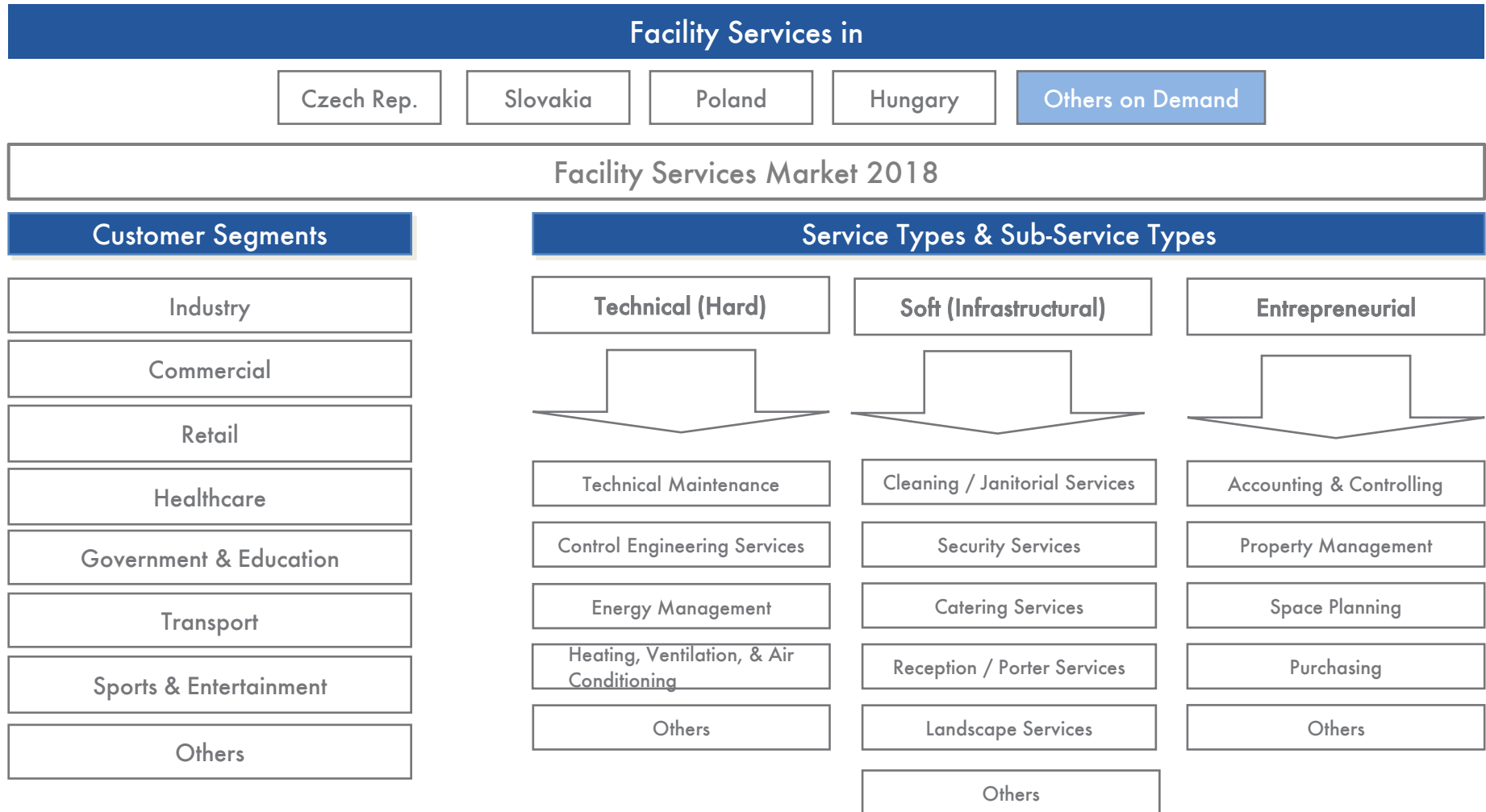# IC Market Tracking
Facility Services in CEE
2018

Your Benefits at a Glance

✓ Overview of the development of the **Total Market** and the **Individual Segments**.

✓ **Market Forecasts** for all product segments and regions for the upcoming three years, based on our econometric models.

✓ **Market Shares** and development of Top Players in the last two years and with respect to:
  - Total Market
  - Service Types: Technical FM, Entrepreneurial FM, Infrastructural FM
  - Customer Segments

✓ Information about the most important **Market Drivers**

✓ Overview of **Development of Segments** and **Market Positioning**

✓ Graphic Presentation of the results facilitates the development of your own strategies.

✓ Pivot (excel tables) with company market shares by country, regions and segments for an interactive research.

IC Market Tracking® Facility Services in Europe 2018

Interconnection Consulting

Facility Services in

| Czech Rep. | Slovakia | Poland | Hungary | Others on Demand |

Facility Services Market 2018

Customer Segments

- Industry
- Commercial
- Retail
- Healthcare
- Government & Education
- Transport
- Sports & Entertainment
- Others

Service Types & Sub-Service Types

Technical (Hard)

- Technical Maintenance
- Control Engineering Services
- Energy Management
- Heating, Ventilation, & Air Conditioning
- Others

Soft (Infrastructural)

- Cleaning / Janitorial Services
- Security Services
- Catering Services
- Reception / Porter Services
- Landscape Services
- Others

Entrepreneurial

- Accounting & Controlling
- Property Management
- Space Planning
- Purchasing
- Others

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.

Definition and Demarcation

Service Types

Technical (Hard)	HVAC, Controls & Automation, Electrical Engineering, Energy Management, Technical Maintenance, etc.
Soft	Janitorial Services, Cleaning, Security, Catering, Waste Disposal, Snow Removal, Pest Control, Landscaping, etc.
Entrepreneurial	Controlling, Property Management, Logistics, Space Planning, etc.

Abbreviations

CAGR	Compound Annual Growth Rate over the period 2016 – 2020f
Avg. Share	Average Share over the period 2016 – 2020f
2016e/2019f	Estimated/Forecasted
Turnover	Turnover is stated in 1 Mio. Euros. Values are always net turnover values (not list-prices), including rebates.

