

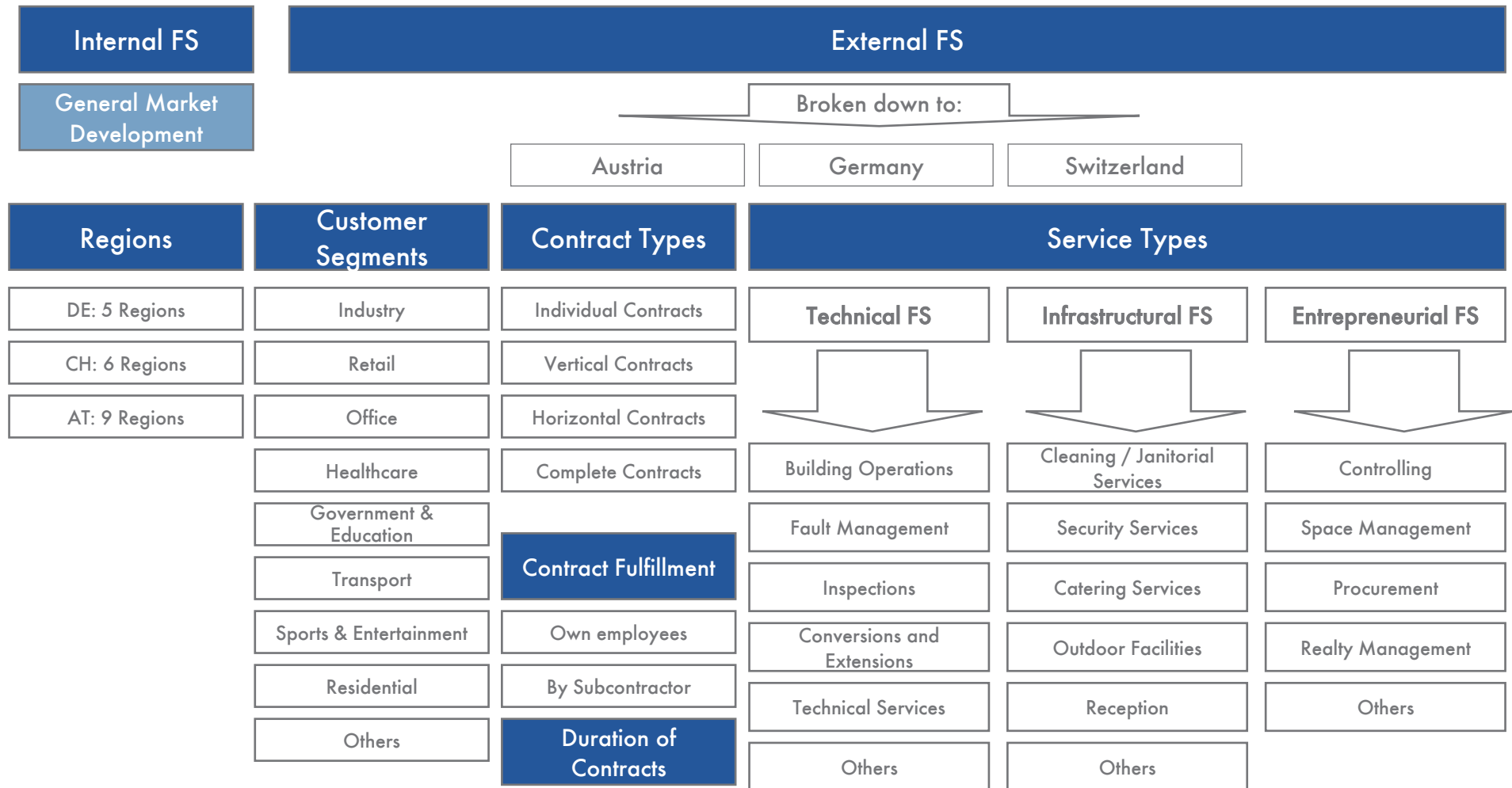
IC Market Tracking®
Facility Services in:
Germany, Austria, Switzerland
(DACH)
2020

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Your Benefits at a Glance

- ✓ Overview of the development of the **Total Market** and the **Individual Market Segments**.
- ✓ **Market Forecasts** for all segments and regions for the upcoming three years, based on our econometric models.
- ✓ **Competition Analysis with Provider Market Shares** and development of the last two years compared to the biggest competitors and with respect to:
 - Total Market
 - Regions
 - Service Types: Technical FS, Infrastructural FS, Entrepreneurial FS and Segments
- ✓ Information about the most important **Factors of Influence** for the Facility Services Markets
- ✓ Graphic Presentation and interactive charts and tables ensure a rapid implementation of the data.
- ✓ Pivot (excel tables) with company market shares by country, regions and segments for an interactive research.





