

**IC Market Tracking®**  
Facility Services in:  
Germany, Austria,  
Netherlands  
**2021**

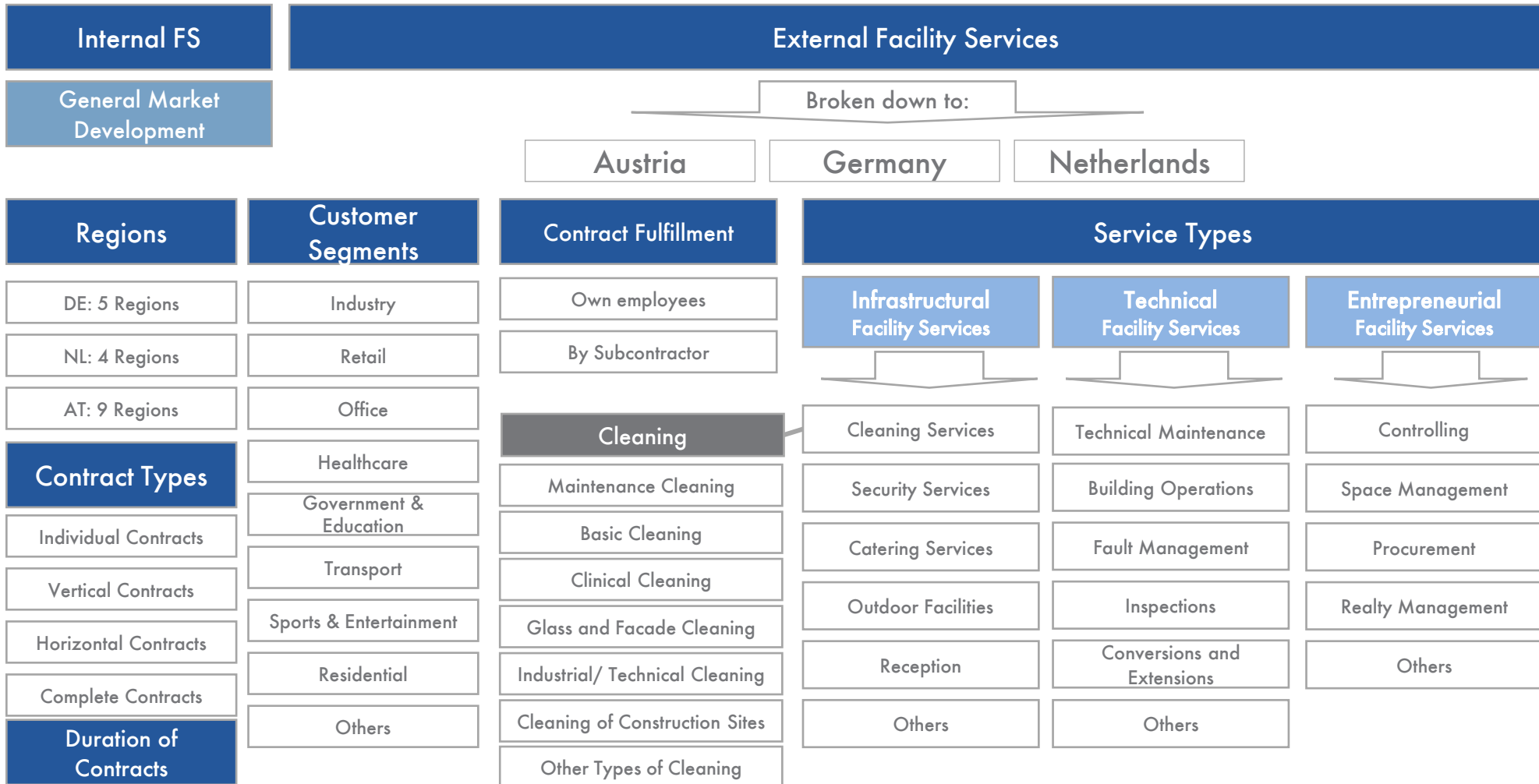
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# Your Benefits at a Glance

- ✓ 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
  - Customer Segments
  - Service Types:
    - Technical Facility Services (+ all sub-services)
    - Infrastructural Facility Services (+ all sub-services)
    - Entrepreneurial Facility Services (+ all sub-services)
- ✓ Information about the most important **Factors of Influence** for the Facility Services Markets
- ✓ Graphic Presentation in our interactive Dashboard ensure a rapid implementation of the data.
- ✓ Pivot (Excel tables) with company market shares by country, regions and segments for own calculations.