Types of Agreement

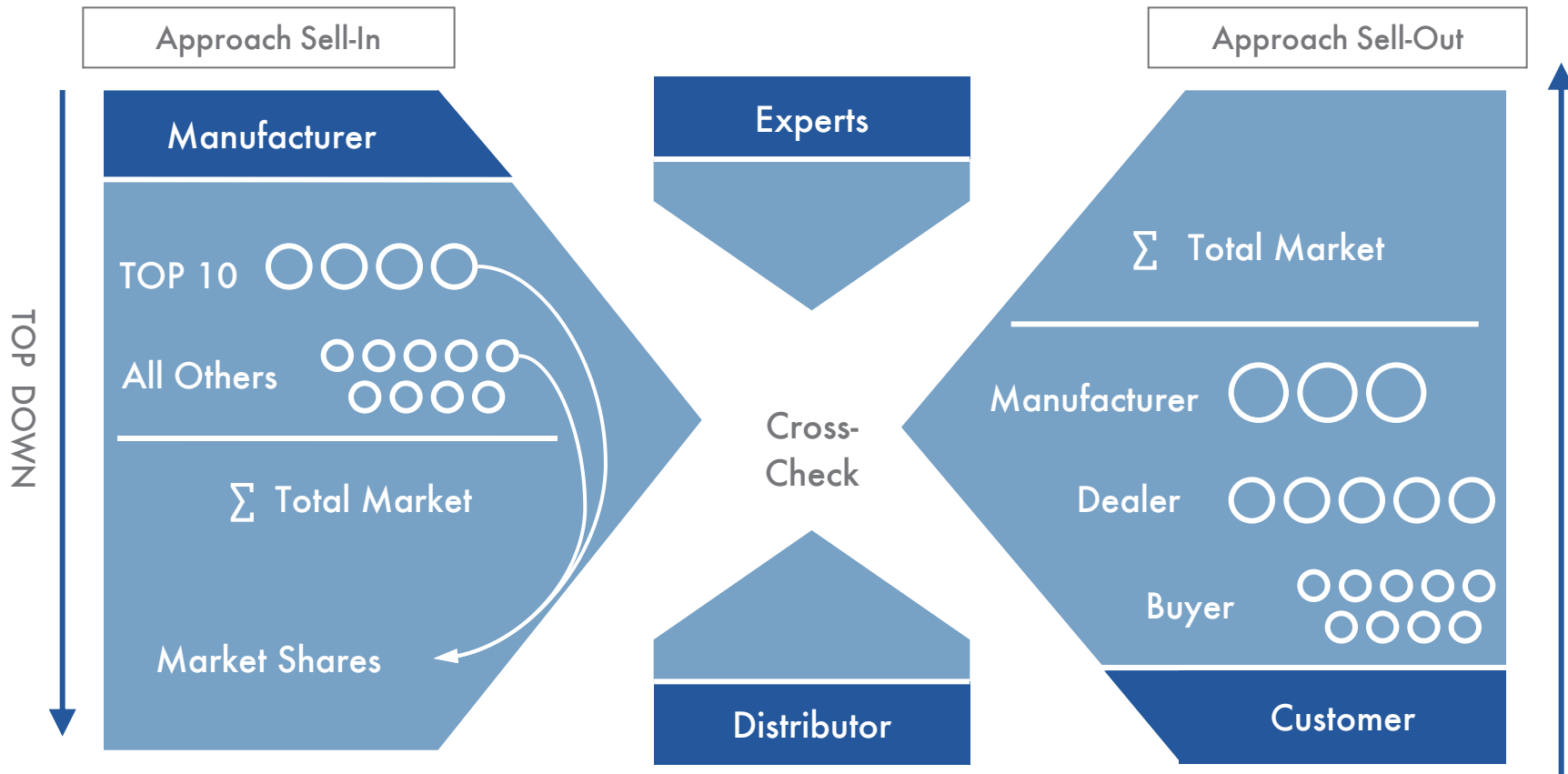| Individual Contract	Contract for one individual Service
Vertical Contract	Contracts for several Services within one service group (i.e. technical)
Horizontal Contract	Contracts for 2 different service types
Complete Contract	Contract for all 3 service types

Contract Types

Internal	Own company
External	Subcontracting

How Do we Cross Check the Data?