For all segments the „External Facility Services Market“ is used as a basis. However we also provide information, how big the overall total market (internal + external services) is. For each segment we analyse the market size of the last 2 years und give a forecast for the next 3 years. In the competition analysis we show the market shares of the biggest companies as a whole as well as the most important segments and regions broken down.

| Regions in Austria | Regions in Switzerland | Regions in Germany | |
|--------------------|---------------------------------|--------------------|--|
| Burgenland | Zürich & Schaffhausen | North | Hamburg, Schleswig-Holstein, Niedersachsen, Bremen |
| Carinthia | Northwestern Switzerland & Bern | East | Neue Länder, Berlin |
| Lower Austria | West Switzerland & Wallis | West | Hessen, Nordrhein-Westfalen |
| Upper Austria | Eastern Switzerland | Southeast | Bayern |
| Salzburg | Central Switzerland | Southwest | Baden-Württemberg, Saarland, Rheinland-Pfalz |
| Styria | Ticino | | |
| Tirol | | | |
| Vorarlberg | | | |
| Vienna | | | |

Definitions and Demarcation

Service Types

Technical FS (Hard)

HVAC, Controls & Automation, Electrical Engineering, Energy Management, Technical Maintenance, etc.

Infrastructural FS (Soft)

Janitorial Services, Cleaning, Security, Catering, Waste Disposal, Snow Removal, Pest Control, Landscaping, etc.

Entrepreneurial FS

Controlling, Property Accounting, Property Management, Inventory, Procurement, Space Management/Planning, etc.

Abbreviations

CAGR

Compound Annual Growth Rate over the period 2018 – 2023f

Avg. Share

Average Market Share over an existing period (e.g. several years)

2020e/2023f

Estimated/Forecasted

Turnover

Turnover is stated in 1 Mio. Euros. Values are always net turnover values (not list-prices), including discounts.

Contract Types

Individual Contracts

Contract for one individual Service Type

Vertical Contracts

Contract for several Services within one service group (e.g. only technical)

Horizontal Contracts

Contract for different service types combined into one package

Complete Contracts

Contract for all 3 service types

Contract Fulfillment

Internal

Own company

External

Subcontracting

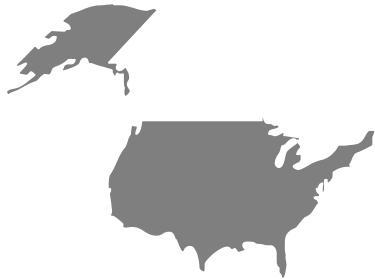
Definitions and Demarcation

| Customer Segments | |
|------------------------|---|
| Industry | Production buildings, production halls, warehouses, etc. |
| Retail | Trade, shopping centers, etc. |
| Office | Office buildings, banks, financial institutions, etc. |
| Healthcare | Hospitals, clinics, social institutions, etc. |
| Government & Education | Public administration, military, schools, universities, etc. |
| Transport | Airports, bus stations, railway stations, public transport facilities, etc. |
| Sports & Entertainment | Stadiums, recreation facilities, cinemas, etc. |
| Residential | 1- family, 2- family dwellings and flats |
| Others | Public buildings, conference centers, museums, hotels, etc. |



Offer Facility Services

- Germany
- Austria
- Switzerland
- UK
- France
- Spain
- Italy
- Belgium
- Netherlands
- Poland
- Slovakia
- Czech Rep.
- Slovenia
- Hungary
- Croatia
- Serbia
- Norway
- Sweden
- Finland
- Denmark
- USA
- Other country reports can be created on request

