About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

# 2018 – 2019 FACILITIES MANAGEMENT MARKET ANALYSIS SURVEY: SOUTH AFRICA



#### About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

# CONTENTS

3 - NOTE FROM THE EDITORS

### 5 - ABOUT THE RESEARCH: METHODOLOGY AND RESPONDENTS

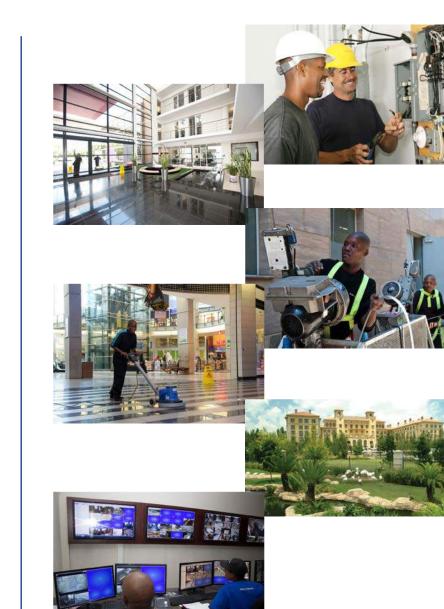
8 - EXECUTIVE SUMMARY

**11 - OVERALL MARKET SHARE FOR FM SERVICES** 

### 33 - FM GROWTH AND SERVICE LINES

- Integrated Facilities Management
- Catering
- Remote Camp Management
- Cleaning Services
- Hygiene Services
- Office Plants
- Pest Control
- Water Systems
- Washrooms

- Golf Estates & Turf Management Landscaping
- Parking Management
- Security Services
- Parking Control Systems & Technical Services
- Security Technical Solutions
- Building Management Systems & Energy Solutions
- Marine Transport Solutions
- 50 VERTICAL INDUSTRY GROWTH
- 63 VERTICAL INDUSTRY BUSINESS REQUIREMENTS
- 77 FM SERVICE PROVIDER REQUIREMENTS
- 98 TENDERS AND PROPOSALS
- 102 FM BUDGET RANGES & CYCLES
- 106 EPILOGUE
- **107 GLOSSARY/DEFINITIONS**





About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

# NOTE FROM THE EDITORS

Welcome to the *2018-2019 Facilities Management Market Analysis Survey: South Africa* commissioned by the Servest Group and produced independently by Knowledge Executive.

This survey provides in-depth analyses of the facilities management (FM) sector in South Africa and forecasts and predicts outsourcing growth, investment priorities, service provider criteria and client satisfaction levels based on quantification studies with over 200 organisations across 12 vertical industries.

The FM services market in South Africa is a multi faceted, multi talented industry consisting of soft<sup>1</sup> and hard services<sup>2</sup> provided through insourced, outsourced or hybrid delivery models. This report reviews 17 of the top FM service lines and areas.

From the outset Knowledge Executive conducted this report impartially and objectively ensuring that the fieldwork and the research process were conducted with veracity (truthfulness), fidelity (trust), confidentiality and privacy.

The result is this independent report that reflects the forecasts, opinions and predictions of South African enterprise and medium sized organisations, juxtaposed with desktop research and qualitative commentaries from forward-thinking FM service providers in the country.

Thank you to all 213 respondents who took the time to complete this survey and who shared their valuable data, statistics, projections and perspectives. Without FM experts and leaders like you this research report would not have been possible to create and publish.

We trust that this report will enable you, the reader, to better understand the market size and forecasted growth of the FM services industry in South Africa including key trends, strategic recommendations and client engagement requirements in the 12 months ahead.

Happy (and insightful) reading!



Steve Wallbanks Chief Executive Officer Servest Group www.servest.co.za



Mark Angus CEO & Managing Editor Knowledge Executive www.knowledge-executive.com





#### About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

## NOTE FROM THE EDITORS CONTINUED

#### <sup>1</sup>FM soft services include:

- Cleaning Services
- Hygiene Services
- Landscaping & Turf
- Office Plants
- Parking Management
- Pest Control
- Remote Camp Management
- Security

Washrooms

#### About Servest

Servest is a multidisciplinary business positioned to coordinate all of facilities related services, including operational and infrastructure support. Servest aims to ensure the integration of people, systems, places, processes, and technology.

Services

Water Systems

<sup>2</sup>FM hard services include:

**Air-Conditioning Systems** 

**Energy Management** 

**Building Information Technology** 

**Building Maintenance and Repair** 

Parking Control Systems and Technical

Security Technical Solutions & Systems

#### About Knowledge Executive

Knowledge Executive empowers and enables global Knowledge Leaders. We co-create and publish business, trade and investment research, market intelligence and insights for executives of today's Experience Economy. This includes commissioned and syndicated specialist research reports, qualitative and quantitative surveys covering facilities management (FM), business process outsourcing (BPO) and customer experience (CX).

Research Commissioned and First Published in 2018 By Knowledge Executive

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Knowledge Executive and Servest

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About the research

#### Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

# ABOUT THE SURVEY: METHODOLOGY & RESPONDENTS

Knowledge Executive was commissioned to conduct the research by the Servest Group to provide an updated and impartial view of the Facilities Management (FM) services marketplace in South Africa. Facilities, operations and estate managers and directors were invited to participate in the survey through telephonic interviews that were conducted in English over an eight-week period between May 2018 and June 2018. The respondents were assured that their personal details, and the information they shared within the questionnaires, would be kept confidential.

### Primary Quantitative Research

In total, 213 FM end-users/clients/organisations were interviewed for the survey using the 80/20 principle whereby 15 - 20 interviews were completed with the top/established large and medium sized enterprises in each respective vertical. These organisations represented 12 vertical markets including:

- 1. Banking, Financial Services & Insurance (BFSI)
- 2. Education
- 3. Government (Local)
- 4. Healthcare & Medical
- 5. Hospitality & Leisure
- 6. Industrial & Manufacturing
- 7. Mining
- 8. Professional Services
- 9. Property & Real Estate (including Lifestyle & Residential Estates, Golf Estates, Office Parks)
- 10. Retail & Distribution
- 11. Telecommunications
- 12. Transport & Travel (including Port Operations & Agents, Chartering/shipping)

Job Titles Of Participants

1.16%

3.49%

5.23%

(7.56%)

8.60

Front Office Manager Facilities Supervisor Estate Manager Maintenance Manager Director Facilities Administrator Facilities Coordinator Procurement Manager General Manager Operations Manager Facilities Manager

About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

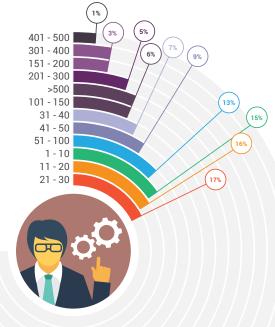
# ABOUT THE SURVEY: METHODOLOGY & RESPONDENTS

#### Supporting Qualitative Research

In addition to the quantitative surveys, qualitative interviews and desktop research was conducted covering over 22 facilities service providers or contractors in South Africa across 17 key service lines including:

- Integrated Facilities Management
- Catering
- Remote Camp Management
- Cleaning Services
- Hygiene Services
- Office Plants
- Pest Control
- Water Systems
- Washrooms
- Golf Estates & Turf Management
  - Landscaping
- Parking Management
- Security Services
- Parking Control Systems & Technical Services
- Security Technical Solutions
- Building Management Systems & Energy Solutions
- Marine Transport Solutions

The analysis of the quantitative data was structured using validated scoring matrices, while the text, graphs, icons and qualitative data were created to support the key findings based on desktop research and interviews with top FM service providers in the country. Approximately how many people in your organisation focus specifically on facilities management (FM)?





About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

# ABOUT THE SURVEY: METHODOLOGY & RESPONDENTS

### Research Objectives

Knowledge Executive facilitated this research with a view to conducting a market analysis survey for Facilities Management (FM) in South Africa.

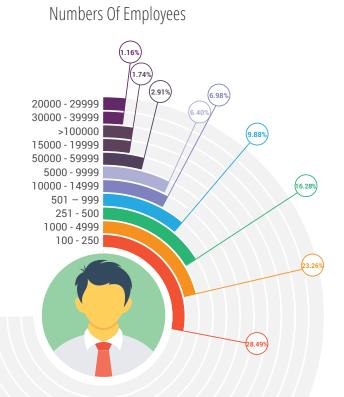
### At the outset, we wanted to ensure that the report covered the following:

- Indication of overall market share for FM services in South Africa.
- Percentage insourced and percentage outsourced.
- End-user growth strategies and investment plans for FM services across 12 vertical/industry sectors.
- Outsourcing growth and service criteria for FM services across 17 core FM service lines (with some categorised together).

### Key Assumptions, Dependencies & Risks

With regards to the key assumptions, dependencies and risks associated with the project, Knowledge Executive identified the following:

- The vertical sectors and service lines are quite broad and cover a number of industries, which required that we achieve an acceptable sampling size in order to provide accurate market sector drill-down statistics.
- The participants or organisations surveyed were difficult to contact and/or commit to the process. We had to facilitate a series of reminder phone calls and communications until we completed the interviews with them.
- Some of the questions asked, and data required, was considered to be too sensitive to disclose by the recipients, though confidentiality was assured.







