerned, backed by use cases and measured results.
- **Favour action over observation**: on energy, prefer the solutions that interface with the BMS and control the equipment to those that merely display curves.
- **Write into the specification the long-term viability of the vendor, interoperability and data reversibility**, as well as cybersecurity requirements (ISO 27001, IEC 62443, NIS2).
- Measure value, not functionality: the right question is not “what does the tool do?”, but “which asset decision does it make possible?”.

Seven proofs to require before pre-selecting a solution:

- 1. PPA/PPAT: show a scenario that is quantified, prioritised, versioned and linked to its assumptions.
- 2. Operation and maintenance: follow a drift from its detection to the action, the owner and the contractual KPI.
- 3. Energy/EMS: specify whether the solution observes, recommends or controls - and demonstrate the rights, safeguards and results.
- 4. Assets and compliance: open the record of a piece of equipment with its source, history, evidence and associated obligation.
- 5. Decarbonisation: link a portfolio trajectory to actions per asset and to their CAPEX.
- 6. ESG: distinguish what is calculated natively from what is imported, transformed or only exported.
- 7. AI: demonstrate the real level IA0-IA3, the data used, explainability, human control and a measured gain.

To these seven proofs are added three cross-cutting due diligence checks: cybersecurity, reversibility and long-term viability of the vendor.

The real dividing line does not separate "good" and "bad" tools. It distinguishes the coverage that remains isolated from the coverage that fits into an architecture able to organise, from the building layer to the arbitration layer, proof, decision, action and measurement of the result. Technical data then becomes an asset: it reduces uncertainty, makes arbitration governable and makes it possible to stand by a CAPEX/OPEX trajectory.

Sources used

- French Ministry for the Ecological Transition - Éco Énergie Tertiaire
- French Ministry for the Ecological Transition - RE2020 environmental regulation
- European Commission - Omnibus I package relating in particular to the CSRD
- ISO - ISO/IEC 27001, information security management system
- IEC - understanding the IEC 62443 series
- EUR-Lex - Directive (EU) 2022/2555, known as NIS2
- Smart Buildings Alliance - BIS/BOS : une dynamique engagée, des défis à relever [BIS/BOS: momentum under way, challenges to be met] - 2026 review (pp. 4-5, 17-19 and 24-30)

Annex - Index of the 52 solutions

The reference table below decodes the numbers shown on the maps in figures 4 and 5; the colour recalls the dominant family and the column of figure 5 indicates the main anchoring layer.



Figure 7 - Index of the 52 solutions (source: EXIMIUS study, June 2026).

Methodological notes

EXIMIUS Real Estate Advisory study, June 2026. 52 solutions on the market for the technical management of built assets, scored qualitatively on six functional axes - Native (own coverage), Partial, Integration/indirect, Absent - and on a separate artificial intelligence component (IA0 to IA3).

Each solution is also attached to a main anchoring layer within a management chain in four layers: building and data (1), run management (2), knowledge and planning (3.1/3.2), arbitration and value (4). Map projection: X = 0.5·PPA + 0.3·decarbonisation + 0.2·ESG; Y = 0.5·EMS + 0.3·maintenance + 0.2·assets (coding N=3, P=2, I=1, 0=0).

Sources: vendor websites, public documentation and press releases. The positions are relative and intended to inform a pre-selection, not to establish an absolute ranking; the identification of vendors, the figures claimed by vendors and the capital transactions cited are to be revalidated at the date of a decision.