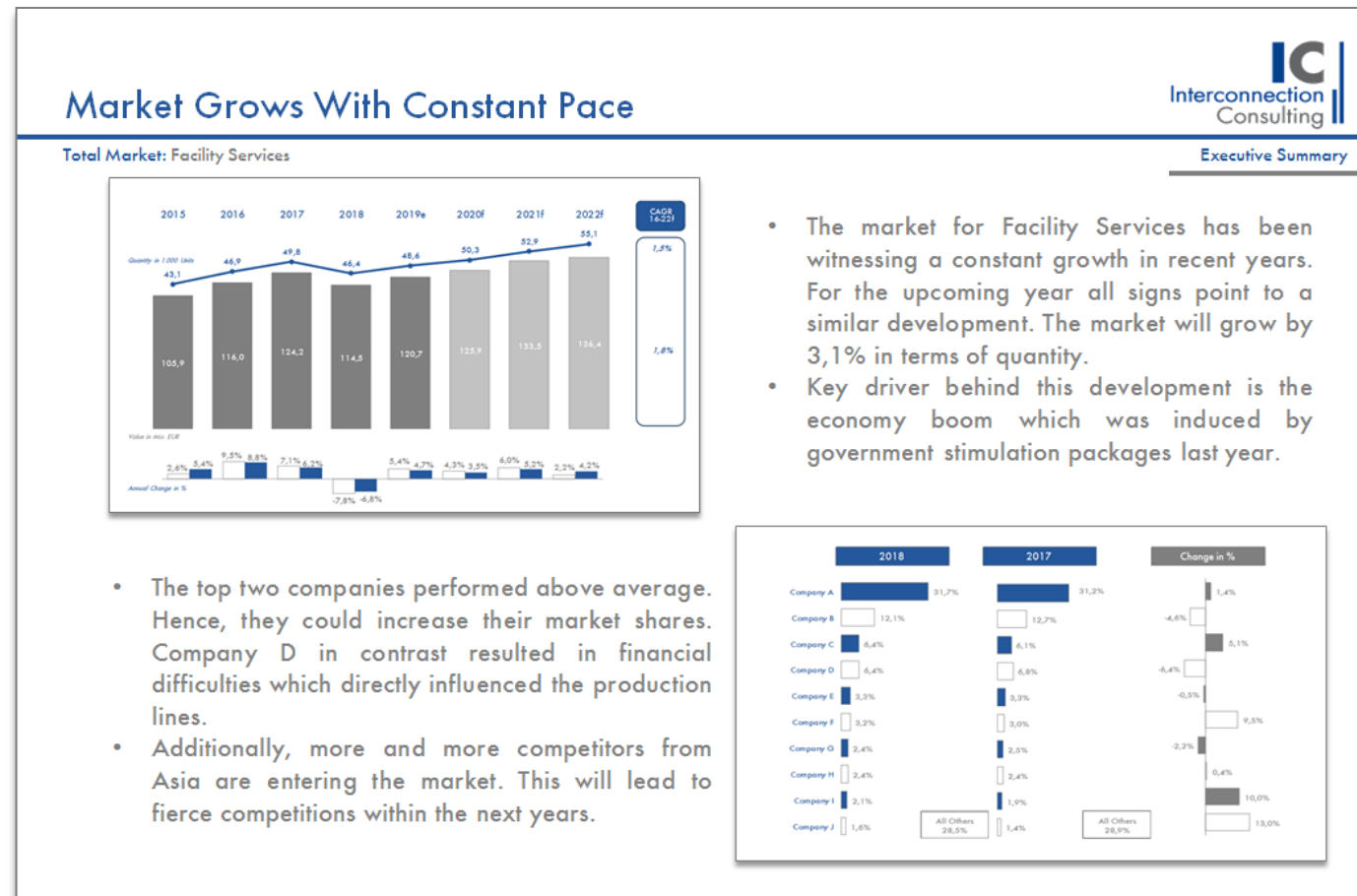


The IC Market Tracking® is modularly built and consists of the following sections:

- The **Introduction** shows the definition and demarcation of services, sub services, regions, and methodology as well as the objectives of the study.
- The **Executive Summary** gives a short overview of the results of the study and analyses key facts.
- As an introduction key factors influencing the market of facility services are analysed in the **Economic Environment**: You will find the most important data on construction, commercial sector, etc., as well the main economic indicators influencing the market.
- The **Total Market Analysis** shows the development of the market surveyed by value and quantity in different dimensions, such as services, sub services, regions and segments. A forecast for the next years is an essential part of this analysis.
- The **Competition Analysis** shows in detail the development of the top companies within the facility services market by finding out about the market shares in different categories, changes in market position, benchmarks, average prices, etc.
- Finally, all data are documented in the table section, also called **Facts & Figures**. Here you will find all absolute and relative sales figures of the top companies in order to check our results.