#### About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

# **EXECUTIVE SUMMARY**

The **2018-2019 Facilities Management Market Analysis Survey: South Africa** confirms that the facilities management sector in South Africa boasts hundreds (if not thousands) of multi-player service providers and contractors with diverse skill sets, expertise and resources offering integrated, bundled and singular FM services.

The size, length and depth of the sector provided challenges when conducting a market share analysis of this kind as service lines such as building management, security, cleaning, and landscaping have many different service providers specialising in core areas, with a handful of organisations offering total or integrated FM services.

### Overall.FM.Market.Share

However, the survey does attempt to validate the market size of the sector while providing an indication of market share across 17 key service lines. The results (which speak for themselves) reflect the multi-faceted scale and scope of the industry with service providers that may be dominant in some service lines giving way to ascendant contractors in other service areas and verticals.

### FM.Growth.and.Service.Lines

The year ahead will witness definitive growth in FM outsourcing, with many respondents to the survey indicating that they would outsource Hygiene services (44%), Cleaning (38%), Catering (28%) and Integrated Facilities Management (26%).

38% of the respondents indicated that they outsource 26 – 50% of their facilities





About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

# **EXECUTIVE SUMMARY**

Respondents to the survey also indicated that they will evolve or grow FM activities such as Parking Control Systems (26%), Security Technical Solutions (29%) Washrooms (26%) and Building Management and Energy Solutions (32%) substantially or moderately over the next 12 months.

### Vertical Industry Growth

Banking, Financial Services and Insurance organisations indicate that they will substantially increase investment into Parking Control Systems by 42% over the next year while the Healthcare and Medical industry will double investment in Cleaning services. The Mining sector will invest more in Washrooms (29%) while Local Government departments will put more focus into Security Technical Solutions (27%). Other high growth verticals include Industrial & Manufacturing and Property & Real Estate that will grow Security services by 25% and 15% respectively, while Retail & Distribution organisations will invest further in Integrated Facilities Management (31%).

### Service Provider Requirements

Overall, FM service providers and contractors should implement cost savings, offer integrated FM services and consistently implement best practices in order to retain the loyalty of their clients.

Respondents to the survey are completely to mostly satisfied with their service providers and contractors with Technical Expertise, B-BBEE, Time Management and Quality of Staff or Expertise receiving the most highest ratings.

The Healthcare and Medical industry will double investment in Cleaning services.





About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

# **EXECUTIVE SUMMARY**

Business and strategic drivers for end-users and clients to outsource their FM services include enabling them to focus on their core business (24%), fostering business growth (22%), cutting costs (20%), enabling quality delivery of FM services (14%) and tapping into better FM expertise provided by outsourced service providers or contractors (8%).

### **Tenders and Proposals**

When it comes to issuing tenders or requests for proposals (RFPs), many end-users and clients do this to benchmark services or pricing between suppliers or to see what new technology and innovations are out there. Some end-users and clients keep the same FM service provider but tender their services just to follow due process.

In most organisations the CEO or Managing Director is the absolute final decision maker when it comes to awarding tenders, followed by the Head of FM Services.

### Conclusion

Truly, the FM sector in South Africa is poised for growth and transformation across several key service lines and vertical industries, while in other areas FM services will remain stagnant or even decline. This trend will result in more mergers and acquisitions, while singular service contractors will branch out into different service lines in an attempt to offer bundled and integrated facilities management services. Clients and end-users will want to implement cost savings while simultaneously deploying best practices, technology and innovations. The year ahead will indeed be one of change and evolution with shifting market demands - and fluctuating market share.

24% of end-users and clients will outsource their FM services in order to focus on their core business.





About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary









### About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

# **OVERALL FM MARKET SIZE**

In 2017, there were **714 422** registered companies assessed by the South African Revenue Services (SARS).

Of these 340 are large enterprises with turnovers of over R200 million+

295 of these organisations have turnovers of R100 million+

61 977 of these companies are considered to be medium sized enterprises with turnovers ranging from R20 million+ to R100 million.

When doing our analysis for this survey, we primarily utilised data from the 2017 SARS Tax Statistics and cross-referenced this with other sources such as StatsSA.



About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

# FM MARKET SHARE

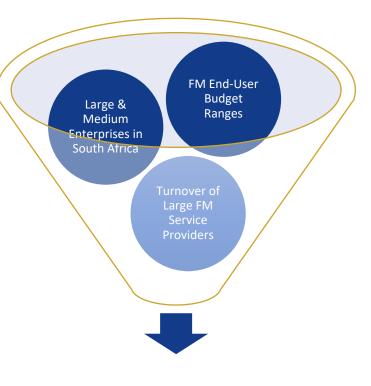
Determining the market size of the Facilities Management (FM) sector is quite challenging. This is an industry that is diverse as it is faceted, with many different players ranging from the large FM service providers, through to hundreds of small and medium sized contractors providing services such as office plants, landscaping and security.

On average, the 213 organisations interviewed for this survey collectively indicated that their FM budgets ranged from R1 million – R50 million, R60 million – R150 million and R160 million to over R800 million. These organisations represented just a cross-section of the broader FM marketplace.

In addition, this survey focused on 17 core FM service lines while the total market boasts over 50 service lines.

When determining the market size, therefore, we adopted a triangulated method based on the following:

- 1. FM budgets supplied in the survey by the respondents.
- 2. Calculating these budgets as a percentage of FM spend proportional to a) the broader FM market, and b) the number of large and medium enterprises registered in South Africa.
- 3. Validating this against the turnovers of the large FM service providers in the marketplace.



Indication of Market Size

R51.2 billion

About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

# FM MARKET SHARE

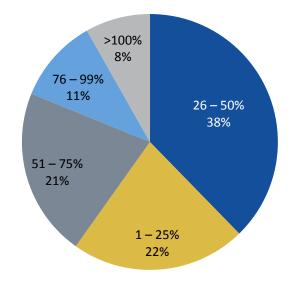
### Insourced vs. Outsourced vs. Hybrid

When asked what percentage of their total facilities were outsourced, end-users responding to the survey indicated that they did not completely outsource all their FM operations, choosing to adopt a hybrid model (partly outsourced and partly insourced).

38% of the respondents indicated that they outsource 26 - 50% of their facilities. Other respondents confirmed that they outsourced 1 - 25% (22%) and 51 - 75% (21%) of their FM operations.

Only a small percentage (8%) indicated that they outsource all their FM services to a third party FM service provider or contractor.

### WHAT PERCENTAGE OF YOUR TOTAL FM SERVICES IS OUTSOURCED?





14

About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

# FM MARKET SHARE INDICATION: SERVICE LINES

The following data sets, graphs and analyses give an <u>indication</u> of market share for key FM service lines. These findings are based on responses received to this survey as well as additional desktop and qualitative research conducted for this market analysis survey.



About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

# **FM MARKET SHARE INDICATION: SERVICE LINES**

**Integrated Facilities Management** 

Based on responses from the

survey and further desktop and quantification research, the FM

service providers with the most

Management are:

Bidvest (33%)

Tsebo (11%)

Servest (6%)

Other (22%)

Broll/CBRE (9%)

1.

2.

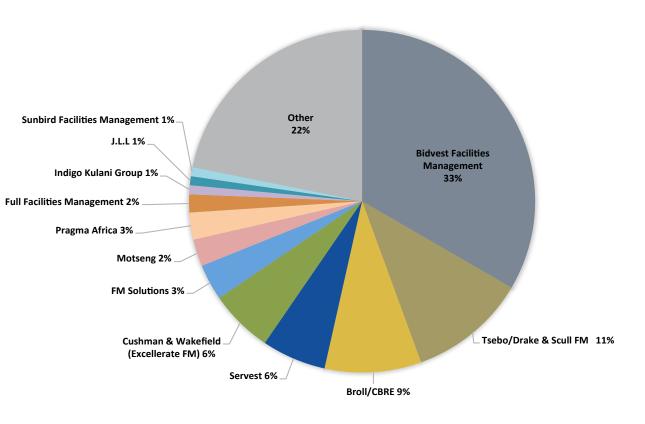
3.

4.

5.

market share in Integrated Facilities

INTEGRATED FACILITIES MANAGEMENT





16

#### About the research

#### Executive summary

Overall FM market share

FM growth and service lines

Catering

1.

2.

3.

4.