Approach Sell-In

Manufacturer

TOP 10 ◯◯◯◯

All Others ◯◯◯◯◯ ◯◯◯◯

∑ Total Market

Market Shares

TOP DOWN

Experts

Cross-Check

Distributor

Approach Sell-Out
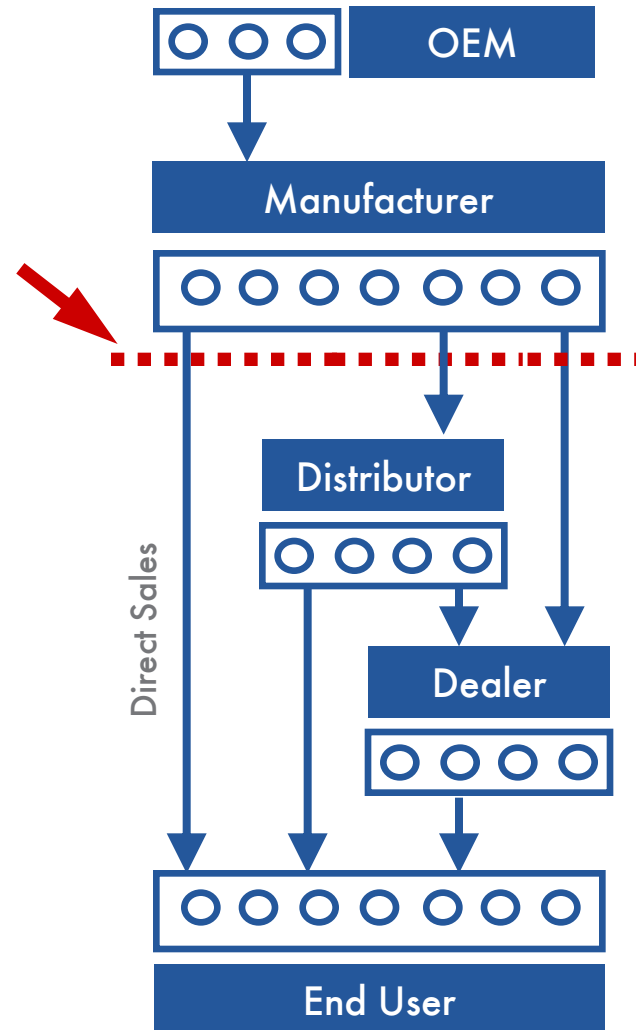
∑ Total Market

Manufacturer ◯◯◯

Dealer ◯◯◯◯◯

Buyer ◯◯◯◯◯ ◯◯◯◯

Customer

What Do We Measure in Our Reports?

Interconnection measures the total sales at street prices without VAT per branch to the first buyer (without OEM)

Sales are segmented by the first distribution partner.

OEM

Manufacturer

Distributor

Direct Sales

Dealer

End User

The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

Interviews with distributors and specialised dealers act as a cross-check of the data. In addition, investigations of listings and average prices are carried out.

How Do We Conduct Our Research?

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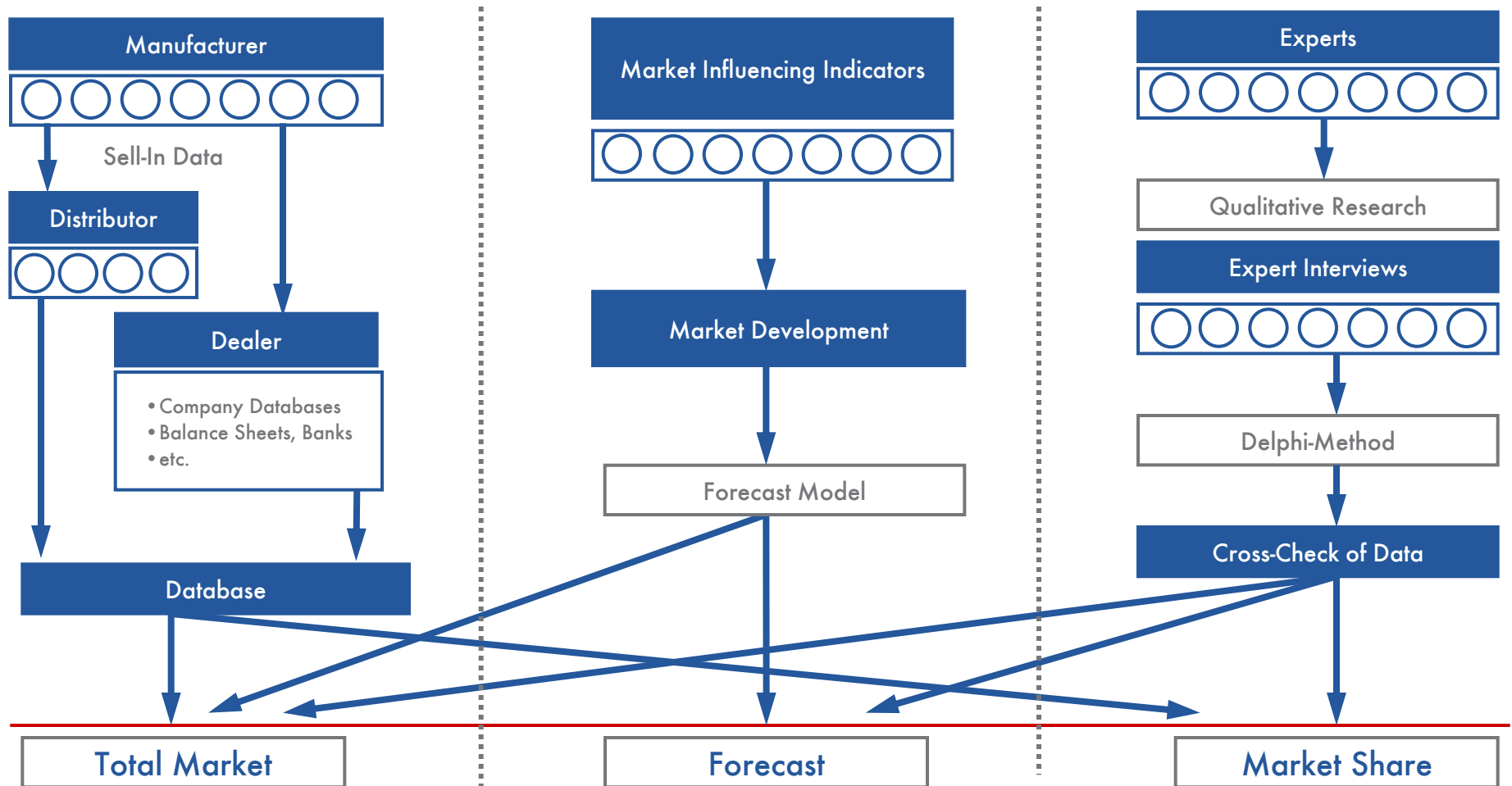
The IC Market Tracking® is modularly built and consists of the following sections:

- 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 product groups. 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.

- By using several analytical tools, we also carry out a **Strategy Analysis:** We show the strategic position through Efficiency-portfolios, BCG-Portfolios, Interconnection Dynamic-Portfolios, etc. Thus you can evaluate the strategic position of the main competitors at a glance.