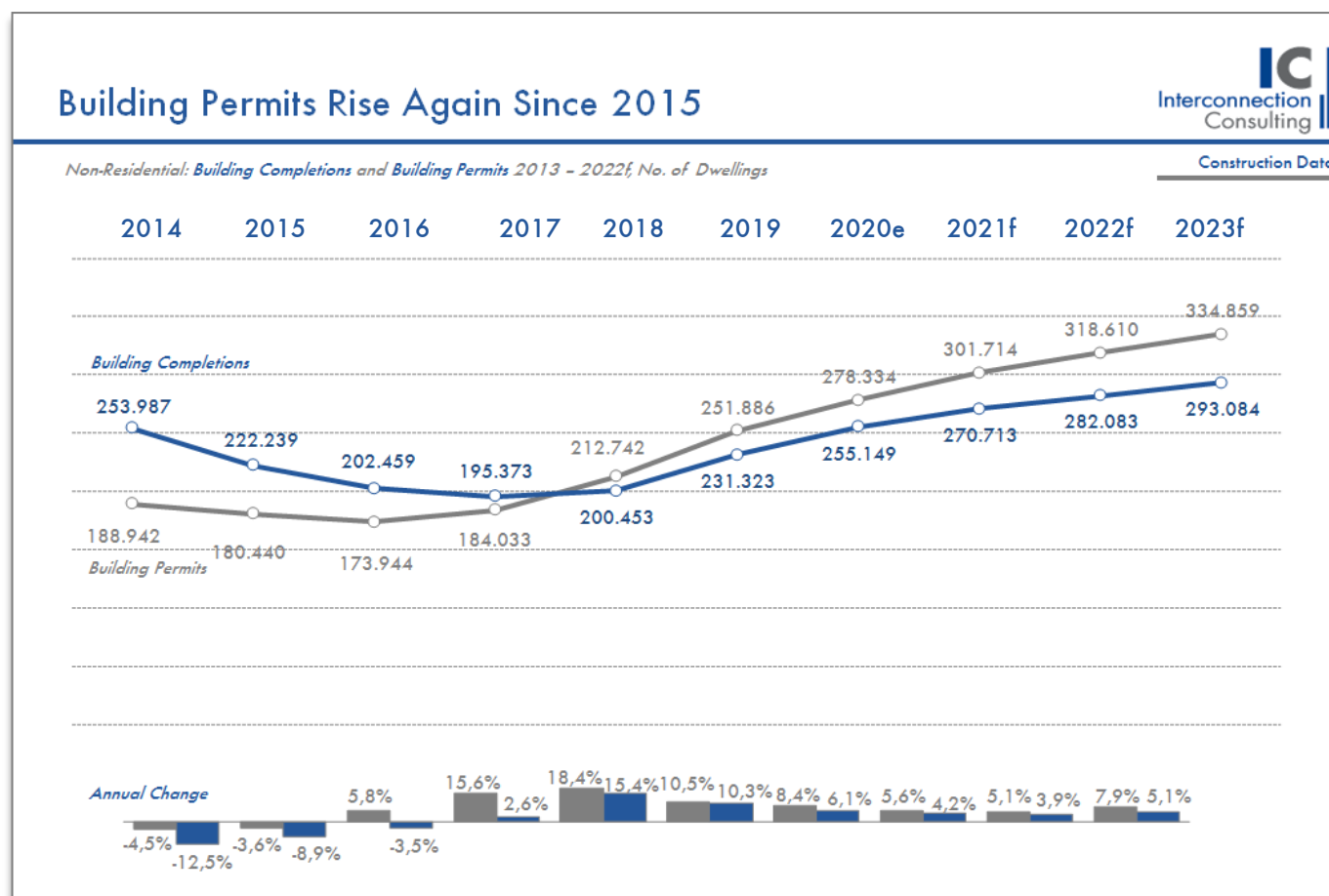
Executive Summary at the Beginning of the Report

- The executive summary comprises all relevant information of the report with focus on forecast and competition situation.
- *This chart shows dummy figures.*



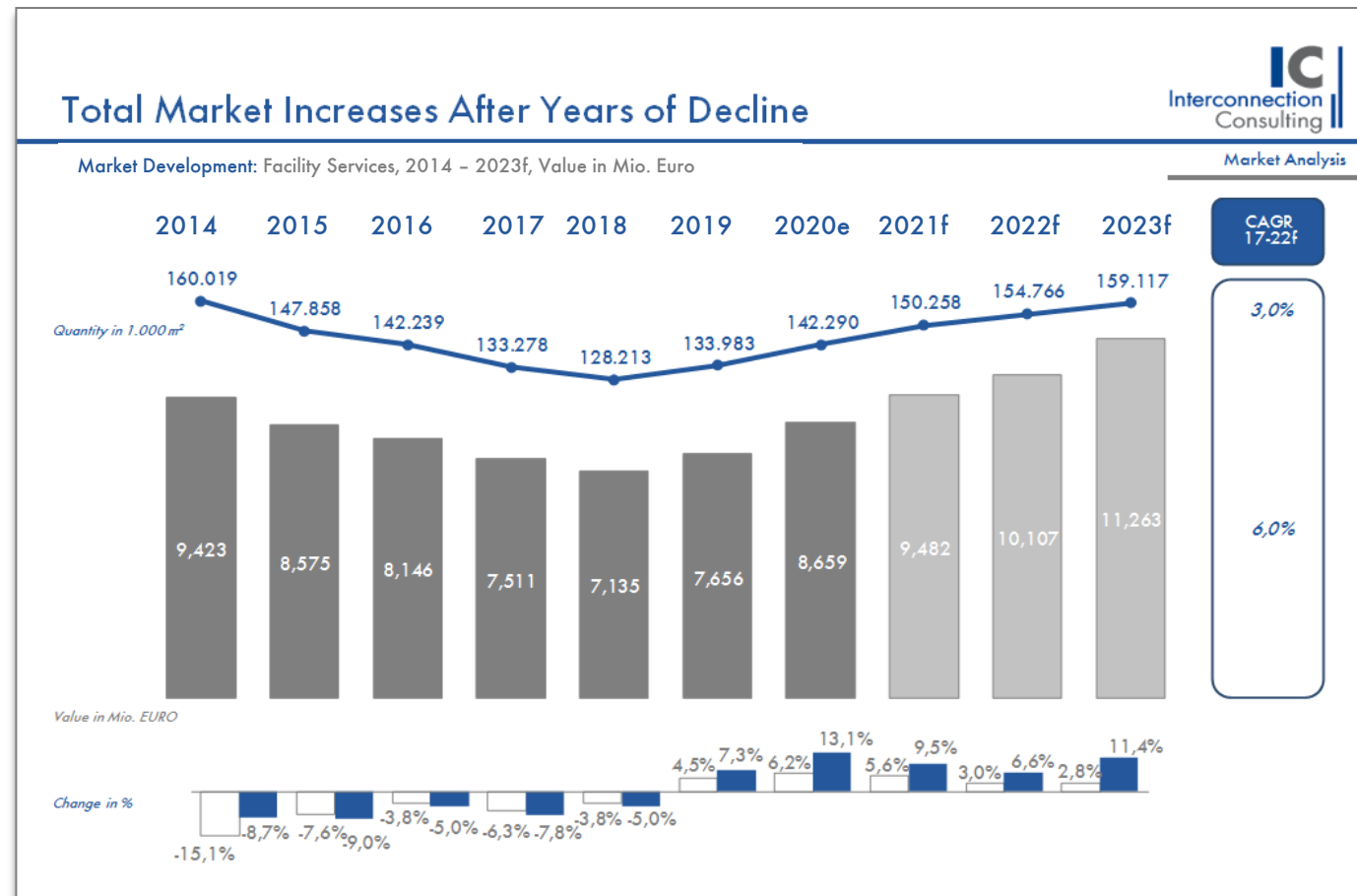
Market Environment Data of Our Forecasting Model