5.

is as follows:

Fedics Catering Tsebo (38%)

Compass (20%)

Royal Mnandi (6%)

Servest (9%)

Other (18%)

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

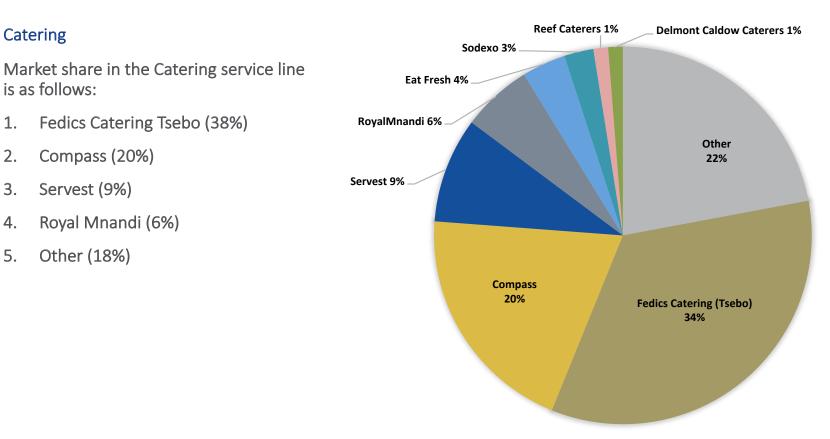
Budget ranges and cycles

Epilogue

Glossary

# | FM MARKET SHARE INDICATION: SERVICE LINES

### CATERING





Editors Note	FM MARKET SHARE INDICATION: S	FRVICE LINES
About the research		
Executive summary		
Overall FM market share	REMOTE CAMP MANAGEMENT	
FM growth and service lines	IFS Africa 7%	
Vertical industry growth	IFS AIrica 7%	
Vertical industry requirements	Fresh Camp Services 9%	
Service provider criteria		Bidvest 27%
Tenders and proposals	Africamp 9%	
Budget ranges and cycles		
Epilogue	Servest 12%	Tsebo

### **REMOTE CAMP MANAGEMENT**

# **IFS Africa 7%** % **Bidvest** 27% Tsebo 23% Other 13%

### Remote Camp Management

Market share in Remote Camp Management is as follows:

- Bidvest (27%) 1.
- Tsebo (23%) 2.
- 3. Servest (12%)
- Africamp (9%) 4.
- 5. Other (13%)



Glossary

#### About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

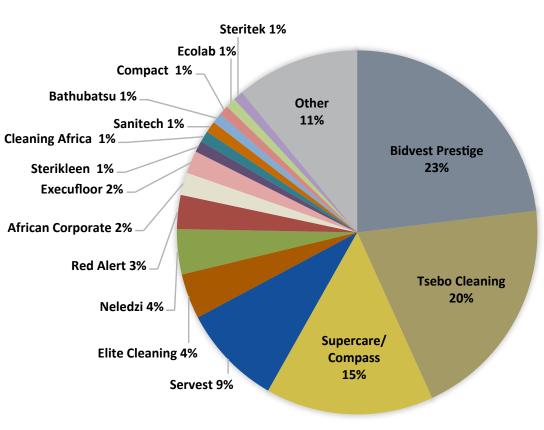
Budget ranges and cycles

Epilogue

Glossary

# FM MARKET SHARE INDICATION: SERVICE LINES

**CLEANING** 



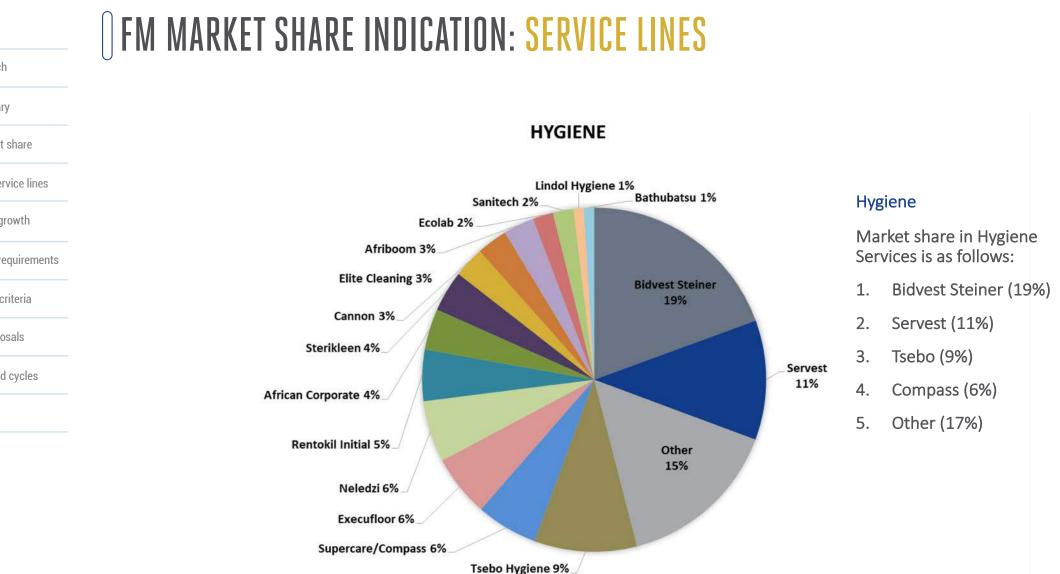
### Cleaning

Market share in Cleaning Services is as follows:

19

- 1. Bidvest (23%)
- 2. Tsebo (20%)
- 3. Compass (15%)
- 4. Servest (9%)
- 5. Other (11%)







About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary



#### About the research

#### Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

# FM MARKET SHARE INDICATION: SERVICE LINES

**Office Plants** 

as follows:

1.

2.

3.

4.

5.

Market share in Office Plants is

Servest (27%)

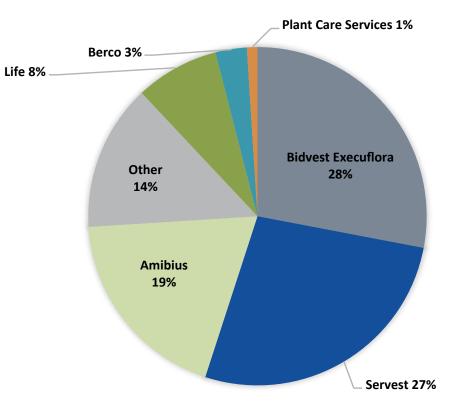
Amibius (19%)

Life (8%)

Other (14%)

Bidvest Execuflora (28%)

OFFICE PLANTS





About the research

#### Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Pest Control

1.

2.

3.

4.

5.

Market share in Pest Control

Services is as follows:

Ecolab (15%)

Bidvest (12%)

Servest (7%)

Rentokil (7%)

Other (44%)

Service provider criteria

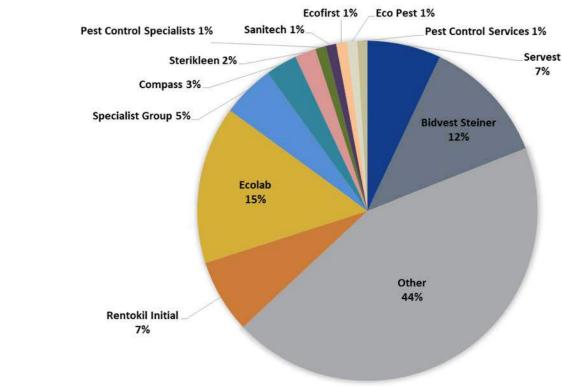
Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

# **FM MARKET SHARE INDICATION: SERVICE LINES**



PEST CONTROL



#### About the research

#### Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

# || FM MARKET SHARE INDICATION: SERVICE LINES

Water Systems

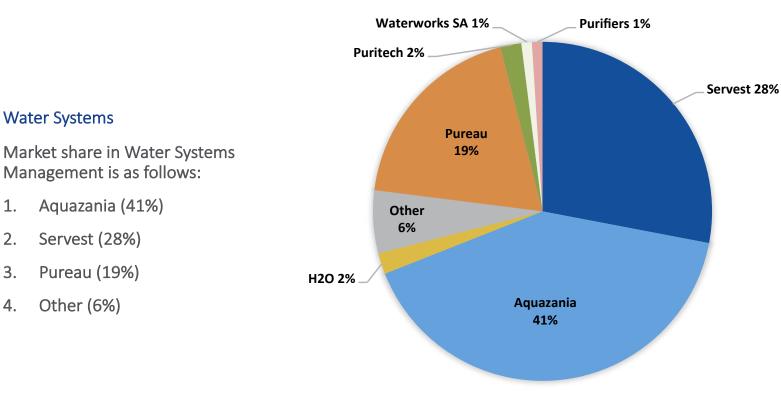
Other (6%)

1.

2.

3.

4.



### WATER SYSTEMS

#### About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

# **FM MARKET SHARE INDICATION: SERVICE LINES**

Bathubatsu 1% Ecofirst 1% Salutaire 1% Lindol 1% Pinnacle 1% Ecolab 1% Elite 2% African Corporate 2% **Bidvest Prestige** 28% Sterikleen 2% Tsebo Hygiene 3% **Rentokil Initial** 12% Supercare/Compass 6% Other 14% Cannon Hygiene 8% Servest 17%

WASHROOMS

### Washrooms

Market share in Washrooms is as follows:

- 1. Bidvest Prestige (28%)
- 2. Servest (17%)
- 3. Rentokil (12%)
- 4. Cannon Hygiene (8%)
- 5. Other (13%)



#### About the research

#### Executive summary

Overall FM market share

#### FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

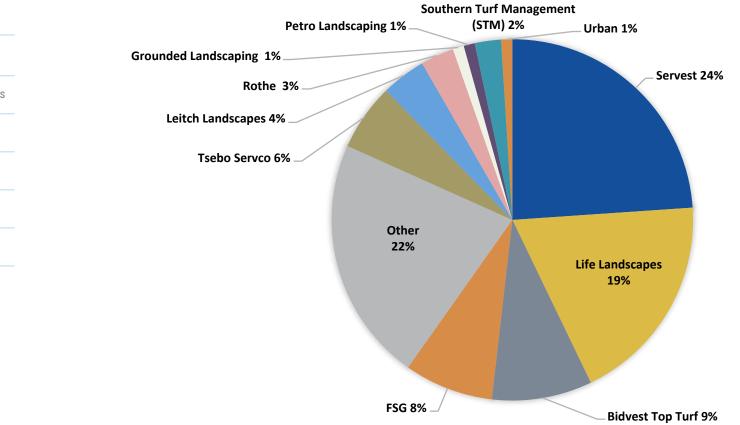
Budget ranges and cycles

Epilogue

Glossary

# **FM MARKET SHARE INDICATION: SERVICE LINES**

### LANDSCAPING



### Landscaping

Market share in Landscaping Services is as follows:

- 1. Servest (24%)
- 2. Life Landscapes (19%)
- 3. FSG (8%)
- 4. Tsebo (6%)

5. Other (22%)



#### About the research

#### Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

# | FM MARKET SHARE INDICATION: SERVICE LINES

Turf & Golf

1.