# IC Market Tracking® Facility Services in: Germany, Austria, Netherlands 2021



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 by customer segments, Service Types and by the sub-services for Infrastructural, Technical and Entrepreneurial Services.

# Definitions and Demarcation (Regions)

	4 Regions in Netherlands	9 Regions in Austria	5 Regions in Germany	
Utrecht, North- and South-Holland, Amsterdam	West	Burgenland	North	Hamburg, Schleswig-Holstein, Niedersachsen, Bremen
Zeeland, Nordbrabant and Limburg	South	Carinthia	East	Neue Länder, Berlin
Flevoland, Gelderland und Overijssel	East	Lower Austria	West	Hessen, Nordrhein-Westfalen
Drente, Groningen und Friesland (Fryslan)	North	Upper Austria	Southeast	Bayern
		Salzburg	Southwest	Baden-Württemberg, Saarland, Rheinland-Pfalz
		Styria		
		Tirol		
		Vorarlberg		
		Vienna		

# Definitions and Demarcation (Service Types)

## Service Types

Technical Facility Services (Hard)

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

Infrastructural Facility Services (Soft)

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

Entrepreneurial Facility Services

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

## Abbreviations

CAGR

Compound Annual Growth Rate over the period 2019 – 2024f

Avg. Share

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

2021e/2024f

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)

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

(Country reports which are either now available or which were carried out in the past)

- 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.

# Table of Contents of our Online Dashboard

## IC Market-Tracking - Facility Services

### Executive Summary

Executive Summary	
Marktentwicklung Übersicht I	>
Marktentwicklung Übersicht II	>
Wettbewerbsanalyse	>

### Total Market Analysis

Marktanalyse			
Gesamtmarkt	>	Extern vs. Intern	>
Regionen Überblick	>	Regionen Detail	>
Regionen Karte	>	Kundensegmente	>
Kundensegmente Detail	>	Servicetypen Übersicht	>
Infrastrukturelle Details	>	Technische Services	>
Kaufmännische Details	>	Subservices Details	>
Verträge	>	Outsourcing Servicetypen	>
Outsourcing Kunden-Seg.	>	Outsourcing Heatmap	>

### Competition Analysis

Wettbewerbsanalyse			
Regionen	>	Kundensegmente	>
Servicetypen	>	BCG Servicetypen	>
BCG Regionen	>	BCG Kundensegmente	>