- 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.
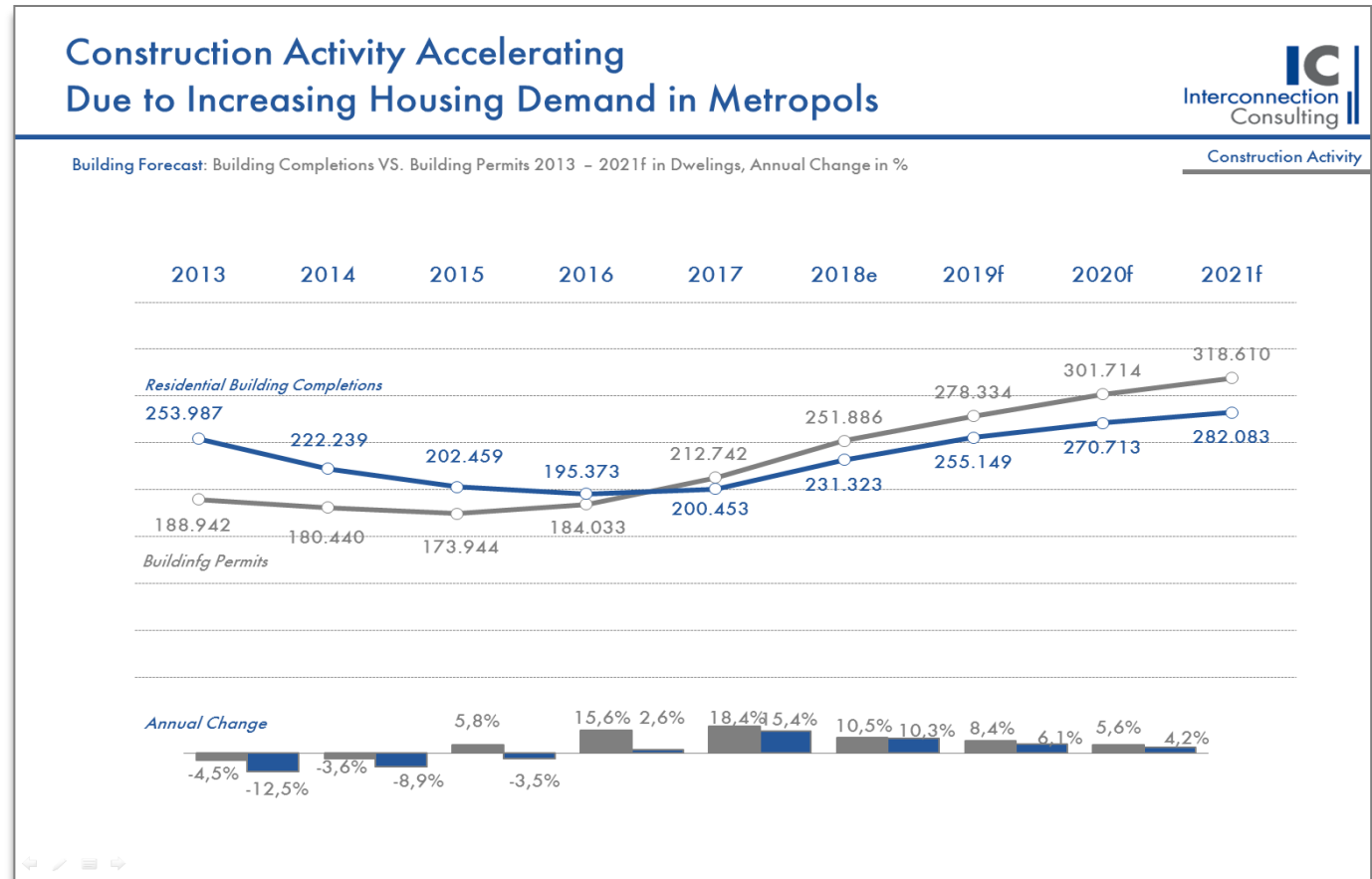
Executive Summary at the Beginning of the Report

- ■ The executive summary comprises all relevant information of the report in precise manner. Forecast and