2.

3.

4.

5.

Management is as follows:

In-House (65%)

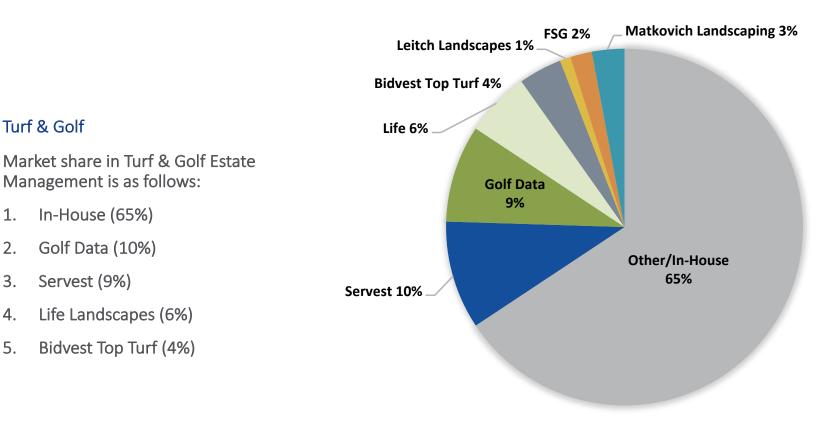
Golf Data (10%)

Life Landscapes (6%)

Bidvest Top Turf (4%)

Servest (9%)

**TURF & GOLF** 



Executive

#### About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

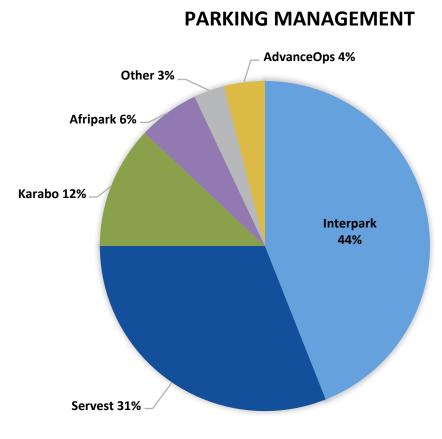
Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

# FM MARKET SHARE INDICATION: SERVICE LINES



## Parking Management

Market share in Parking Management Services\* is as follows:

- 1. Interpark (44%)
- 2. Servest (31%)
- 3. Karabo (12%)
- 4. Afripark (6%)
- 5. AdvanceOps (4%)

\*Parking Management Services include advisory services, revenue collection and management of parking operations. For the purposes of this survey, the software and hardware equipment required for parking management systems are referenced under a separate service line called Parking Control Systems.



### About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

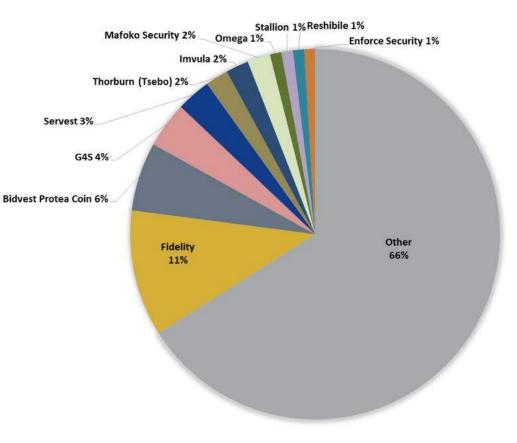
Budget ranges and cycles

Epilogue

Glossary

# **FM MARKET SHARE INDICATION: SERVICE LINES**

SECURITY SERVICES



### **Security Services**

Market share for Security Services\* is as follows:

- 1. Fidelity (11%)
- 2. Bidvest Protea Coin (6%)
- 3. G4S (4%)
- 4. Servest (3%)
- 5. Other (66%)

\*Security Services includes manned guarding, off-site monitoring and intervention services. For the purposes of this survey, the technical solutions required for security are referenced under a separate service line called Security Technical Solutions.



#### About the research

#### Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

# FM MARKET SHARE INDICATION: SERVICE LINES

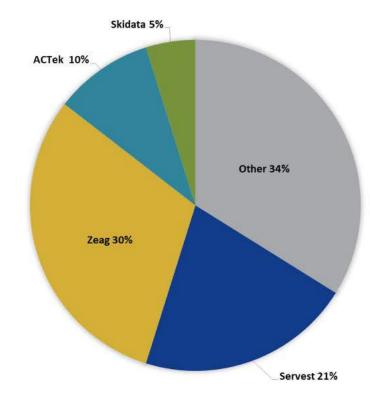
### Parking Control Systems

Market share in Parking Control Systems\* is as follows:

- 1. Zeag (30%)
- 2. Servest (21%)
- 3. Actek (10%)
- 4. Skidata (5%)
- 5. Other (34%)

\*Parking Control Systems includes bay monitoring, automated revenue systems and advanced smart solutions for parking areas. For the purposes of this survey, the advisory services, revenue collection and management of parking operations are referenced under a separate service line called Parking Management.

### PARKING CONTROL SYSTEMS





#### About the research

#### Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

# **FM MARKET SHARE INDICATION: SERVICE LINES**

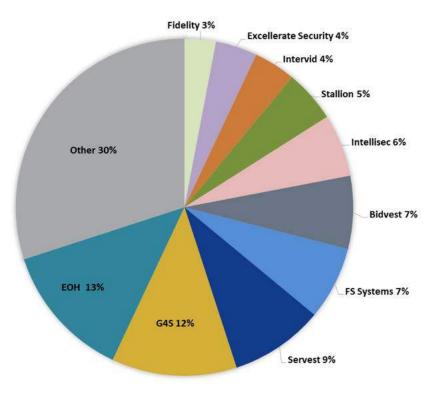
### Security Technical Solutions

Market share for Security Technical Solutions\* as follows:

- 1. EOH (13%)
- 2. G4S (12%)
- 3. Servest (9%)
- 4. FS Systems & Bidvest (7%)
- 5. Other (30%)

\*Security Technical Solutions includes alarm, intruder detection, CCTV, remote control/access and biometric systems. For the purposes of this survey, manned guard, off-site monitoring and intervention services are referenced under a separate service line called Security Services.

### SECURITY TECHNICAL SOLUTIONS





30

About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

# FM MARKET SHARE INDICATION: SERVICE LINES

Motseng 1% LDM 1% Sunbird 1% FM Solutions 1% Pragma Africa 2% J.L.L 2% Full Facilities Management 3% Cushman & Wakefield 5% **Bidvest Facilities Management 28%** Broll/CBRE 10% Other 12% Tsebo/Drake & Scull FM 21% Servest 13%

### **BUILDING MANAGEMENT SYSTEMS & ENERGY SOLUTIONS**

## Building Management Systems & Energy Solutions

Market share for Building Management Systems & Energy Solutions is as follows:

31

- 1. Bidvest (28%)
- 2. Tsebo (21%)
- 3. Servest (13%)
- 4. Broll (10%)
- 5. Other (12%)

Executive

#### About the research

#### Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

# **FM MARKET SHARE INDICATION: SERVICE LINES**

**Marine Transport Solutions** 

Servest (69%)

Albatross (9%)

Boss Marine (13%)

Pienaar Marine (9%)

is as follows:

1.

2.

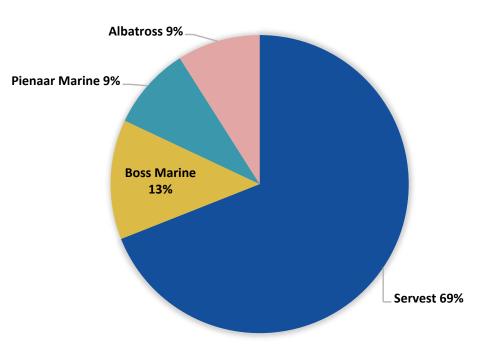
3.

4.

Market share for Marine Transport

Solutions (or offshore supply vessels)

### **MARINE TRANSPORT SOLUTIONS**



Executive

About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

# FM GROWTH & SERVICE LINES







#### About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

# **FM GROWTH & SERVICE LINES**

Respondents to the survey

substantially increase their

indicated that they will

outsourced activities for

Parking Control Systems

Management and Security

Security Services will also

and Technical Services,

**Integrated Facilities** 

Technical Solutions.

