

FOU – som forskningen ser på FM udviklingen - Fremtidsvisioner for FM

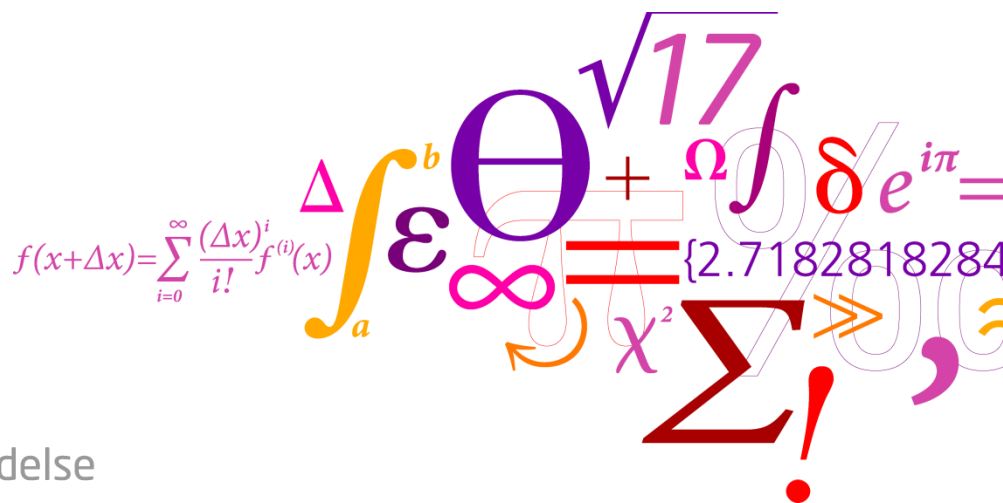


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DTU Management

Institut for Planlægning, Innovation og Ledelse

The perfect FM organisation in 5 years time!

- DFM's 20 years anniversary conference January 2011
 - 16 work groups
 - 48 statements
- Relationships (1/3)
 - FM and top management (7)
 - FM and core business (7)
 - FM and other staff functions (3)
- Development (2/3)
 - The organisation (16)
 - Competences and tasks (8)
 - Mindset (7)



Nordic workshops

- Purpose
 - EuroFM’s FM Market Data project
 - CFM’s Nordic FM Futures project
- Workshops in each of the Nordic countries
 - About FM Market and FM Futures in Denmark, Norway, Sweden and Finland, October 2010 – May 2011
 - Joint Nordic workshop during CFM’s Nordic Conference, August 2011

The first official step to collect and share European facility management market data



The Nordic FM market in 2004

(CapGemini Norway, 2005)

Country	Building area (excl. housing)	Potential FM market (excl. housing)
Denmark	125 million m ²	€ 8,3 billion
Norway	115 million m ²	€ 8,9 billion
Sweden	235 million m ²	€ 23,4 billion
Finland	175 million m ²	€ 11,7 billion
Iceland	10 million m ²	€ 0,7 billion
Total	385 million m ²	€ 52,9 billion

Degree of outsourcing: 25% for all Nordic countries

Increase: 8% pr. year

Market maturity: Sweden > Finland > Denmark > Norway > Iceland

The market for FM in Europe (Teichman, 2009)

Share of GDP in UK, Germany, France, Italy and Spain

- Potential: 4,92%
- Actual market: 2,48%

Market type	Degree of outsourcing	Growth rate
Pioneer markets	56,3 %	6,0 %
Developed markets	43,6 %	8,0 %
Emerging markets	32,5 %	12,3 %
Pre-emerging markets	17,5 %	21,5%

Nordic countries

- Developed market: Denmark
- Emerging market: Norway, Sweden, Finland and Iceland

The Nordic FM market in 2008

(Teichman, 2009)

Billion Euro	FM market volume in 2008					Sum
	Denmark	Norway	Finland	Sweden	Iceland	
GDP in 2005	218,5	249,5	163,1	302,0	13,4	946,5
Total	10,8	12,3	8,0	14,9	0,7	46,6
Actual	5,1	4,5	2,9	5,4	0,2	18,1
Degree of outsourcing	47%	36%	37%	36%	36%	39%

Taxonomy of standardised facility products

(prEN15221-4)

Standardised facility products	Proposal for Danish terms
Space & Infrastructure	Ejendomsdrift
•Space	•Bygninger og lokaler
•Outdoors	•Terræn
•Cleaning	•Renhold
•Workplace	•Arbejdsplads
•Industry sector specific	•Branchespecifik
People & Organisation	Services
•Health, safety and security	•Sundhed, sikkerhed og sikring
•Hospitality	• <i>Catering</i>
	• <i>Reception, kontaktcenter og mødelokaler</i>
•ICT	•IKT
•Logistics	•Logistik
•Business support	•Virksomhedssupport
•Organisation specific	•Organisationsspecifik