- ■ competition situation is highlighted

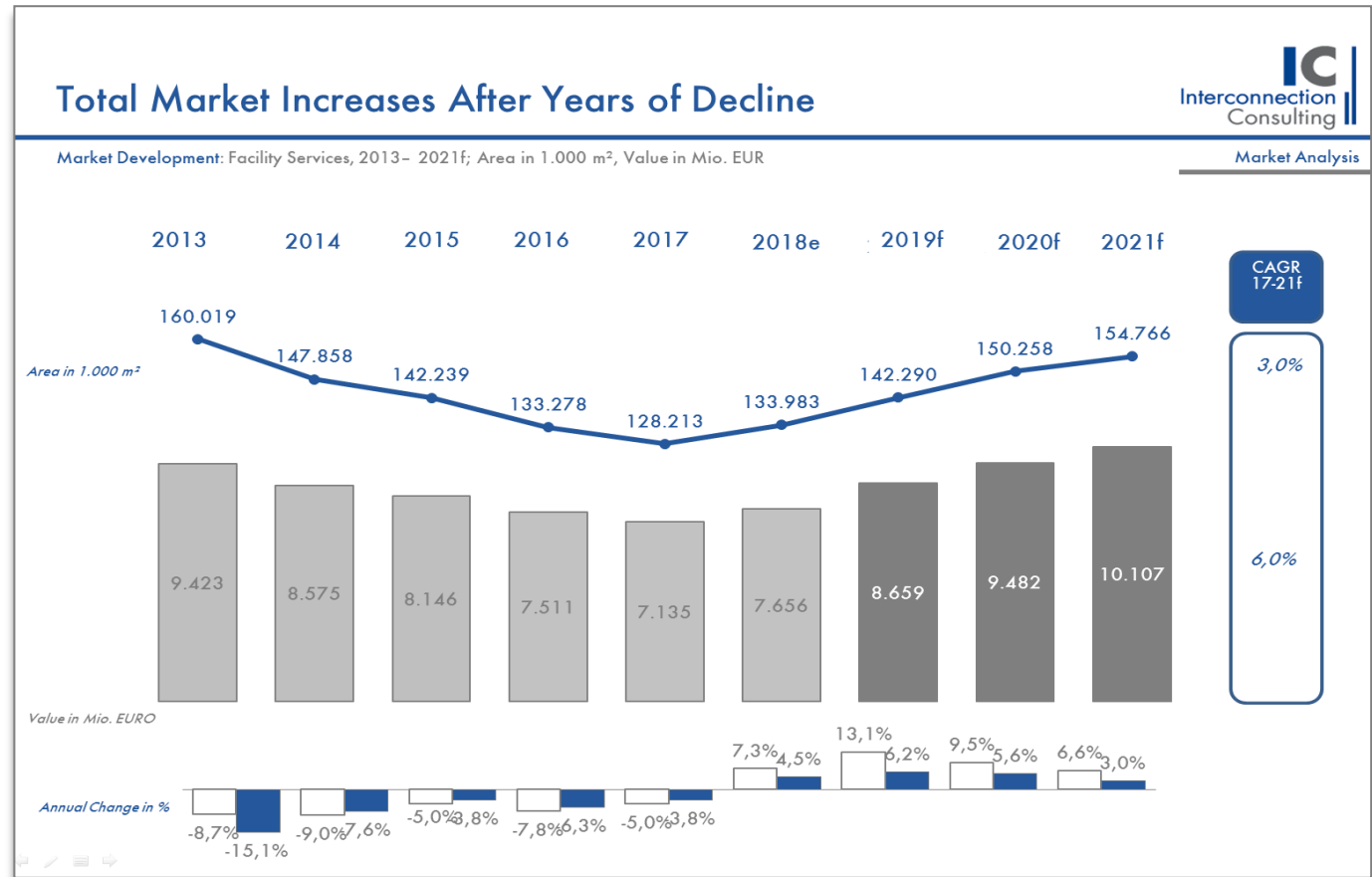- ■ *This chart shows dummy figures.*
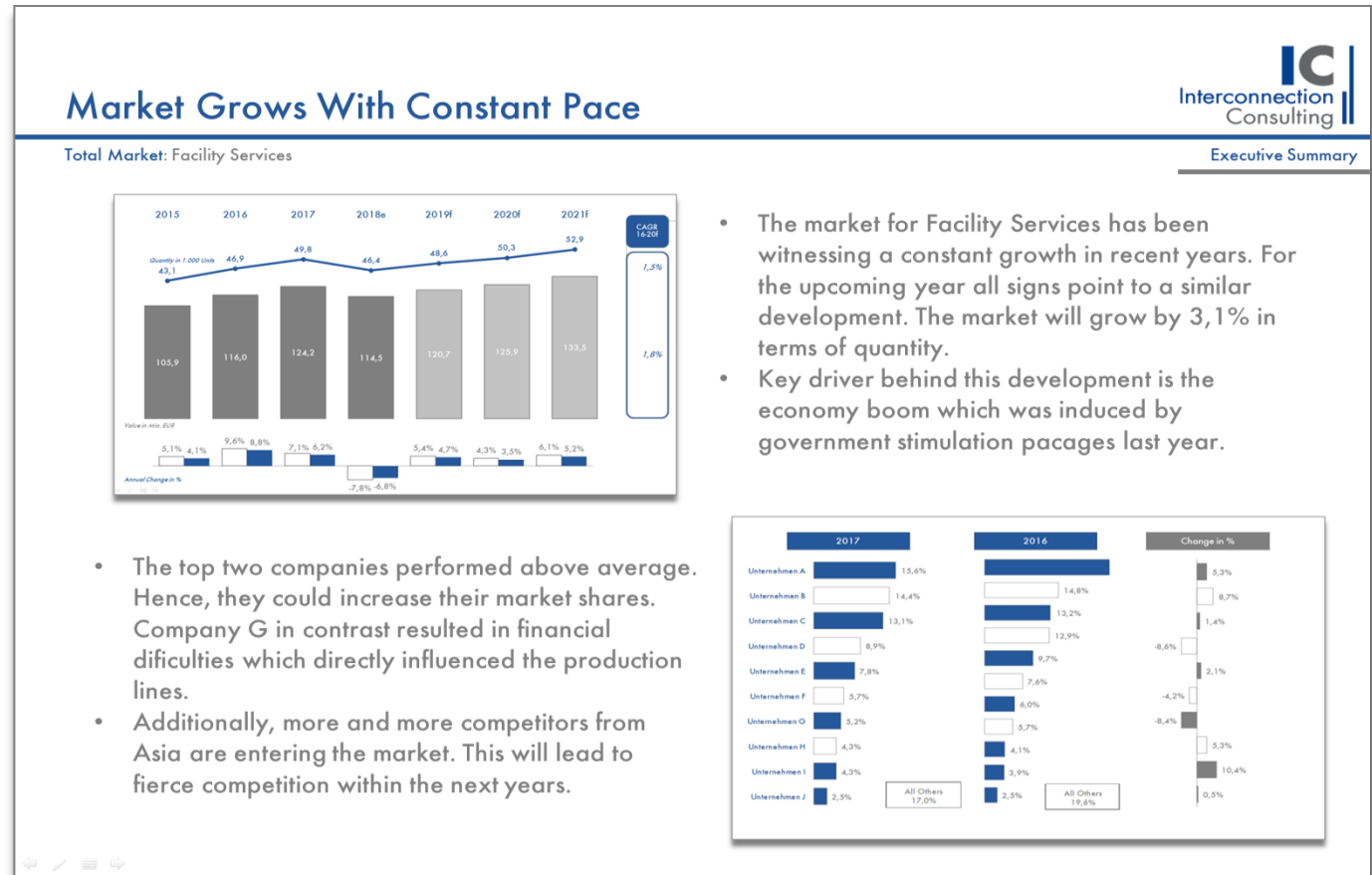
Market Environment Data of Our Forecasting Model

- The data for the market environment consists of main factors such as general economy data, demography, income statistics, construction environment and sentiment indicators.