- The data for the market environment consist of main factors such as general economy data, demography, income statistics, construction environment and sentiment indicators.
- *This chart shows dummy figures.*

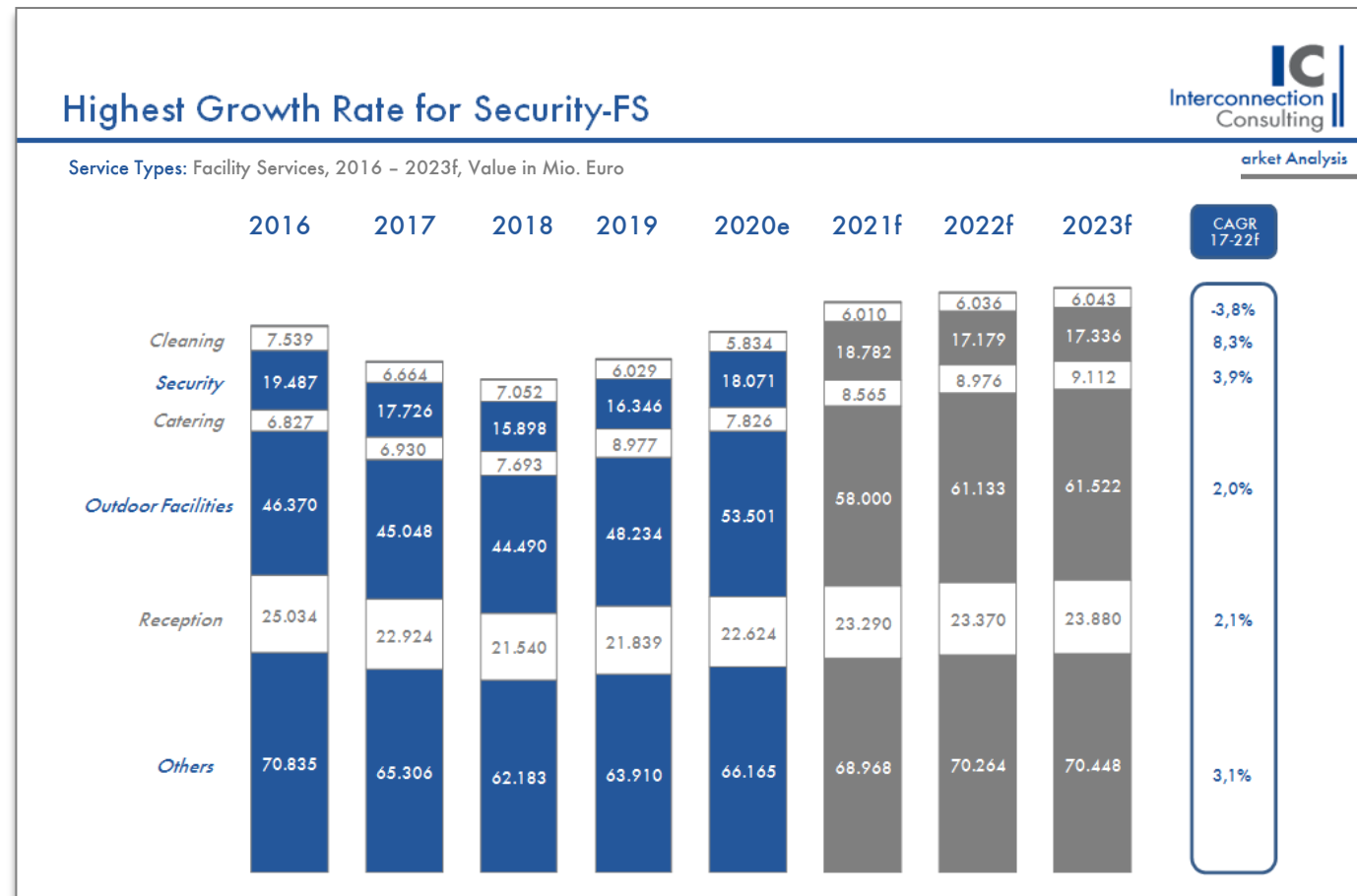


Total Market Development and Forecast

- Overview of the total market in terms of quantity and value.
- Development until the current year and forecast for the upcoming three years.
- *This chart shows dummy figures.*