CFM's study of the Danish FM market i 2008

- Based on telephone interviews
 - Provider survey, June 2008: 103
 - Client survey, November 2008: 272
 - Private service: 76
 - Public service: 74
 - Industry: 88
 - Housing associations: 56

- Results compared with CapGemini and Techmann

Billion Euro	CapGemini 2004	Teichmann 2008	CFM 2008
Potential market	8,3	10,8	7,9
Actual market	2,1	5,1	4,9
Outsourcing	25%	47%	62%

Factors that have influenced the amount of total FM activities

Country	2004-2008	2008-2010
General Nordic	<ul style="list-style-type: none"> • Increased globalization • Increased professionalism • Focus on sustainability 	
	<ul style="list-style-type: none"> • Economic growth • Development of knowledge and service society • New providers and services 	<ul style="list-style-type: none"> • Financial crisis • Increased competition and focus on cost reductions • Maturing markets

Factors that have influenced the amount of actual FM activities (outsourced)

Country	Long term	Short term
General Nordic	<ul style="list-style-type: none"> • Economical situation • Politics 	
	<ul style="list-style-type: none"> • Increased globalisation • Increased professionalism • Market maturity 	<ul style="list-style-type: none"> • Competition • Availability of labour force • Availability of competences

Estimated growth rates for the potential and actual FM market in the Nordic countries

Changes in potential market

Period	Denmark	Norway	Finland	Sweden	Average
2008-2009	0.2%	0.6%	-	8.0%	2.9%
2009-2010	0.3%	1.5%	-	10.0%	3.9%

Changes in actual market

Period	Denmark	Norway	Finland	Sweden	Average
2008-2009	-0.7%	0.4%	0.0%	7.5%	1.8%
2009-2010	4.9%	1.6%	5.0%	7.5%	4.8%

Ranking of main markets

Potential market

Period	Denmark	Norway	Finland	Sweden	Average
Industry	3	3	3	3	3.00
Privat service	2	2	2	1	1.75
Public service	1	1	1	2	1.25
Housing associations	4	4	4	4	4.00

Actual market

Period	Denmark	Norway	Finland	Sweden	Average
Industry	3	2	3	3	2.75
Privat service	1	1	1	1	1.00
Public service	2	3	2	2	2.25
Housing associations	4	4	4	4	4.00

Distribution on main activities (Space & Infrastructure vs. People & Organisation)






Potential market

Period	Denmark	Norway	Finland	Sweden	Average
S&I	62%	60%	40%	36%	49.5%
P&O	38%	40%	60%	64%	50.5%

Actual market

Period	Denmark	Norway	Finland	Sweden	Average
S&I	53%	64%	40%	36%	48,3%
P&O	47%	36%	60%	64%	51,7%

The size of the FM market in the Nordic countries in 2010

Billion Euro	FM market volume in 2010					
Country	Denmark 	Norway 	Sweden 	Finland 	Iceland 	Sum
Total FM turnover (in-house + outsourcet)	7,9	9,3	38,8 (14,0-70,0)	10,0	0,7	66,7
Actual outsourcet FM turnover	5,1	2,2	15,0 (4,0-35,0)	3,9	0,3	26,5
Degree of outsourcing	64%	24%	39%	39%	39%	40%