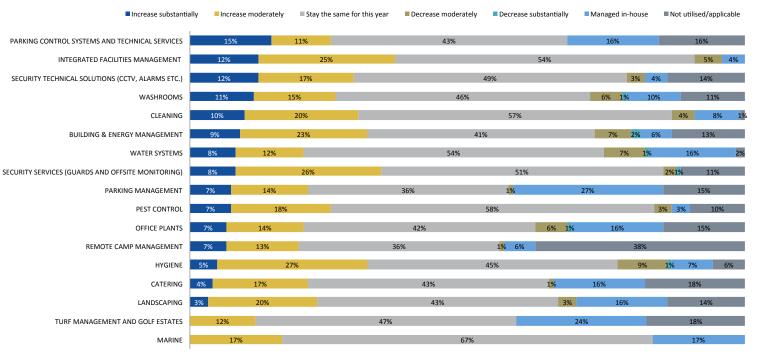
Overall, Hygiene and

witness substantial to

next 12 months.

moderate growth in the

#### HOW WILL YOUR ORGANISATION'S FM OUTSOURCED ACTIVITIES EVOLVE OR GROW OVER THE NEXT 12 MONTHS IN THE FOLLOWING AREAS?





# **FM GROWTH & SERVICE LINES**

Executive summary

About the research

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

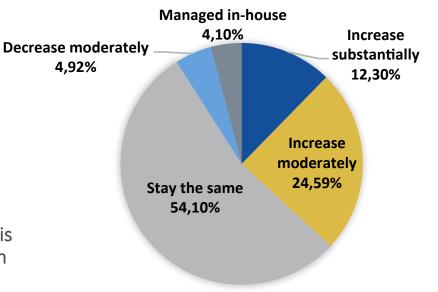
Budget ranges and cycles

Epilogue

Glossary

### How Will Your Organisation's FM Outsourced Activities Grow in the Next 12 Months?

Forecasted growth in Integrated Facilities Management is very promising over the next 12 months at 36.89%. With Integrated Facilities Management the FM provider is a single source of supply for all facilities management needs and the services are delivered under a single management team.



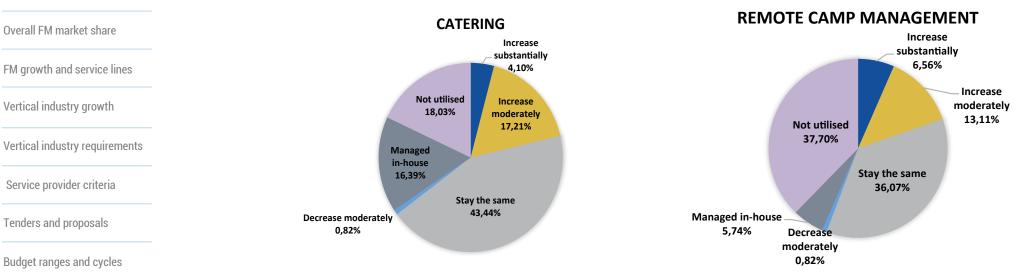
### **INTEGRATED FACILITIES MANAGEMENT**

Executive

# **FM GROWTH & SERVICE LINES**

About the research

Executive summary



Epilogue

Glossary

### How Will Your Organisation's FM Outsourced Activities Grow in the Next 12 Months?

Catering is forecasted to grow by 21.31% over the next 12 months, while Remote Camp Management services should experience growth of just under 20% (19.67%). Many organisations in Catering (43.44%) and Remote Camp Management (36.07%) indicated that their outsourced activities in this area will remain the same for the year ahead.



## FM GROWTH & SERVICE LINES

About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

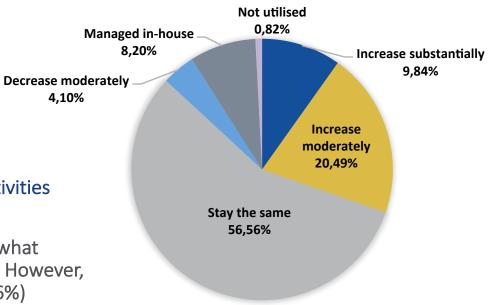
Budget ranges and cycles

Epilogue

Glossary

## How Will Your Organisation's FM Outsourced Activities Grow in the Next 12 Months?

Forecasted growth for Cleaning Services is somewhat encouraging at just over 30% for the year ahead. However, over half of the respondents to the survey (56.56%) indicated that their outsourced Cleaning Services would remain the same for the year with 4.10% saying that these services would decrease moderately.



**CLEANING SERVICES** 

Executive

About the research

#### Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

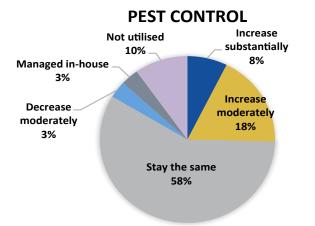
Epilogue

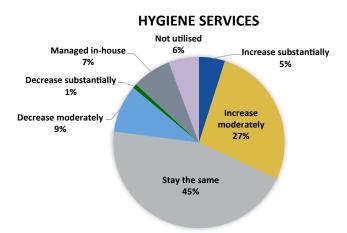
Glossary

## **FM GROWTH & SERVICE LINES**

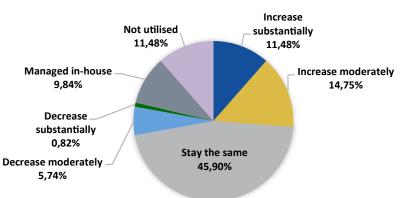
How Will Your Organisation's FM Outsourced Activities Grow in the Next 12 Months?

Hygiene (32%), Pest Control Services (26%) and Washroom facilities (26.23%) will all see substantial to moderate growth over the next 12 months. 45 – 58% of respondents to the survey indicated these outsourced services would not evolve further over the next year, while 9% of organisations will decrease hygiene services moderately.





#### WASHROOMS



#### About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

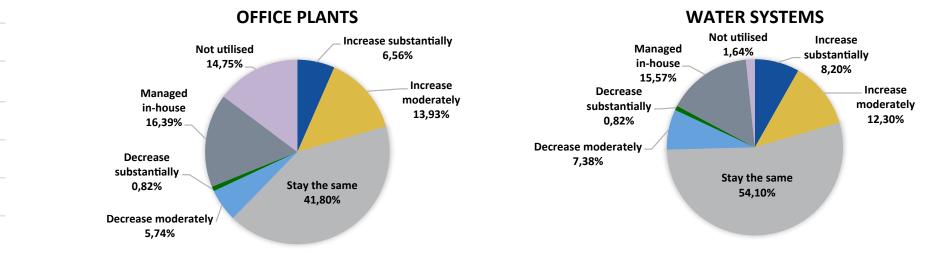
Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

## FM GROWTH & SERVICE LINES



How Will Your Organisation's FM Outsourced Activities Grow in the Next 12 Months?

Outsourced services for Office Plants (20.49%) will grow (literally and figuratively) in the next 12 months at over 20% as will Water Systems (20.5%). Office parks, buildings and organisations that utilise these services indicated that they would not develop their outsourced Office Plants services further (41.80%) and Water Systems would also remain the same for the year (54.10%).



About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

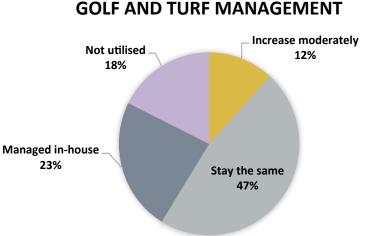
Epilogue

Glossary

## **FM GROWTH & SERVICE LINES**

## How Will Your Organisation's FM Outsourced Activities Grow in the Next 12 Months?

Teeing off for the year ahead, Golf and Turf Management outsourced services will increase moderately by 12% for the year ahead with 23% of estates indicating that they manage these services in-house and 47% indicating that their outsourced services in these areas would remain the same. Landscaping services will increase substantially and moderately at 23% for the next 12 months.



## LANDSCAPING Increase substantially Not utilised 14% Managed in-house 16% Decrease moderately 3% Stay the same 44%



## **FM GROWTH & SERVICE LINES**

About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

## Not utilised 15% 15% Managed in-house 27% Stay the same 36% Decrease moderately 1%

**PARKING MANAGEMENT** 

## How Will Your Organisation's FM Outsourced Activities Grow in the Next 12 Months?

Parking Management outsourced services is forecasted to grow by 21% in the year ahead, while 36% of respondents to the survey indicated that these activities would remain the same. A further 27% of organisations indicated that their Parking Management services are managed in-house.

Executive

## FM GROWTH & SERVICE LINES

About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

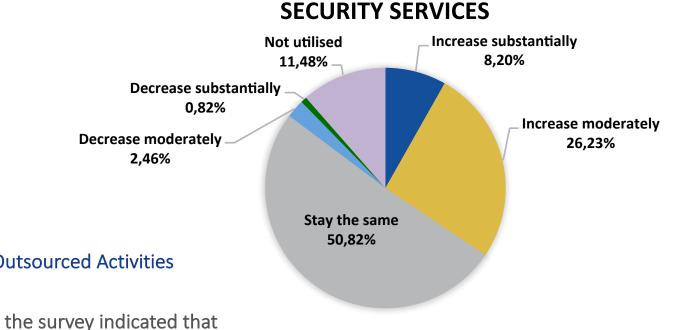
Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary



How Will Your Organisation's FM Outsourced Activities Grow in the Next 12 Months?