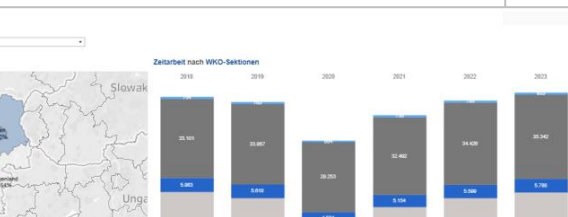
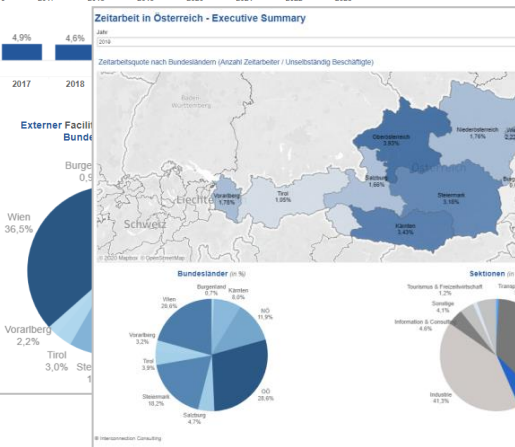
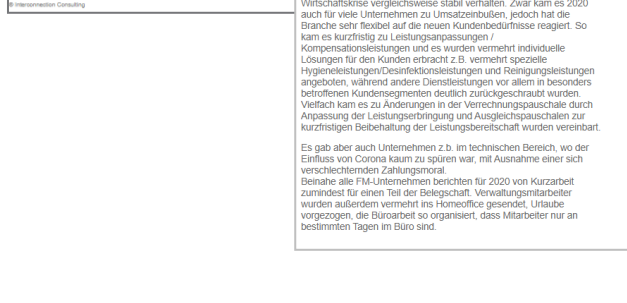
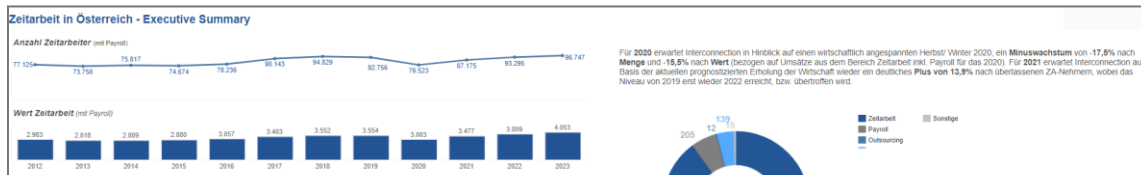


### Market Influencing Factors

Marktumfeld	
Baufertigstellungen - Nicht-Wohnbau Gebäudetypen	>
Allgemeine Wirtschaftsindikatoren	>
Leerstandsquote - Büroimmobilien	>
Unselbstständig Beschäftigte	>
Industrieproduktion	>
Einzelhandel	>

# Executive Summary at the Beginning of the Report

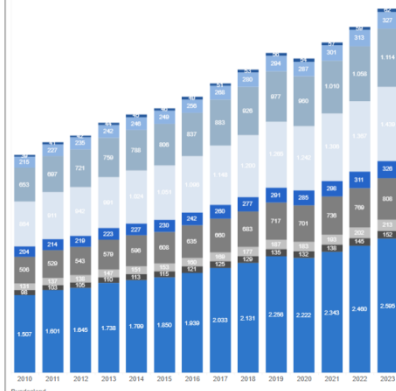
- In the summary you will find all the relevant information from the study, with a focus on key market figures, developments and the competitive situation.
- This example chart shows fictitious numbers.



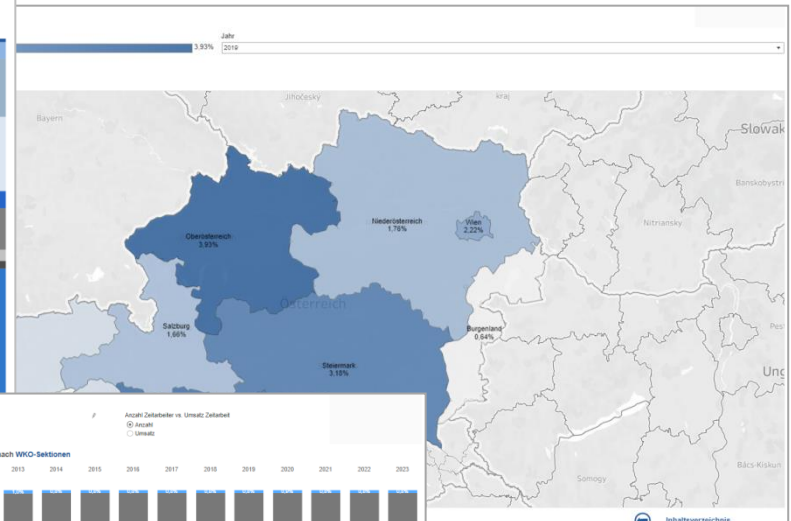
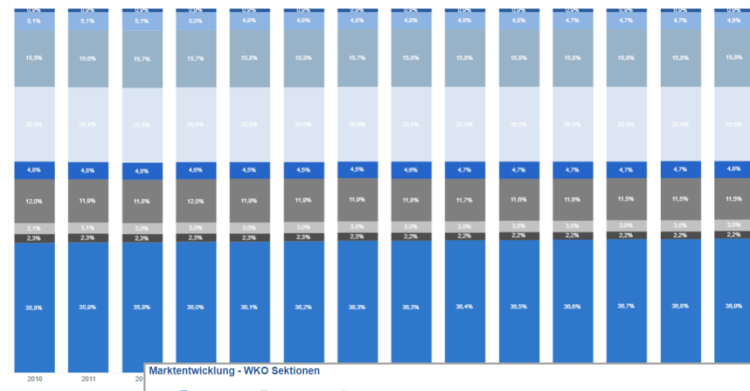
# Total Market Development, Market Shares and Forecasts