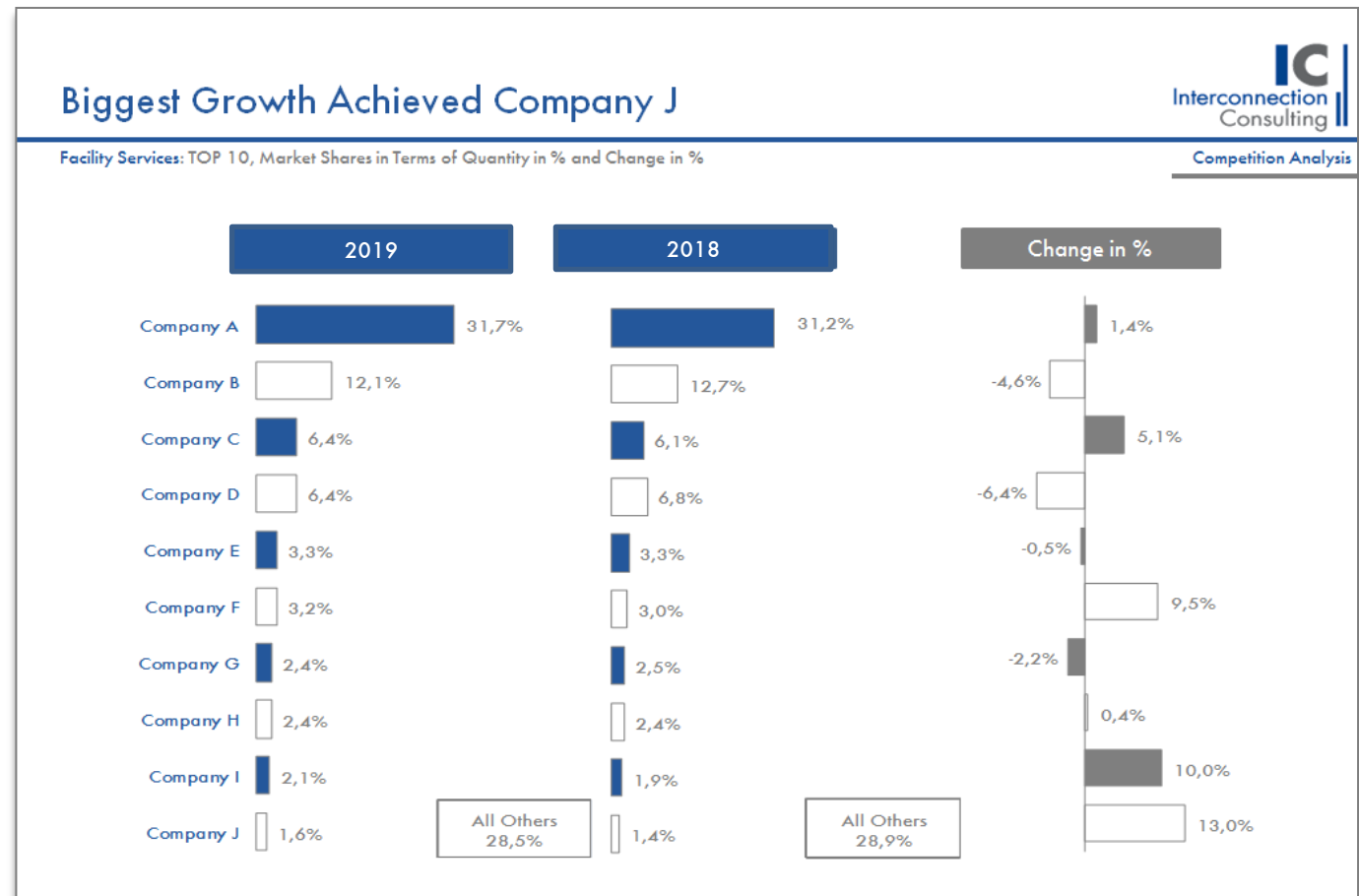


- Overview of the segmentation as well as a Forecast for the upcoming three years about their development.
- *This chart shows dummy figures.*