CFM's FM Futures Project

Three sessions during workshops

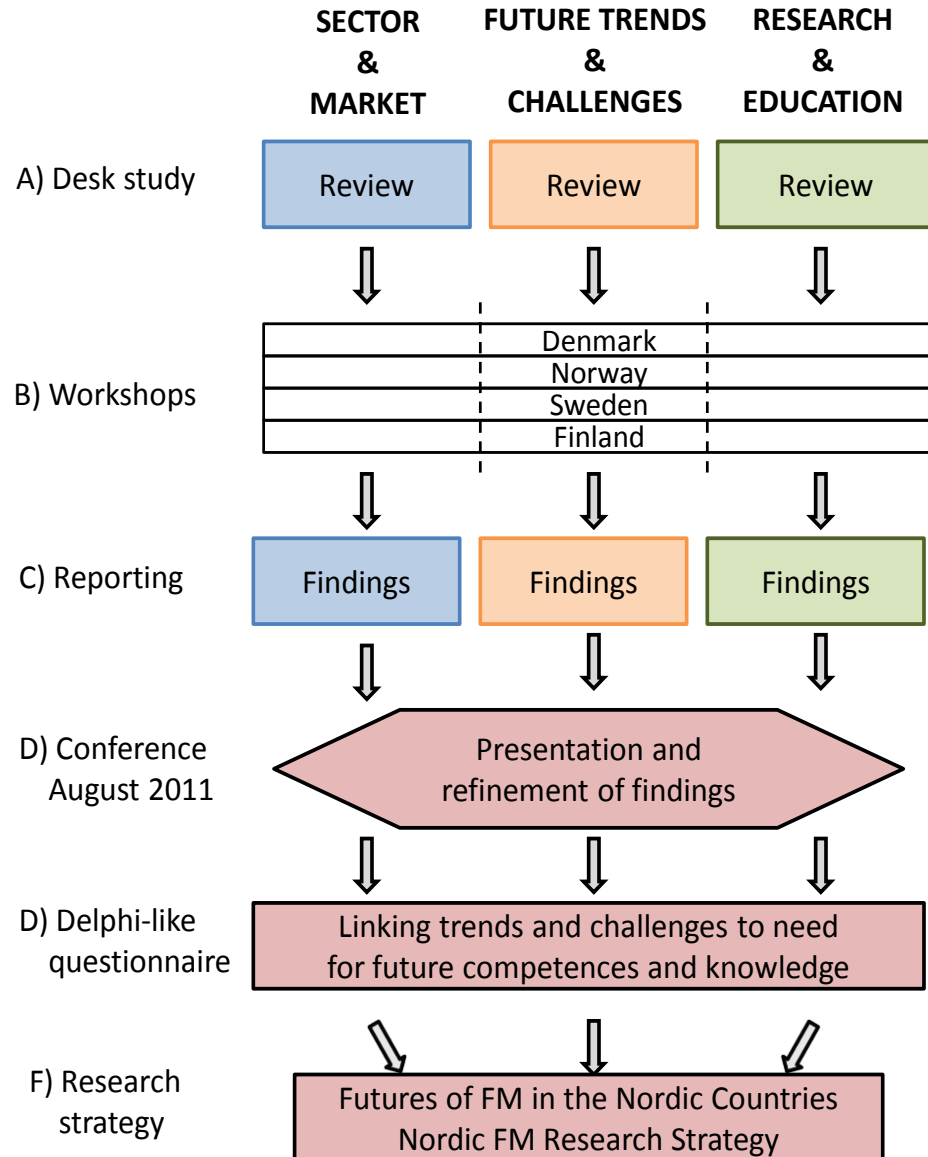
1. Megatrends in the strategic environment of the FM sector in Denmark
2. Current trends and challenges for the FM sector in Denmark
3. Future need for new competences and new knowledge

Facilitators:

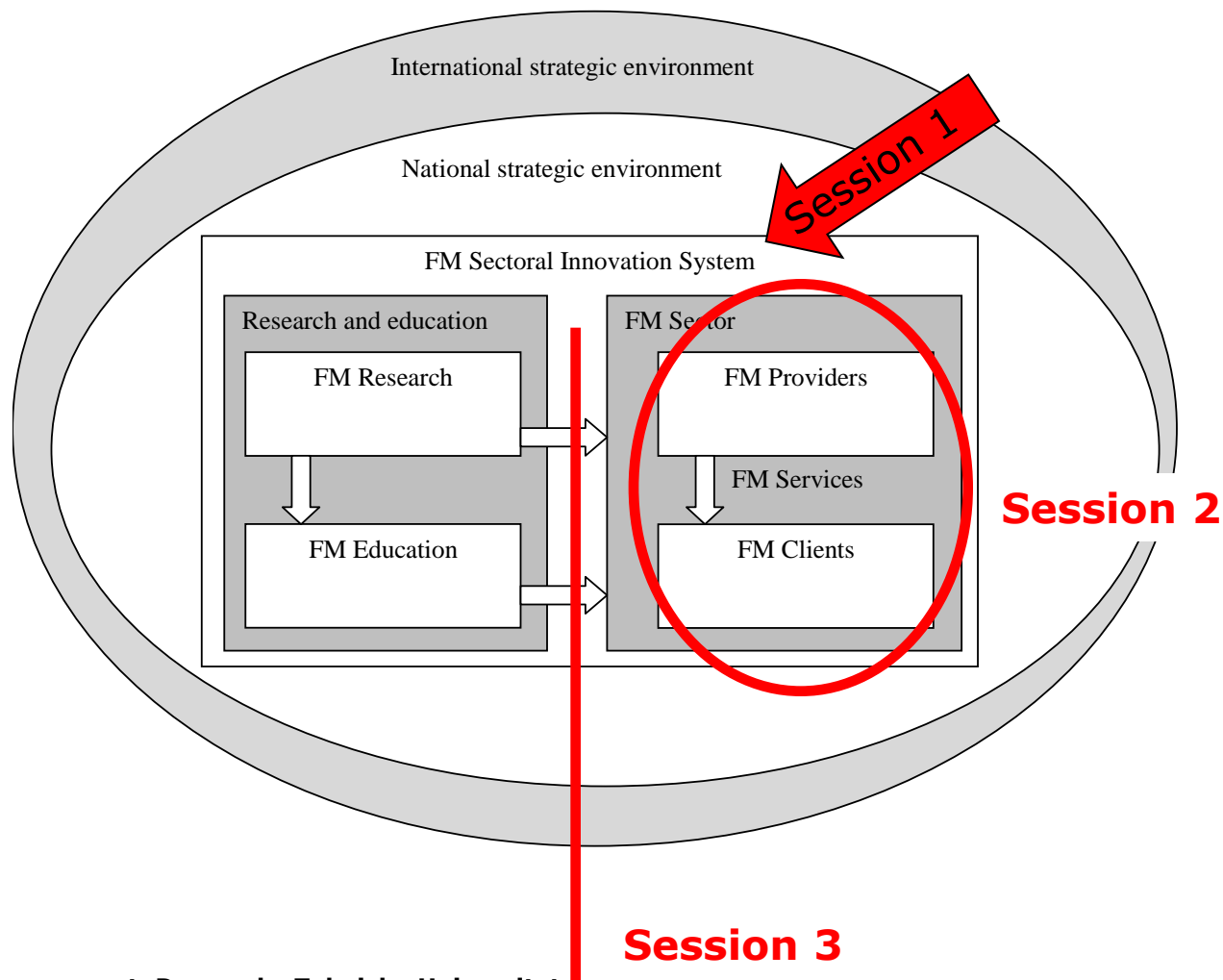
Per Dannemand Andersen and Birgitte Rasmussen