- *This chart shows sample figures.*

Construction Activity Accelerating
Due to Increasing Housing Demand in Metropols

Building Forecast: Building Completions VS. Building Permits 2013 – 2021f in Dwelings, Annual Change in %
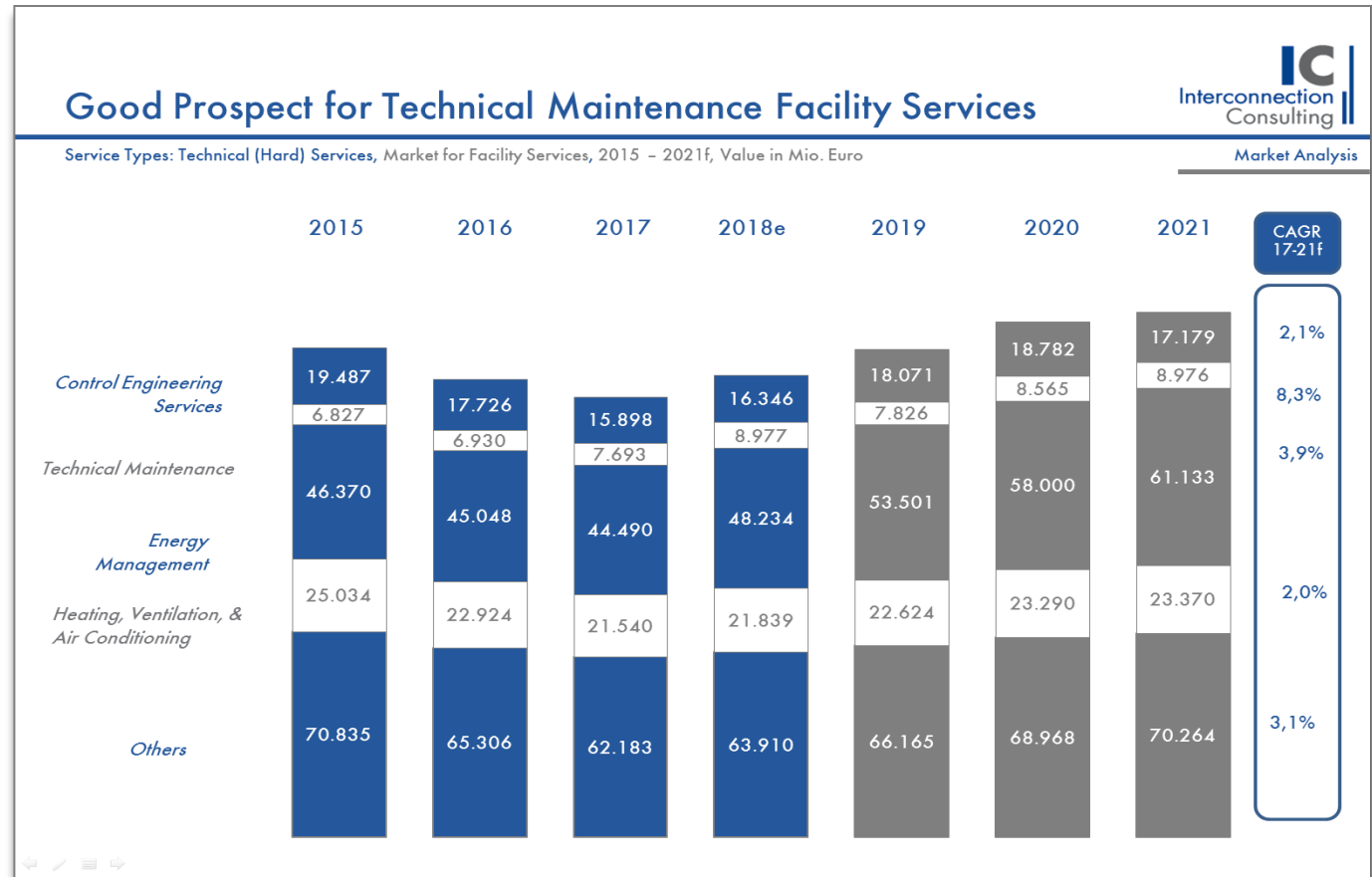
Construction Activity
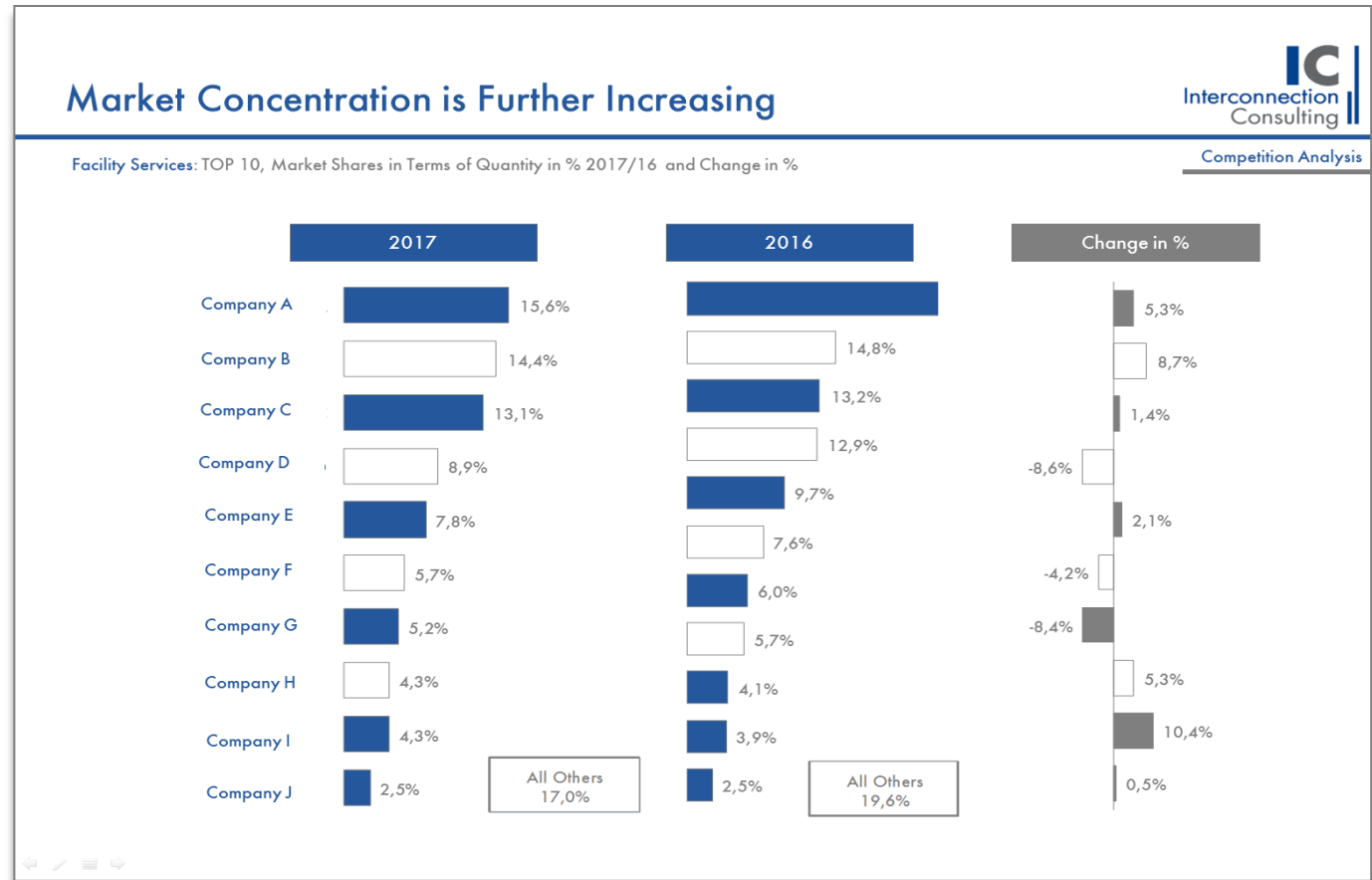
Total Market Development and Forecast