## Regionen

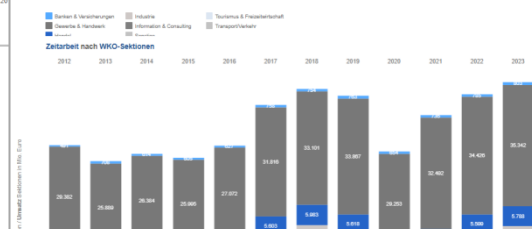
Externer Facility Services Markt nach Bundesländern (in Mio. Euro)



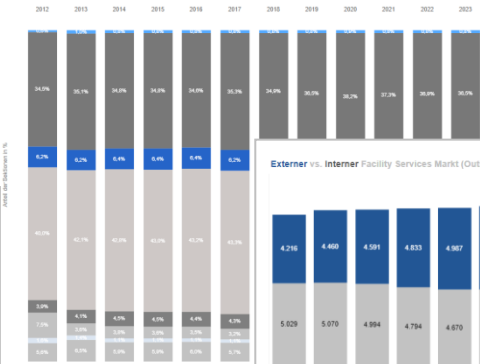
Externer Facility Services Markt nach Bundesländern (in %)



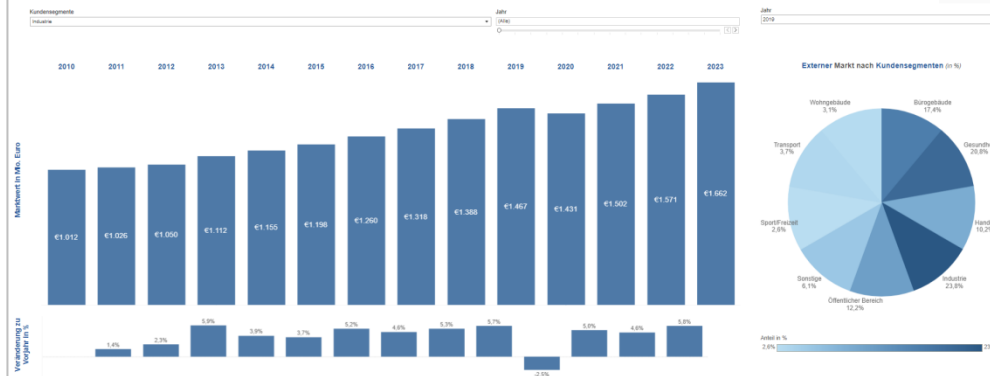
## Marktentwicklung - WKO Sektionen



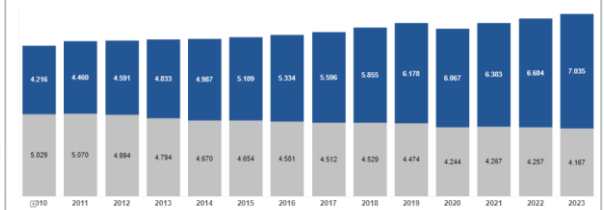
## Zarbeitszeit nach WKO-Sektionen



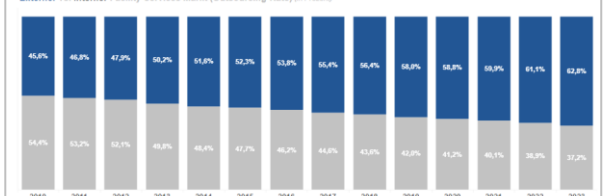
## Marktentwicklung - Kundensegmente



## Externer vs. Interner Facility Services Markt (Outsourcing-Rate)



## Externer vs. Interner Facility Services Markt (Outsourcing-Rate) in Prozent





# 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

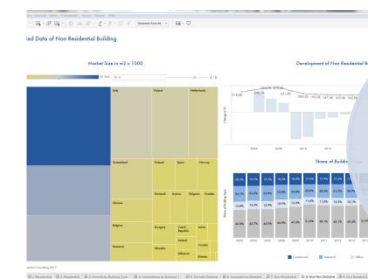
- Market data are available wherever you have internet access
- You can also **export** the data as .jpg, .csv or .pdf file



Data Benchmark



2016-2024f



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)
∅ 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
<b>Total</b>	<b>36.958</b>

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)
∅ 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
<b>Total</b>	<b>36.958</b>	<b>42.025</b>	<b>47</b>

*This chart shows dummy figures for illustration*

# IC Market Tracking® Facility Services in: Germany, Austria, Netherlands 2021

	Subscription *	Single Issue	Scale of Discounts