DTU Management Engineering

Innovation Systems and Technological Foresight



An innovation systems model of the FM sector



Megatrends in the strategic environment of the FM sector (10-15 years)

- Increased focus on sustainability

- High ranking and quite certain in all 4 countries, but least in SE



- Globalisation

- High ranking and quite certain in DK and SE, but not in NO and FI



- Demographic change – labour shortage

- High ranking and quite certain in DK and NO, but less in FI and not in SE







- ICT (Information and Communication Technology)

- High ranking and quite certain in NO and SE, but less in DK and not in FI



Most significant current trends and challenges for the FM sector

- DK: 
 - Short term: Sustainability - energy, environment, branding.
 - Long term: Sustainability - energy, environment, branding.
- NO: 
 - Short term: FM is not clearly defined. Spread out a common terminology.
 - Long term: Political development
- SE: 
 - Short: Technology & new way to work – meet needs
 - Long term: How to balance the demand on standardised services and at the same time deliver a tailor-made FM operation in international solutions.
- FI: 
 - Short term: Energy saving in FM (active energy management, incentives for service providers)
 - Long term: Housing FM

Future need for new competences and new knowledge for the FM professionals

- DK:

- Understanding clients needs



- NO:

- KPI (key performance indicators) + New ways of working – consequences for FM



- SE:

- Social ability and personal competences



- FI:

- Urban FM

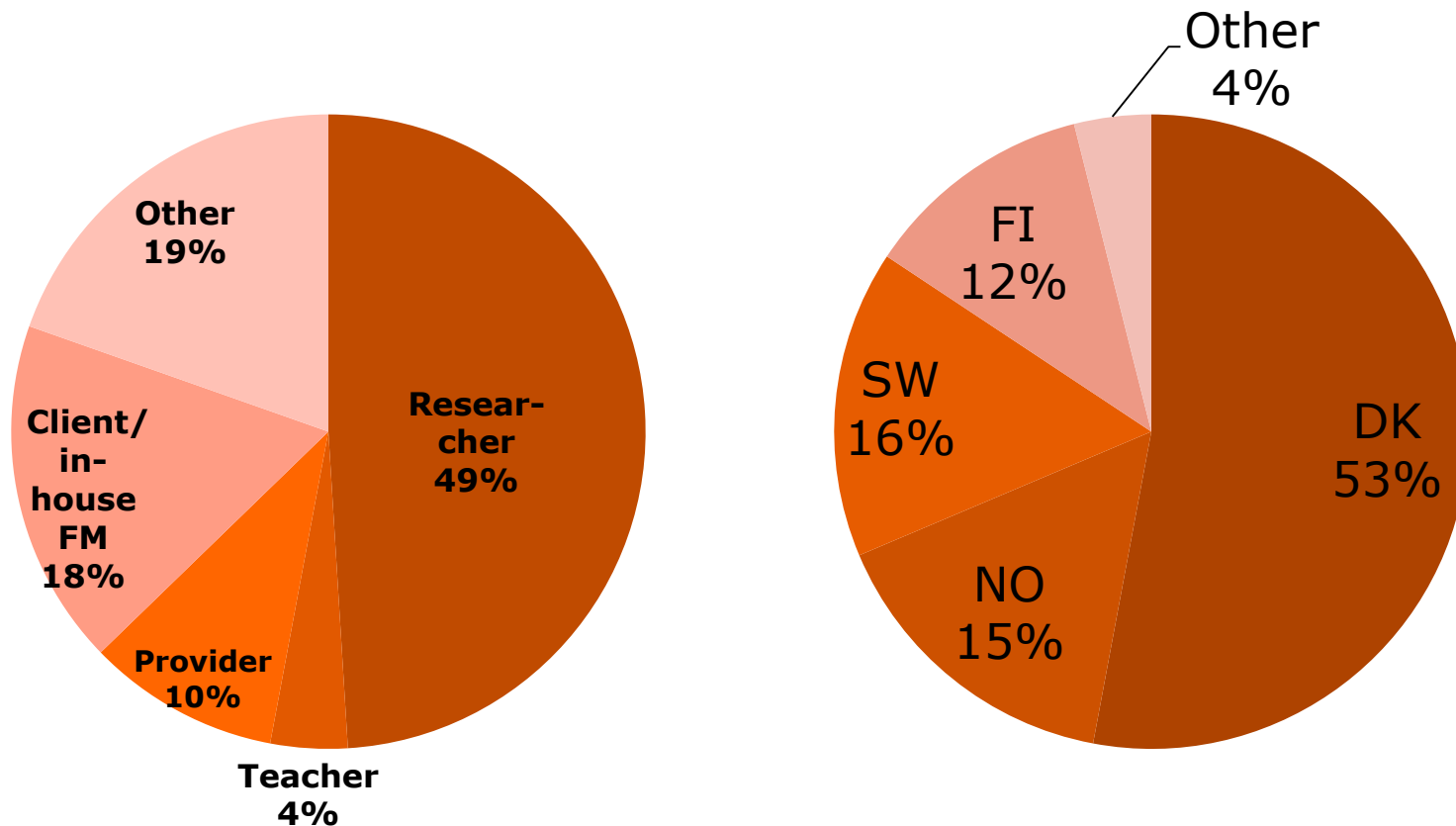


CFM's present research profile

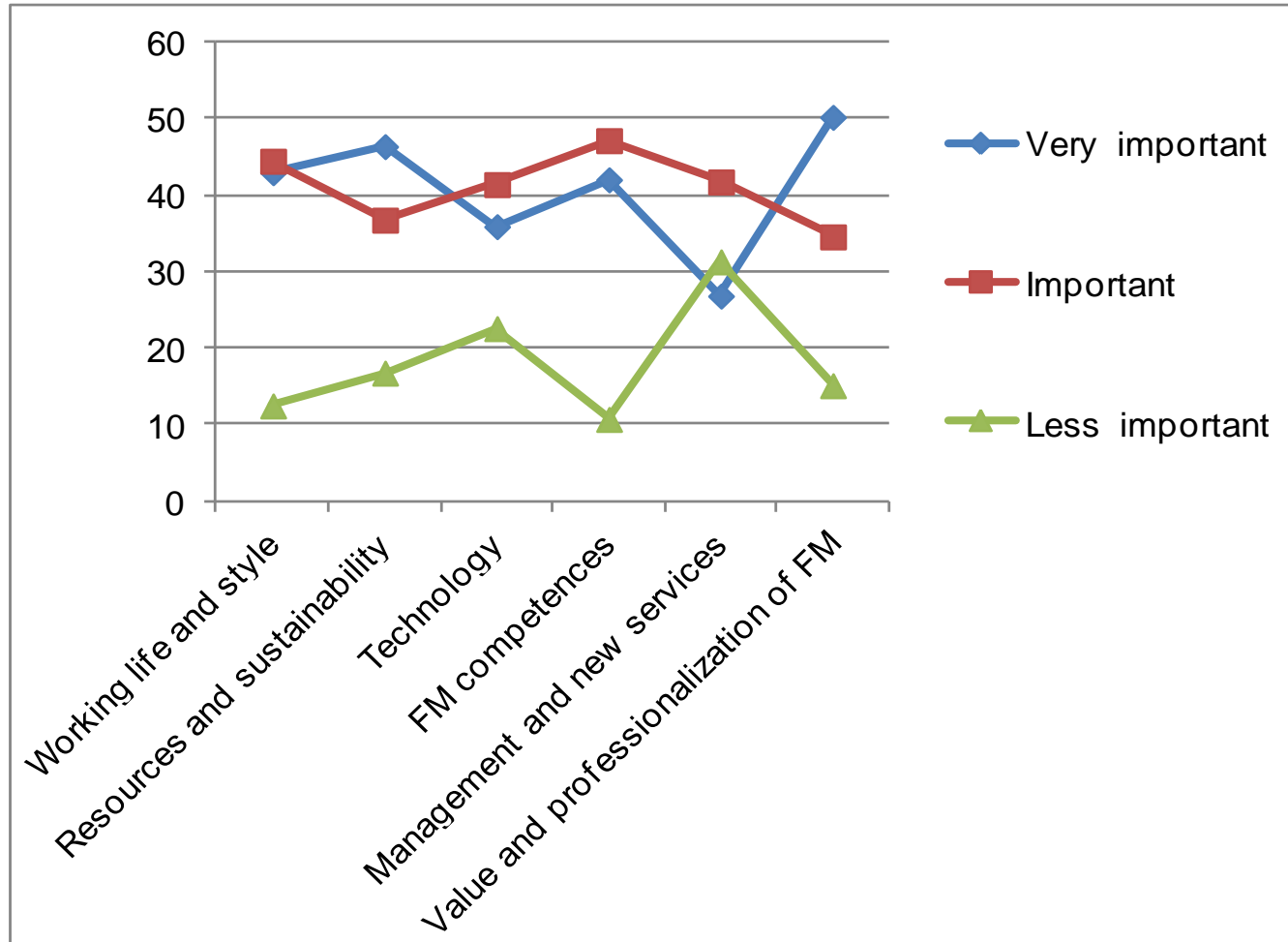


On-line survey autumn – respondents

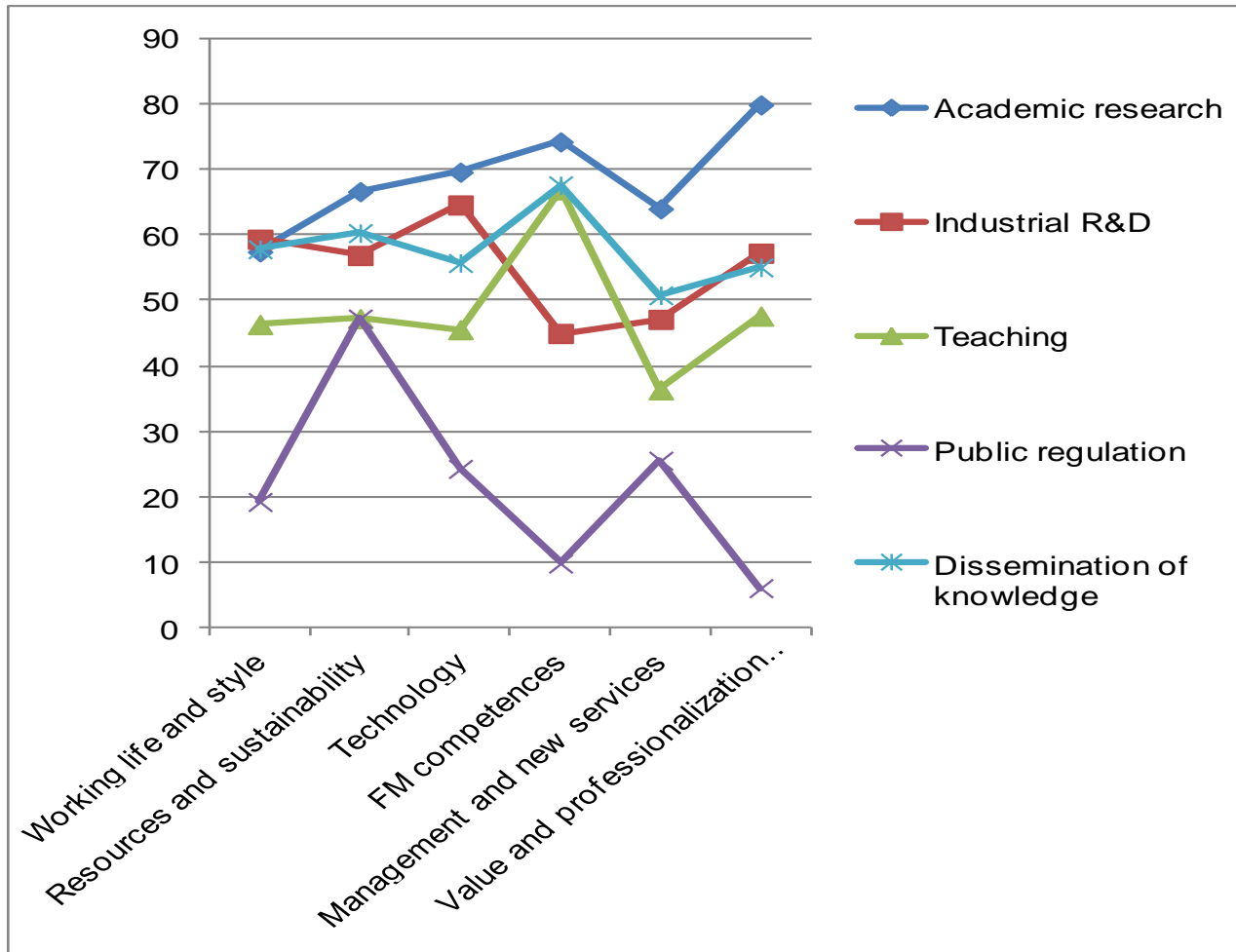
51 replies – 46% response rate



Importance of six themes



Most important activities



Top 10 list out of 40 statements - combination of overall importance and the role of academic research