While over 50% of respondents to the survey indicated that their outsourced Security services would stay the same for the year, over 34% indicated that they plan to invest more in outsourced Security (including guards, offsite monitoring and intervention services) over the next 12 months.

Executive

## FM GROWTH & SERVICE LINES

About the research

**Executive summary** 

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

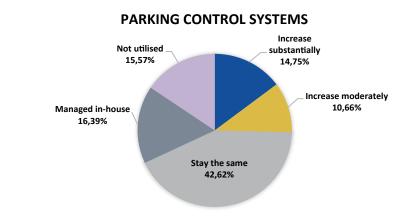
Service provider criteria

Tenders and proposals

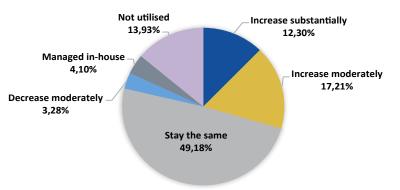
Budget ranges and cycles

Epilogue

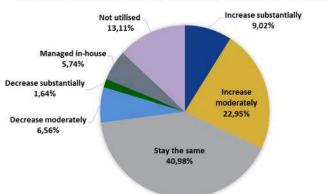
Glossary



### SECURITY TECHNICAL SOLUTIONS



#### **BUILDING MANAGEMENT SYSTEMS & ENERGY SOLUTIONS**



### How Will Your Organisation's FM Outsourced Activities Grow in the Next 12 Months?

FM operations include Technical Services that provide Building Management Systems & Energy Solutions (including HVAC systems), Parking Control Systems and Security Technical Solutions such as alarm systems and CCTV cameras. It is encouraging to see that Building Management Systems & Energy Solutions will witness a growth rate of 31.97% in the year ahead, while Parking Control Systems (25.41%) and Security Technical Solutions (29.51%) also have favourable growth forecasts.



About the research

#### Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

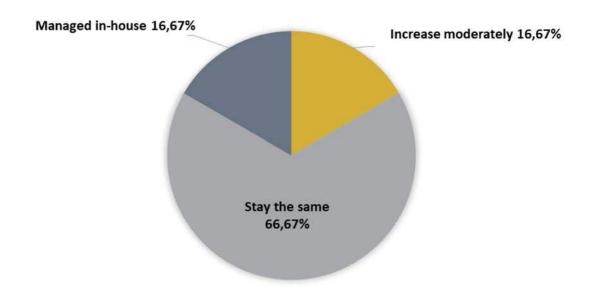
Glossary

## FM GROWTH & SERVICE LINES

## How Will Your Organisation's FM Outsourced Activities Grow in the Next 12 Months?

A very specialised area of FM, outsourced Marine Transport Solutions will enjoy moderate growth of 16.67% for the next 12 months with most shipping and port agents (66.67%) indicating that their outsourced services would remain the same for the year ahead.

## MARINE TRANSPORT SOLUTIONS





About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

## FM GROWTH & SERVICE LINES

When asked which FM

outsource in the next 12

indicated that they were

Services (44%), Cleaning

Management, Security

Services (38%) and Catering

(28%). Integrated Facilities

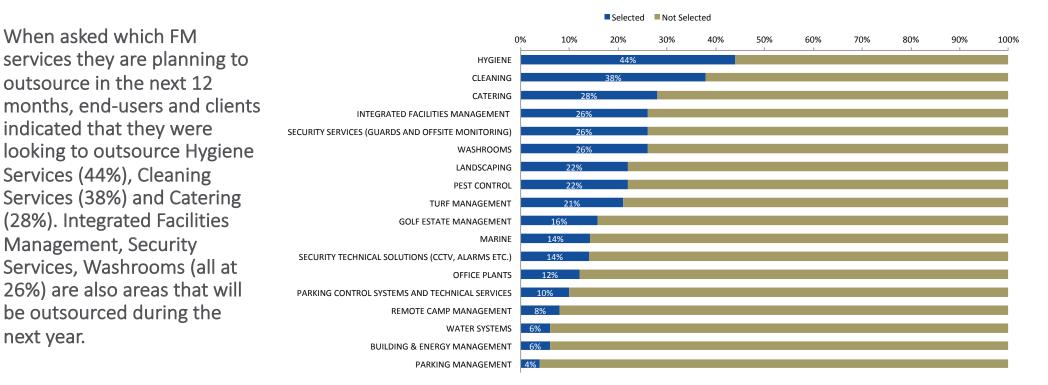
Services, Washrooms (all at

26%) are also areas that will

be outsourced during the

next year.

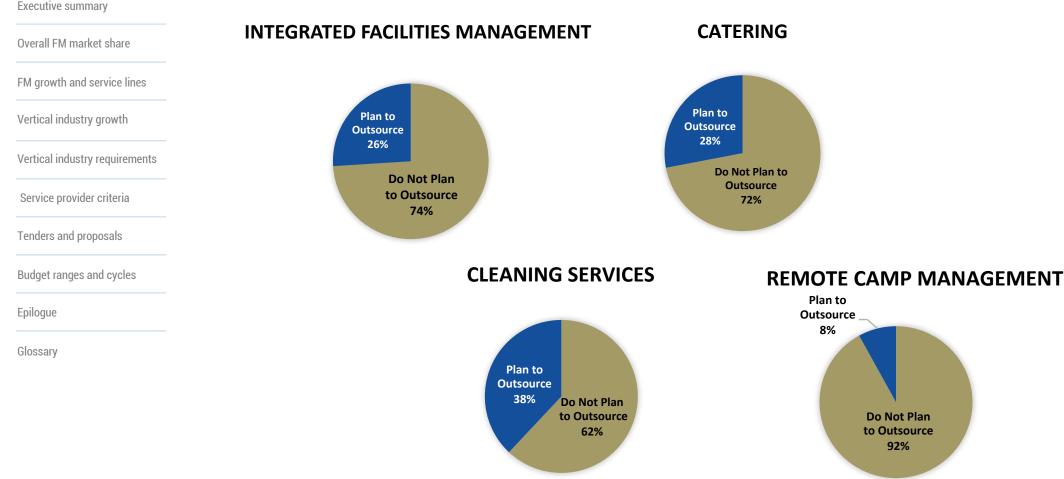
#### WHAT FM SERVICES ARE YOU PLANNING TO OUTSOURCE IN THE NEXT 12 MONTHS (IF AT ALL)?





About the research

Executive summary



FM GROWTH & SERVICE LINES



F	d	it	0	r	s	Ν	0	t	e
-	u	ιu	v	•	0	1.4	v	L	c

## FM GROWTH & SERVICE LINES

Plan to

Outsource 26%

About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

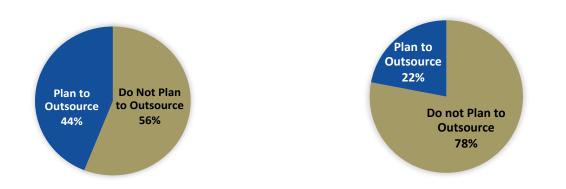
Tenders and proposals

Budget ranges and cycles

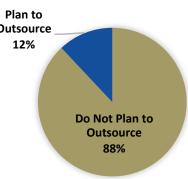
Epilogue

Glossary

## **HYGIENE SERVICES**



**WASHROOMS OFFICE PLANTS** WATER SYSTEMS Plan to Plan to Outsource Outsource 6% 12% **Do Not Plan** Do Not Plan to to Outsource Outsource 74% 94%