Single Country	€ 3.500	+25% for Single Issues	From a purchase price: € 7.000                    -10% € 10.500                   -16%
All 3 Countries **	€ 8.800		
2 countries **	€ 6.300		
<b>Available Countries</b>	Germany	Austria	Netherlands

\* **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 Canterberry, Schneider Electric U.S.



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

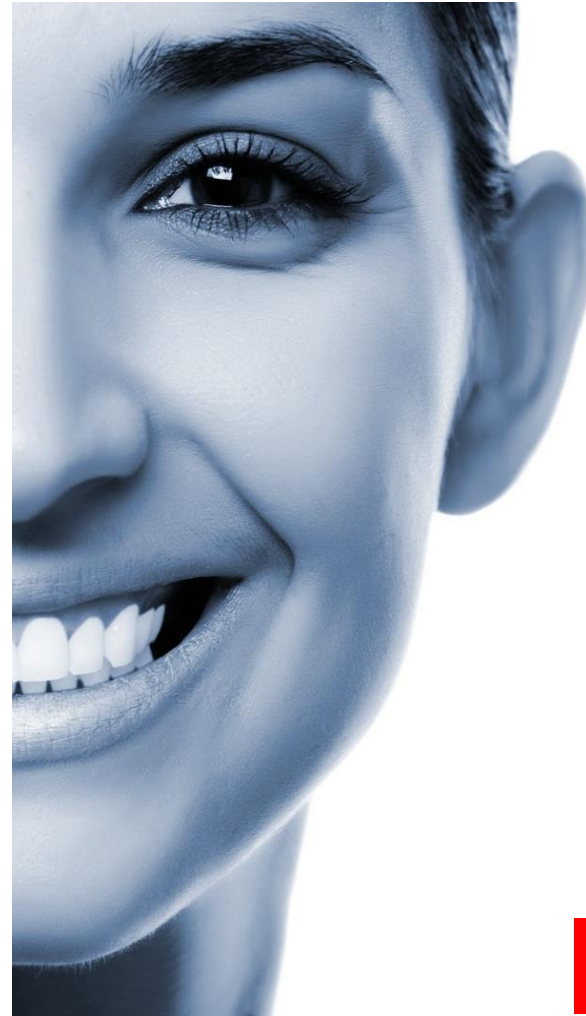
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**Inquiry**

**Yes, we would like to order the  
 IC Market Tracking® Facility Services 2021**  
 (Please, print out the order form and mark your desired products)

- Germany                                       Austria                                       Netherlands  
 All 3 Countries

- Subscription\* ..... EUR 3,500.- / Country  
 Single Issue ..... EUR 4,375.- / Country  
 Subscription\* ..... EUR 8,800.- / All 3 Countries  
 Single Issue ..... EUR 11,000,- / All 3 Countries

	Single Issue	Subscription*
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Web-Conference with the analyst free of charge		✓

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**Terms of Payment**

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**Scale of discounts**

- from 7,000.- EUR      10%  
 from 10,500.- EUR    16%