Rank	Theme	Statement
1	Value and professionalization of FM	39. Introduction of methodologies for FM becoming a critical strategic management tool linking the role of facilities to the organisation's core business strategy
2	Value and professionalization of FM	32. Introduction of a set of principles for measurement and documentation of the added value by FM services
3	Technology	16. Development of cross disciplinary, life-cycle oriented and holistic FM services for building development, delivery and operation
4	Resources and sustainability	8. Sustainability as a fundamental requirement in FM services across most client groups
5	Value and professionalization of FM	33. Introduction of a methodology to highlight and ascertain return of investment for the organisation of the FM costs spent in-house
6	Resources and sustainability	5. Introduction of methodologies for energy saving management in FM services
7	FM competences	23. Development of new strategic skills to identify and manage uncertainties and expectations in FM services
8	FM competences	20. Widespread use of knowledge transfer from scientific communities to FM providers and FM clients related to FM services
9	Value and professionalization of FM	37. Development of a common conceptual FM terminology applied within a professional FM management framework
10	Value and professionalization of FM	34. Introduction of FM services providing strategic value for FM clients with continuously changing functionality, technology and staff/customer demands

Suggestions for a common Nordic FM research agenda

- Two main headlines

- Value and professionalization:

- Introduction of methodologies for FM becoming a critical strategic management tool linking the role of facilities to the organisation's core business strategy
 - A set of principles for measurement and documentation of the added value and return of investments of FM services

- Sustainability in facility management services:

- Sustainability as a fundamental requirement in FM services across most client groups
 - Methodologies for energy saving management in FM services

- Recommendations

- Tight cooperation between researchers and industrial partners
 - Transfer of knowledge between researchers and practitioners

IFMA Forecast 2011 – 10 trends



- Externally-driven trends
 - Sustainability
 - Complex building systems
 - Aging building stock
 - Emergency preparedness and business continuity planning
- Internally-driven trends
 - Quantity and complexity of data
 - Finding top talent
 - Elevate facility management
- Organizationally-driven trends
 - The need for an evolving skill set
 - Efficiency, productivity and profitability
 - Changing work styles

ISS 2020 Vision – 10 megatrends

Factor megatrends

- Economic growth
- Globalization
- Demographic trends
- Sustainability

Knowledge megatrends

- Technological development
- Increased knowledge



Social megatrends

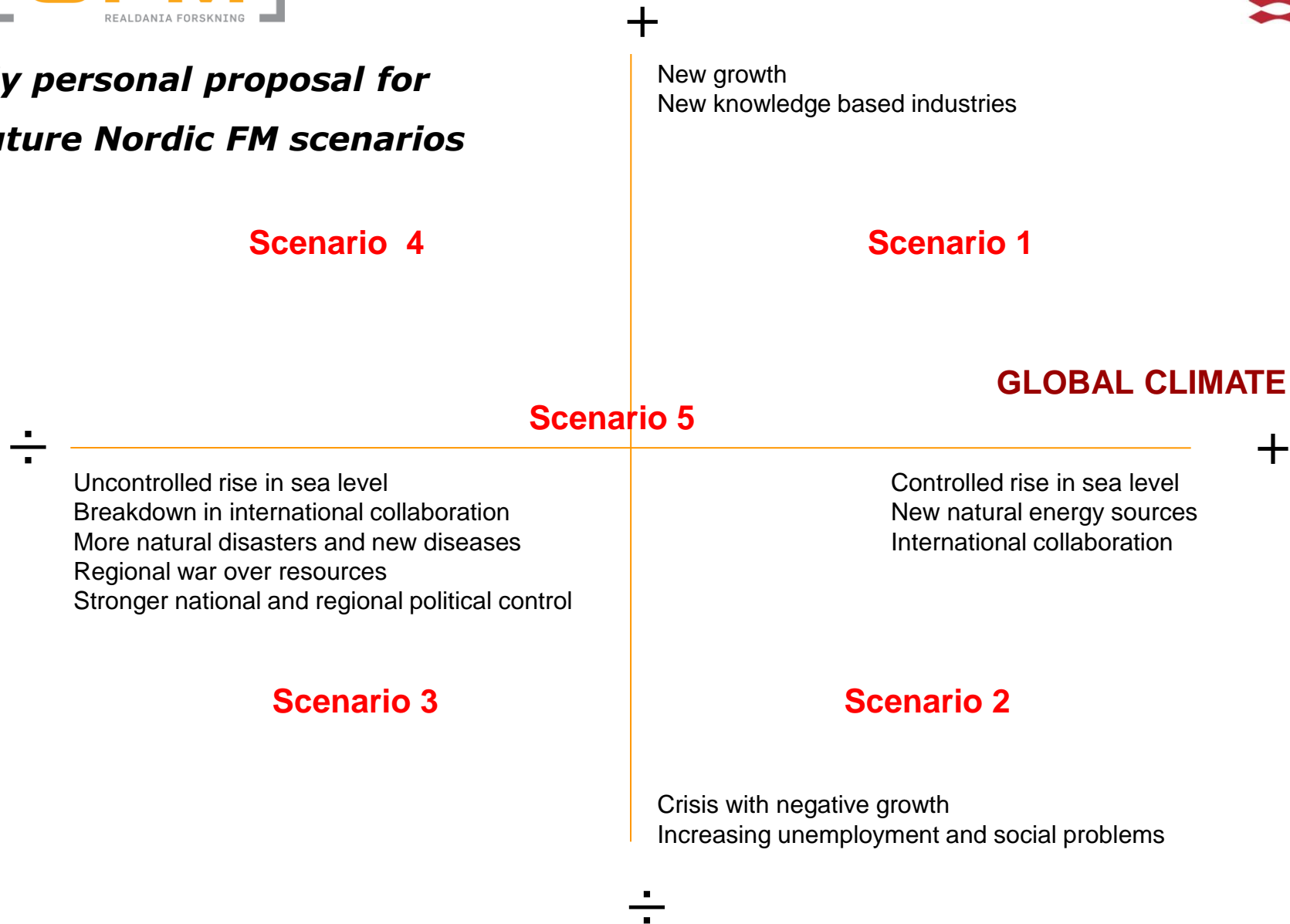
- Individualization
- Commercialization
- Growing focus on health