- 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.*

Total Market Increases After Years of Decline

Market Development: Facility Services, 2013– 2021f; Area in 1.000 m², Value in Mio. EUR

Market Analysis

	2013	2014	2015	2016	2017	2018e	2019f	2020f	2021f

Area in 1.000 m²

160.019 · 147.858 · 142.239 · 133.278 · 128.213 · 133.983 · 142.290 · 150.258 · 154.766

Value in Mio. EURO

9.423 · 8.575 · 8.146 · 7.511 · 7.135 · 7.656 · 8.659 · 9.482 · 10.107

CAGR 17-21f

3,0%

6,0%

Annual Change in %

-8,7% · -15,1% · -9,0% · 7,6% · -5,0% · 3,8% · -7,8% · 6,3% · -5,0% · 3,8% · 7,3% · 4,5% · 13,1% · 6,2% · 9,5% · 5,6% · 6,6% · 3,0%

Product Group Development

- Overview of the Product Group Segmentation, Distribution Channels as well as a Forecast for the upcoming three years about their development.

- *This chart shows dummy figures.*

Good Prospect for Technical Maintenance Facility Services

Service Types: Technical (Hard) Services, Market for Facility Services, 2015 – 2021f, Value in Mio. Euro

Market Analysis

	2015	2016	2017	2018e	2019	2020	2021	CAGR 17-21f
Control Engineering Services	19.487	17.726	15.898	16.346	18.071	18.782	17.179	2,1%
	6.827	6.930	7.693	8.977	7.826	8.565	8.976	8,3%
Technical Maintenance	46.370	45.048	44.490	48.234	53.501	58.000	61.133	3,9%
Energy Management								
Heating, Ventilation, & Air Conditioning	25.034	22.924	21.540	21.839	22.624	23.290	23.370	2,0%
Others	70.835	65.306	62.183	63.910	66.165	68.968	70.264	3,1%

Competition Analysis and Market Shares

■ Detailed description of the most important Companies in the examined market by reference to market shares, changes, BCG-Portfolios, etc.

■ *This chart shows dummy figures.*

Market Concentration is Further Increasing

Facility Services: TOP 10, Market Shares in Terms of Quantity in % 2017/16 and Change in %

Competition Analysis

	2017	2016	Change in %
Company A	15,6%		5,3%
Company B	14,4%	14,8%	8,7%
Company C	13,1%	13,2%	1,4%
Company D	8,9%	12,9%	-8,6%
Company E	7,8%	9,7%	2,1%
Company F	5,7%	7,6%	-4,2%
Company G	5,2%	6,0%	-8,4%
Company H	4,3%	5,7%	5,3%
Company I	4,3%	4,1%	10,4%
Company J	2,5%	3,9%	0,5%
	All Others 17,0%	2,5% All Others 19,6%	

Pivot Table

- 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

Pricing

	Single Issue	IC Subscription*	Scale of Discounts
Single Region Cat. A	€ 3.500,-		
Single Region Cat. B	€ 3.950,-	IC SUBSCRIPTION 20 % PRICE ADVANTAGE	€ 5.000 -5%
All 4 Countries**	€ 11.999,-		€ 10.000 -15%

Available Countries	Czech Republic	Slovakia	Other Regions on Demand
	Hungary	Poland	

* **IC Subscription**: 20% 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

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( ) Subscription*   ( ) Single Issue

As a subscription customer, you will receive the chosen report automatically at a reduced price from now on as soon as the new edition of the report is published. Additionally you have access to the following benefits:

- **Price advantage** IC Standard Subscription (annual receipt of an IC study or IC study package): **20% price advantage** compared to single issue taking into account the **scale of discount**

- **Annually updated reports** on fixed dates

- One time a year **free web conference** with the Analyst of the report (presentation of key results, background information, answering of questions)

- **Info-Hotline**: answering of questions with regards to the report and on methodological issues relating to market research

- **Flexible subscription packages**: 2-year intervals, alternating countries, product change, etc., if possible. Conditions on request

- **Easy termination**: After 2 issues each subscription can be terminated easily

Interconnection Delivers Data for Company Decisions

- Interconnection is one of the leading institutes for market data.

- Our studies support the leading companies in defining targets and marketing strategies, including competition monitoring and control of marketing actions.