**PEST CONTROL** 

About the research

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

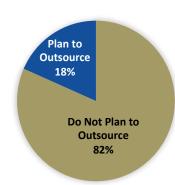
Budget ranges and cycles

Epilogue

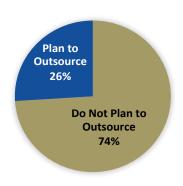
Glossary

## **GOLF AND TURF MANAGEMENT**

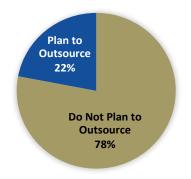
FM GROWTH & SERVICE LINES



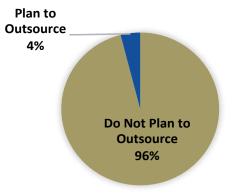
**SECURITY SERVICES** 



### LANDSCAPING



## **PARKING MANAGEMENT**



Executive



About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

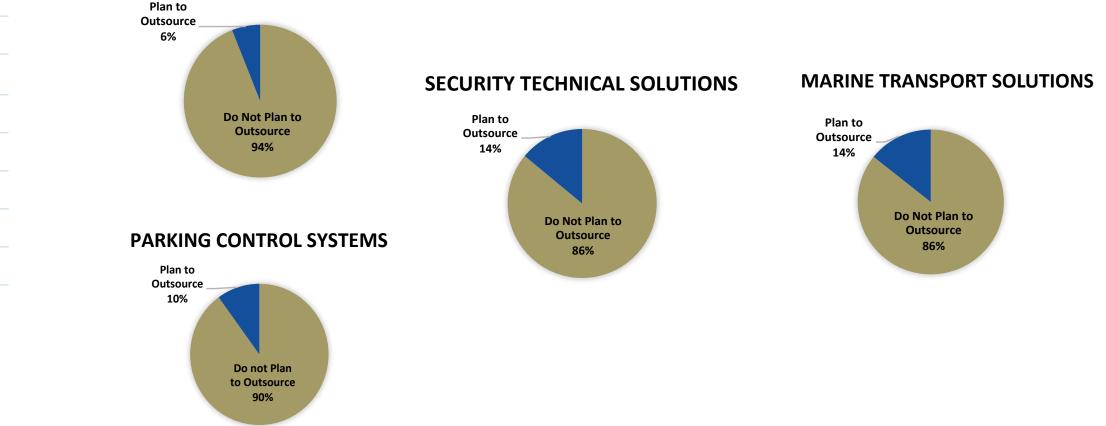
Budget ranges and cycles

Epilogue

Glossary

## FM GROWTH & SERVICE LINES

## **BUILDING MANAGEMENT SYSTEMS & ENERGY SOLUTIONS**





About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

## **VERTICAL INDUSTRY GROWTH: FM SERVICES**

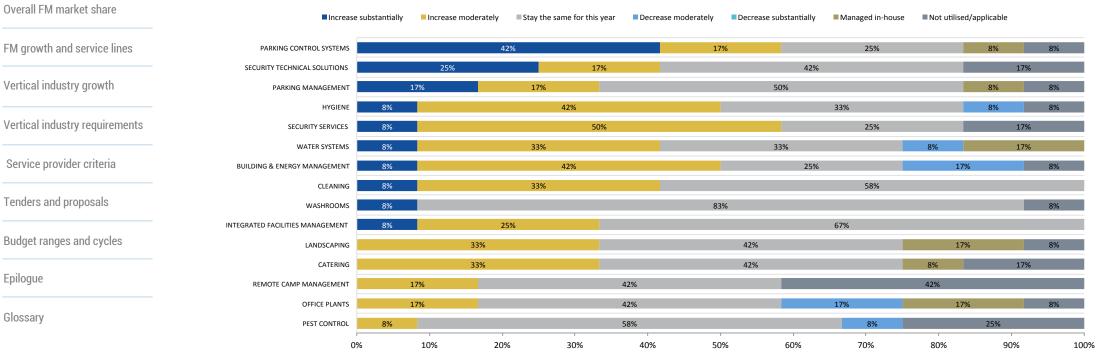




About the research

**Executive summary** 

## VERTICAL INDUSTRY GROWTH: FM SERVICES



#### **GROWTH IN BANKING & FINANCIAL OUTSOURCED FM SERVICES**

### How Will Your Organisation's FM Outsourced Activities in Banking, Financial Services & Insurance Grow in the Next 12 Months?

Banks, Insurance and Financial Service organisations will experience growth in Parking Control Systems, Security Technical Solutions, Parking Management, Hygiene, Water Systems, Cleaning, Security Services and Building Management Systems & Energy Solutions.



#### About the research

Executive summary

**GROWTH IN EDUCATION OUTSOURCED FM SERVICES** Overall FM market share Increase substantially Increase moderately Stay the same for this year Decrease moderately Decrease substantially Managed in-house Not utilised/applicable WASHROOMS FM growth and service lines PARKING CONTROL SYSTEMS 50% 25% PARKING MANAGEMENT Vertical industry growth WATER SYSTEMS 13% 38% SECURITY TECHNICAL SOLUTIONS 38% 13% Vertical industry requirements INTEGRATED FACILITIES MANAGEMENT 25% LANDSCAPING 13% 13% Service provider criteria CATERING HYGIENE 13% 63% 13% REMOTE CAMP MANAGEMENT 38% 50% Tenders and proposals 25% OFFICE PLANTS PEST CONTROL 25% Budget ranges and cycles 25% SECURITY SERVICES **BUILDING & ENERGY MANAGEMENT** 25% 38% Epilogue CLEANING 25% 63% 0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

**VERTICAL INDUSTRY GROWTH: FM SERVICES** 

Glossary

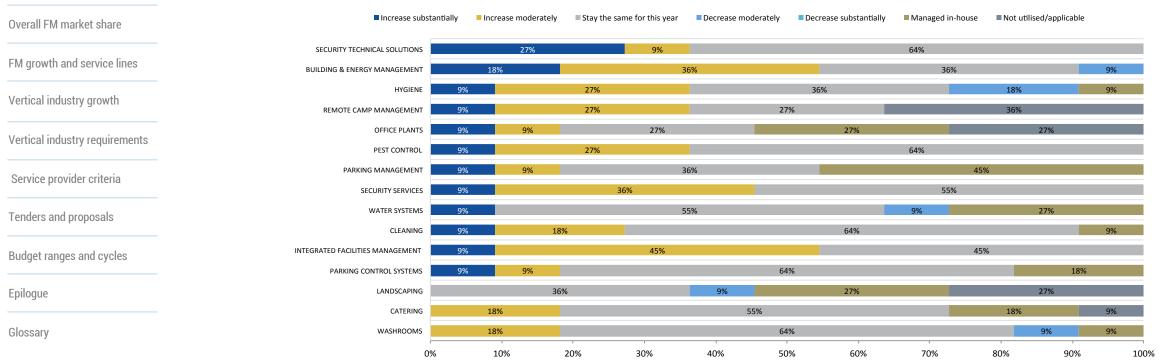
### How Will Your Organisation's FM Outsourced Activities in the Education Sector Grow in the Next 12 Months?

The Education sector forecasts growth in Washrooms, Parking Control Systems, Security Technical Solutions, Parking Management, Water Systems and Integrated Facilities Management. Pest Control, Security Services, Cleaning and Building Management Systems & Energy Solutions will experience moderate growth.



#### About the research

Executive summary



**VERTICAL INDUSTRY GROWTH: FM SERVICES** 

#### **GROWTH IN LOCAL GOVERNMENT OUTSOURCED FM SERVICES**

### How Will Your Organisation's FM Outsourced Activities in Local Government Grow in the Next 12 Months?

Local Government departments have indicated that they plan to invest more in outsourced activities for Security Technical Solutions, Building Management Systems & Energy Solutions, Hygiene, Pest Control, Security Services, Remote Camp Management, Parking Control Systems and Integrated Facilities Management. Growth in Catering and Washrooms facilities will increase moderately.

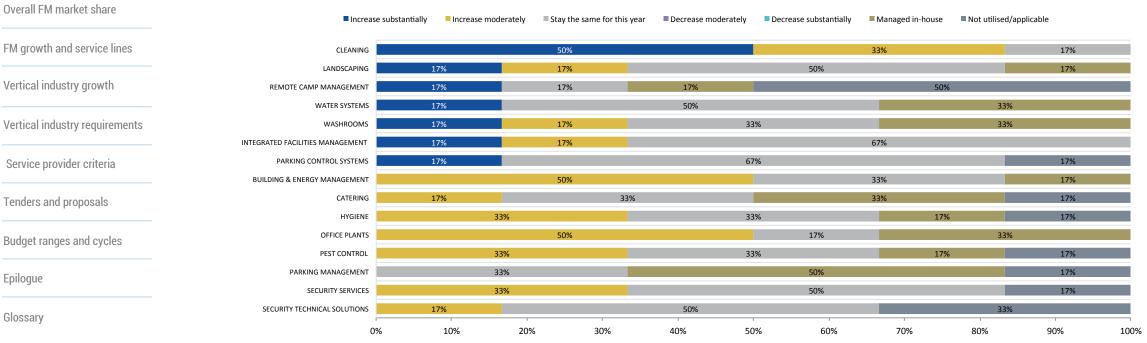


servest 53

About the research

**Executive summary** 

## **VERTICAL INDUSTRY GROWTH: FM SERVICES**



#### **GROWTH IN HEALTHCARE & MEDICAL OUTSOURCED FM SERVICES**

### How Will Your Organisation's FM Outsourced Activities in the Healthcare & Medical Sector Grow in the Next 12 Months?

Hospitals, clinics, medical and healthcare facilities indicated that Cleaning outsourced services will receive the bulk of their investment (83%). They will also substantially or moderately grow Landscaping, Washrooms, Office Plants, Parking Control Systems, Hygiene, Water Systems, Building Management Systems & Energy Solutions, Security Services and Integrated Facilities Management.



#### About the research

Executive summary

#### Increase substantially Increase moderately Stay the same for this year Decrease moderately Decrease substantially Managed in-house Not utilised/applicable Overall FM market share CATERING 17% 17% 42% 17% 8% FM growth and service lines HYGIENE 17% 17% REMOTE CAMP MANAGEMENT 8% 58% 17% 17% Vertical industry growth PEST CONTROL 17% 58% 25% WASHROOMS 50% Vertical industry requirements SECURITY TECHNICAL SOLUTIONS 25% 00/ 58% LANDSCAPING 17% Service provider criteria 58% 17% OFFICE PLANTS 8% 17% PARKING MANAGEMENT 8% 42% 50% Tenders and proposals SECURITY SERVICES 17% 75% Budget ranges and cycles WATER SYSTEMS 8% 58% 25% **BUILDING & ENERGY MANAGEMENT** 33% 42% Epilogue CLEANING 17% 58% 17% INTEGRATED FACILITIES MANAGEMENT 75% Glossary PARKING CONTROL SYSTEMS 8% 50% 0% 33% 8% 10% 20% 30% 40% 50% 60% 70% 80% 90% 0% 100%

## VERTICAL INDUSTRY GROWTH: FM SERVICES

**GROWTH IN HOSPITALITY & LEISURE OUTSOURCED FM SERVICES** 

### How Will Your Organisation's FM Outsourced Activities in Hospitality & Leisure Grow in the Next 12 Months?

Hotels, recreation, and leisure operators will increase their outsourced Catering services along with Washrooms, Hygiene, Remote Camp Management, Pest Control, Security Technical Solutions and Building Management Systems & Energy Solutions.