Trends and tendencies of consequence for the industry

- Natural catastrophes in densely populated urban areas
- New ways of working

Copenhagen Institute for **Futures** Studies
Institutet for **Fremtids**forskning

My personal proposal for future Nordic FM scenarios



Possible scenarios for Nordic FM until year 2025

Scenario 5: The Roundabout

Less increase in globalization
 Focus on CSR and a combination of cost reduction and added value
 Focus on regional development in Europe
 Focus on energy renovation and optimization
 Health, safety, security and environment in focus

Scenario 4: The Winding Road

Less increase in globalization
 Strong focus on CSR
 Focus on national development and renovation due to lack of resources
 Removing parts of cities from low areas
 Reduction in space needs due to increasing land values and construction costs
 Health, safety, security and environment in focus

Scenario 3: The Road on the Edge

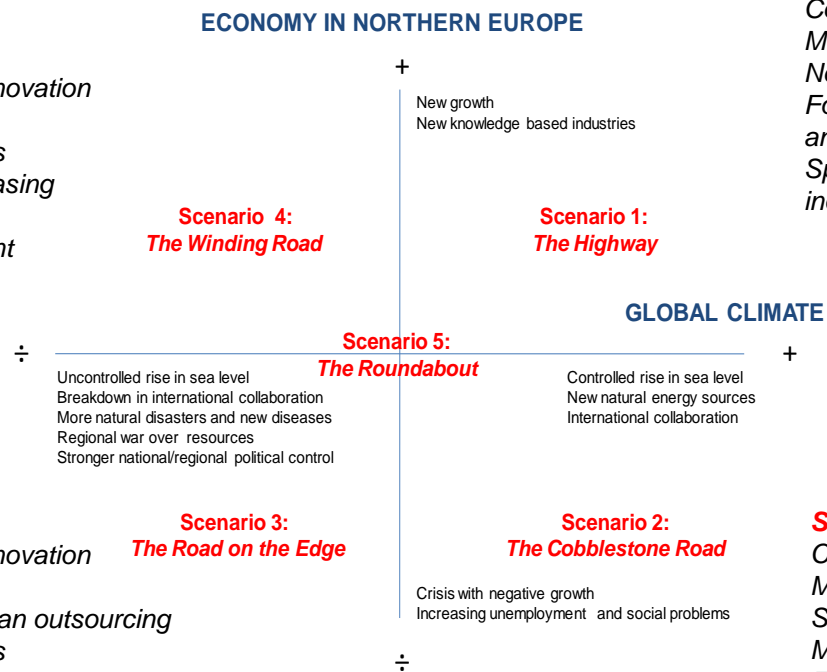
Stop for globalization
 Strong focus on cost reduction
 Focus on national development and renovation due to lack of resources
 Insourcing and nationalization rather than outsourcing
 Removing parts of cities from low areas
 Reduction in space needs due to increasing land values and construction costs
 Health, safety, security and environment in focus

Scenario 1: The Highway

Continued globalization
 More Integrated FM (I-FM) and partnerships
 New knowledge based added value
 Focus on Corporate Social Responsibility (CSR) and sustainable certification
 Specialisation of FM according types of industries/core business

Scenario 2: The Cobblestone Road

Continued globalization
 More I-FM and partnerships
 Strong focus on cost reduction
 More outsourcing and privatisation
 Focus on energy renovation and optimization
 New sustainable business models



This is the end, my friend! (Jim Morrison)