- Interconnection draws its Know-how from over 100 international market studies per year and a number of Ad-hoc studies in several industries.

- Next to market data we offer for the construction branch Ad-hoc studies in the field of distribution analyses, pricing, market entry strategies, customer satisfaction, image analyses etc.

- Our Consultant supports companies also when it comes to translating data into actions, i.e. the development of marketing strategies.

Our Market-Intelligence Tools

Market Analysis

Market Volume

Market Shares & Entry

Competition Analysis

Distribution Analysis

Channel Map

Distribution Matrix

Margins

Customer Insight

Focus Groups

Buying Motives

Customer Benefits

Market Forecasts

Indicator Models

Life Cycle Models

Econometric Analysis

Brand Analysis

Brand Scorecards

Brand - Triangle

Brand Affinity

Customer Satisfaction

Importance/Satisfaction Portfolios

Customer Loyalty

Customer Typology

Price Research

Price-Sales-Function

Price-Simulation-Tool

Optimal Pricing

Webverstärker

E Commerce Insights

Search Engine Marketing

Web Channel Analysis

"IC is a permanent partner of ours and provides helpful data for decisions."

Herr Bernd Blümmers

General Manager, Saint-Gobain Solar Systems Central Europe

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

Interconnection Consulting

Dostojevsky Rad 11, SK- 811 09 Bratislava

Jan Hudak– Market Analyst

Tel: :+43 1 375 00 12

Fax: +43 1 5854623 -30

hudak@interconnectionconsulting.com

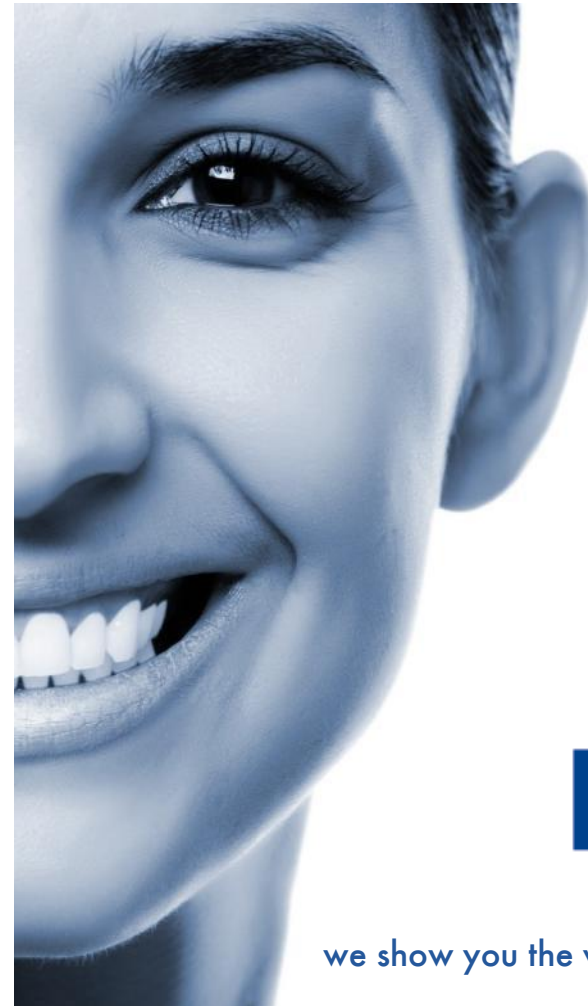Andreas Erdpresser– Managing Director

Tel: +421 2207 48248

Fax: +43 1 5854623 -30

erdpresser@interconnectionconsulting.com

Interconnection Consulting   I   Vienna • Oberstdorf •
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we show you the way

Factsheet: Facility Services in Europe 2018

Interconnection Consulting

Included in the Report

- interactive PDF, Pivot Tables
- Pages (approx.) 100/ per Country
- Optional: Hard Cover: 150 €

Price

- Single Region Cat. A: 3.500 €
- Single Region Cat. B: 3.950 €
- All Regions: 11.920 €

Detailed Information about special offers, scale of discount as well as subscription prices are presented within the order form or the interactive price calculator.

Options of ordering – Fax:+43 1 5854623 30

- Click „Buy Now" on the website and make your order with the interactive price calculator.
- Print out your order form (at the end of the "Full Details" document and fill in your data.

Content of the Market Report

Structure of the Study	Market Structure	Methodology

Structure of the Study

Language of the report

English, German on Request

Introduction, Market structure and Executive Summary

Definition and demarcation of product groups, and as well an executive summary of the outcome.

Market drivers

Summary of the most important economic influence factors on the market.

Total Market Analysis

Total market development and forecasts for all market segments in quantity and value by regions, product groups, business segments, customer segments, distribution channels and opening types.

Competitive Analysis

Market development by value for each region and segment. Market shares of the top manufacturers for each region and for each application for the last two years

Market Structure

Countries

Czech Republic , Hungary, Poland, Slovakia,

Service Types & Sub-Service Types

Technical FM - Technical Maintenance, Control Engineering Services, Energy Management, Heating, Ventilation, & Air Conditioning, Others

Infrastructural (Soft) FM- Cleaning/Janitorial Services, Security Services, Catering Services, Reception / Porter Services, Landscape Services, Others

Entrepreneurial FM- Accounting & Controlling, Property Management, Space Planning, Purchasing, Others

Customer Segments

Energy and Resources, Food & Beverage, Industry & Manufacturing, Pharmaceuticals, Retail & Wholesale,

Transportation & Infrastructure, Hotels, Leisure & Entertainment, Business services & IT, Public administration, Health Care, Other

Methodology

Methodology and Data Sources

The market and competitive analysis is conducted through interviewing the most important manufacturers in the respective industry. All data are cross-checked for plausibility and evaluated by means of additional sources of information.

The market models and forecasts are based on economic indicator models, which are developed individually for each market. The influencing factors are analyzed by means of multivariate regression analysis and updated each year.

The economic indicators and environmental data are a result of secondary research of prestigious statistical institutes and are supplemented by internal market analyses.