Competition Analysis and Market Shares

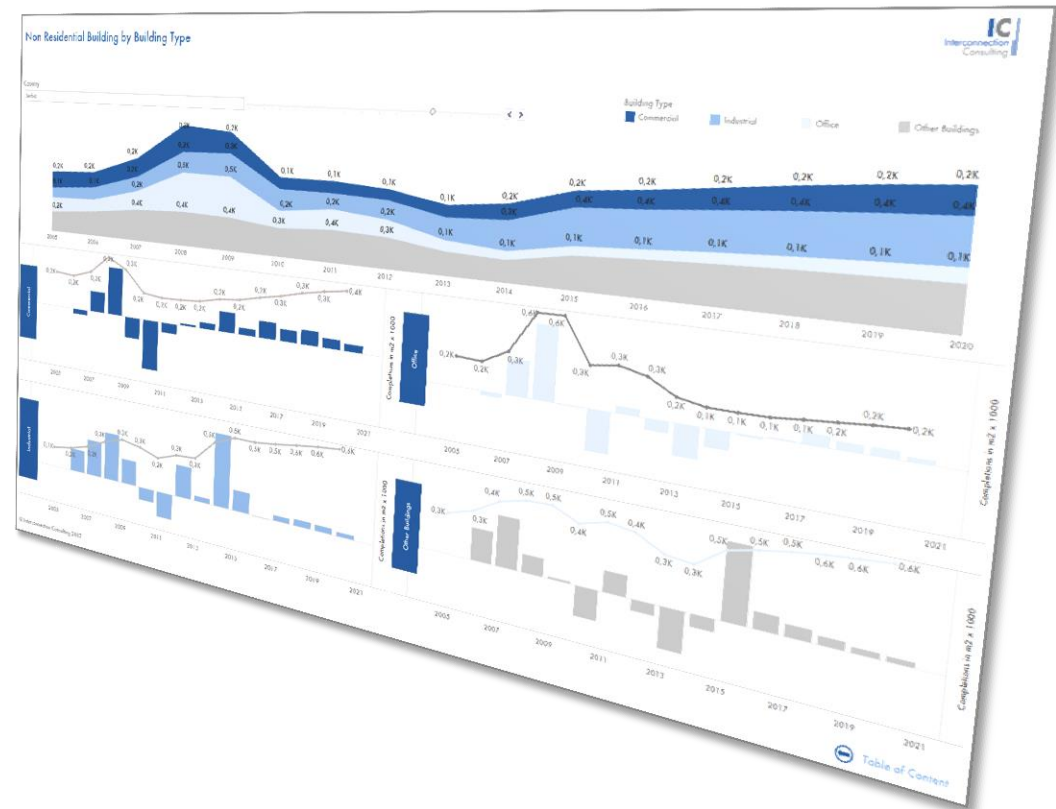
- You will receive a competition analysis of the top companies for the overall market and all segments.
- The included pivot table (or Tableau visualization) provides data for all companies.
- *This chart shows dummy figures.*



IC Cockpit-Solution

Online Tool with Interactive Dashboards Presenting the Data

- We provide you also the possibility to **implement all data** in a **dashboard solution** based on Tableau.
- Together we will **define** what the final **Tableau-Cockpit** should look like to present you the data in the most efficient way for your work.
- In course of a subscription of our reports, fees for the dashboard creations will only occur in the first year. In the subsequent years the updated market data will automatically be uploaded in the software.



Your Benefits at a Glance

A picture says more
than 1000 words

- **Complex correlations** are visualized in the form of geo-, tree maps, bars, etc.

Interactive Dashboards
Updates annually

- Use **interactive dashboards** for quick implementation of the data, for potential estimations, for sales control, for success measurement, etc.

Easy online
accessibility

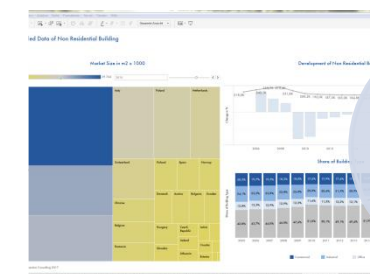
- Market data are available wherever you have internet access
- You can also **export** the data as .jpg, .csv or .pdf file



Data
Benchmark



2016-2022f



Market
Shares

- Additionally to the visualised report a Pivot Table will be included.
- With use of the analyse tool you can individually make selections of the available data to make comparisons of the development on years and segments by your own.
- Pivot tables are available for the competition analysis as well as for the total market and forecasts.

How to use Pivot Tables

1. Generally, the desired sub-categories (i.e. Technology - A) can be selected with the ordinary drop down menus.

| | |
|------------------------|----------|
| Technology | A |
| Distribution | (All) |
| Quarter | 4 |
| Quantity/Value | Quantity |
| Weight Classes | (All) |
| Country | Germany |
| Brand | (All) |
| Ø Price in € (Classes) | (All) |

| | |
|-----------|---------|
| Sum - # | |
| Segments | Results |
| Segment A | 18.592 |
| Segment B | 8.434 |
| Segment C | 5.310 |
| Segment D | 3.290 |
| Segment E | 1.332 |
| Total | 36.958 |

2. If you want to analyse a different category (i.e. Technology), click on the gray field and drag it down to the table.

| | |
|------------------------|----------|
| Distribution | (All) |
| Quarter | 4 |
| Quantity/Value | Quantity |
| Weight Classes | (All) |
| Country | Germany |
| Brand | (All) |
| Ø Price in € (Classes) | (All) |

| | | | |
|-----------|------------|--------|----|
| Sum - # | Technology | | |
| Segments | A | B | C |
| Segment A | 3.290 | 5.452 | 7 |
| Segment B | 5.310 | 8.925 | 21 |
| Segment C | 8.434 | 10.794 | |
| Segment D | 18.592 | 14.624 | 13 |
| Segment E | 1.332 | 2.229 | 6 |
| Total | 36.958 | 42.025 | 47 |

This chart shows dummy figures for illustration

IC Market Tracking® Facility Services in DACH 2020

IC Market Tracking® Facility Services in DACH 2020

Prices

| | Subscription * | Single Issue | Scale of Discounts |
|---------------------|----------------|------------------------|---|
| Single Country | € 3.500 | +25% for Single Issues | From a purchase price: € 7.000 -10% € 10.500 -20% |
| All 3 Countries ** | € 8.400 | | |
| 2 countries ** | € 6.300 | | |
| Available Countries | Germany | Austria | Switzerland |

* **Subscription:** 25% price advantage compared to single issue. The subscription can be cancelled after two purchases of the study, but not later than 31st December in the year in which the last study has been received. If the subscription is not cancelled, it is extended by one more year. The price is the individual price for at least two orders of the study (order year and the following year). Price changes must be announced by Interconnection at least six weeks before 31st December.

** **Price Special** (scale of discounts are not applicable, subscription applies)
Price includes an interactive PDF Document. All prices shown exclude sales tax

Our Market-Intelligence Tools



Our Ad-hoc research team disposes state of the art market intelligence tools to:

- analyze potential to increase turnover and profits
- provide an insight about customers needs and opinions
- identify new promising markets and business segments
- optimize your pricing strategies taking customer benefits and the competitive landscape into account

etc.



“Under a tough time constraint, Interconnection was able to deliver an outstanding study that exceeded my expectation in terms of quality and market breadth. I highly recommend Interconnection to anyone in need of market research.”

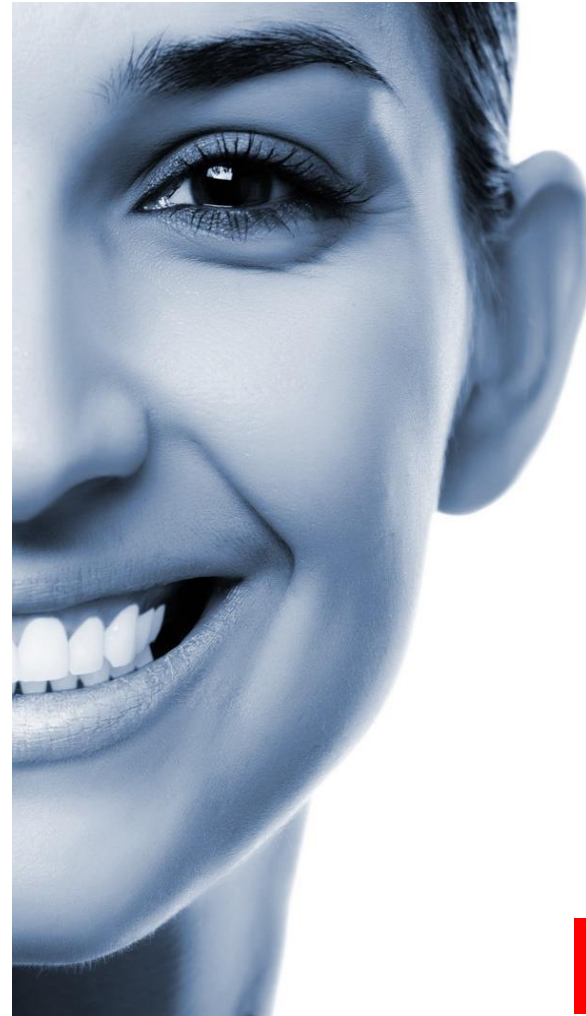
Jeff Canterbury, Schneider Electric U.S.



If there are any questions please
do not hesitate to contact us!

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Yes, we would like to order the IC Market Tracking® Facility Services DACH Region 2020

(Please, print out the order form and mark your desired products)

- ☐ Germany ☐ Switzerland
☐ Austria ☐ All 3 Countries

- ☐ Subscription* EUR 3,500.- / Country
☐ Single Issue EUR 4,375.- / Country
☐ Subscription* EUR 8,400.- / All 3 Countries
☐ Single Issue EUR 10,500.- / All 3 Countries

| | Single Issue | Subscription* |
|--|--------------|---------------|
| 25% price advantage | | ✓ |
| Interactive PDF, Excel Pivot | ✓ | ✓ |
| Web-Conference with the analyst free of charge | | ✓ |

Billing Address: (please fill in the data completely)

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VAT identification number: _____
E-Mail: _____

Delivery Address: (necessary if different from the billing address)

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Name: _____
Address: _____
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E-Mail: _____

| | | |
|------|------|-----------|
| Date | Name | Signature |
|------|------|-----------|

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Terms of Payment

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Scale of discounts

from 7,000.- EUR 10%
from 10,500.- EUR 20%