## **VERTICAL INDUSTRY GROWTH: FM SERVICES**

About the research

Executive summary

### GROWTH IN INDUSTRIAL & MANUFACTURING OUTSOURCED FM SERVICES

Overall FM market share	Increase subst	antially	Increase mod	lerately I	Stay the sar	me for this year	Decrease moderately	Decrease sub:	stantially	Managed in-hou	ise No	utilised/	applicable	
	SECURITY SERVICES		25%			8%			58%					8%
FM growth and service lines	CATERING		17%		17%				58%					8%
	OFFICE PLANTS		17%				58%				8%		8%	8%
Vertical industry growth	PEST CONTROL		17%					75%						8%
	INTEGRATED FACILITIES MANAGEMENT		17%		17%			42%			8%		17	%
Vertical industry requirements		8%	8%				50%			17	7%		17	%
Service provider criteria	HYGIENE	8%		259	%			42%					25%	
	REMOTE CAMP MANAGEMENT	8%	8%				42%		8%	8%			25%	
Tenders and proposals		8%	8%				50%			8%		17%		8%
	WATER SYSTEMS	8%					67%					17%		8%
Budget ranges and cycles	BUILDING & ENERGY MANAGEMENT	8%					58%					33%		
	CLEANING	8%		17%				58%					8%	8%
Epilogue	WASHROOMS	8%		259	%			50%					17	%
	SECURITY TECHNICAL SOLUTIONS	8%		259	%			50%					17	%
Glossary	PARKING CONTROL SYSTEMS	8%	8%				42%			25%			17	%
	0%		10%	20%		30%	40% 5	i0% 6	50%	70%	80%		90%	1

### How Will Your Organisation's FM Outsourced Activities in the Industrial & Manufacturing Sector Grow in the Next 12 Months?

There will be substantial to moderate growth in all service lines for industrial and manufacturing organisations, more particularly in outsourced Security Services, Catering, Washrooms, Security Technical Services, Hygiene, Cleaning and Integrated Facilities Management.



About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

## VERTICAL INDUSTRY GROWTH: FM SERVICES



Increase substantially	Increase moderately	Stay the same for this yea	r Decrease moderately	Decrease substant	ially  Managed in-house	Not utilised/applicable
WASHROOMS	29%		14% 14	4%	29%	14%
LANDSCAPING	14%		43%		14%	29%
HYGIENE	14%		43%		14% 14	4% 14%
SECURITY SERVICES	14%	29%		29%		29%
WATER SYSTEMS	14%		57%		14	4% 14%
CLEANING	14%		57%		14	4% 14%
SECURITY TECHNICAL SOLUTIONS	14%		43%		43	3%
PARKING CONTROL SYSTEMS	14%	14%	14%	4%	43	3%
CATERING		43%	1	4%	43	3%
REMOTE CAMP MANAGEMENT		43%			57%	
OFFICE PLANTS	29%		29%		29%	14%
PEST CONTROL	29%			57%		14%
PARKING MANAGEMENT	29%		4.	3%		29%
BUILDING & ENERGY MANAGEMENT	14%		7	1%		14%
INTEGRATED FACILITIES MANAGEMENT		43%			57%	
0%	10%	20% 30%	40% 50	0% 60%	70%	80% 90% 100

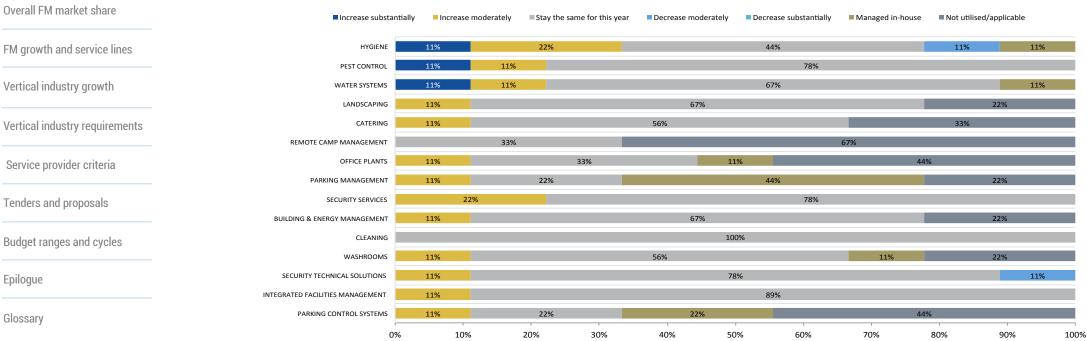
### How Will Your Organisation's FM Outsourced Activities in the Mining Sector Grow in the Next 12 Months?

The mining sector will place greater focus on Washrooms, Landscaping, Hygiene, Security Services, Cleaning, Security Technical Solutions and Parking Control Systems over the course of the next 12 months.



About the research

Executive summary



**VERTICAL INDUSTRY GROWTH: FM SERVICES** 

#### GROWTH IN PROFESSIONAL SERVICES OUTSOURCED FM SERVICES

### How Will Your Organisation's FM Outsourced Activities in Professional Services Grow in the Next 12 Months?

Outsourced Hygiene, Pest Control and Water Systems will receive substantial to moderate growth over the next 12 months in the professional services sector. Landscaping, Catering, Office Plants, Parking Management, Security Services, Washrooms, Parking Control Systems, Building Management Systems & Energy Solutions and Integrated Facilities Management will all experience moderate growth. servest



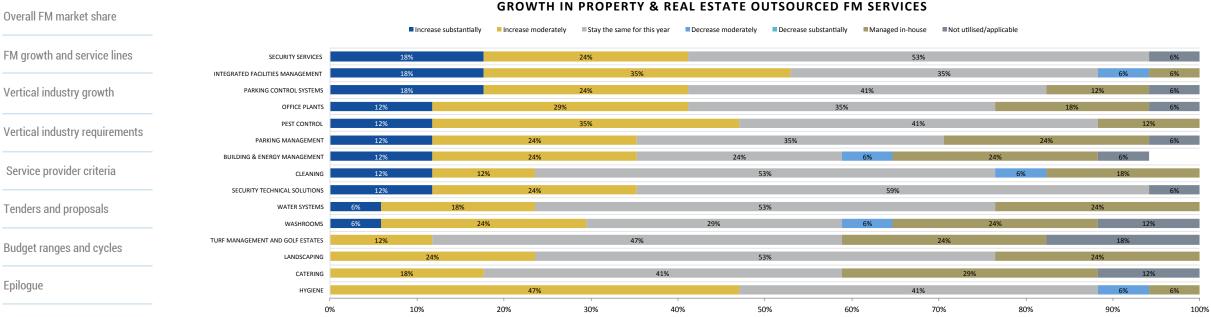
Epilogue

Glossary

#### About the research

Executive summary

## **VERTICAL INDUSTRY GROWTH: FM SERVICES**



Glossary

### How Will Your Organisation's FM Outsourced Activities in Property & Real Estate Grow in the Next 12 Months?

The property and real estate market has forecast substantial to moderate growth in outsourced services for Integrated Facilities Management, Security Services, Parking Control Systems, Pest Control, Parking Management, Office Plants, Cleaning, Washrooms, Security Technical Solutions and Building Management Systems & Energy Solutions.



#### About the research

## VERTICAL INDUSTRY GROWTH: FM SERVICES

#### Executive summary Increase moderately Stay the same for this year Decrease moderately Managed in-house Increase substantially Decrease substantially Not utilised/applicable Overall FM market share INTEGRATED FACILITIES MANAGEMENT 31% 23% 38% **BUILDING & ENERGY MANAGEMENT** 23% FM growth and service lines CLEANING 23% 23% 46% 38% PARKING CONTROL SYSTEMS 15% 15% 31% Vertical industry growth LANDSCAPING CATERING 38% Vertical industry requirements OFFICE PLANTS 54% 54% Service provider criteria PEST CONTROL SECURITY SERVICES 23% 46% Tenders and proposals WATER SYSTEMS 54% WASHROOM Budget ranges and cycles SECURITY TECHNICAL SOLUTIONS 31% HYGIENE 77% Epilogue REMOTE CAMP MANAGEMENT PARKING MANAGEMENT 23% 200 0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

#### GROWTH IN RETAIL & DISTRIBUTION OUTSOURCED FM SERVICES

### Glossary

### How Will Your Organisation's FM Outsourced Activities in Retail & Distribution Grow in the Next 12 Months?

Over the next 12 months, retailers, wholesalers and distribution operators will invest more in outsourced services for Integrated Facilities Management, Building Management Systems & Energy Solutions, Cleaning, Landscaping, Security Services, Catering, Office Plants, Pest Control, Parking Control Systems, and Security Technical Solutions.



About the research

Executive summary

## VERTICAL INDUSTRY GROWTH: FM SERVICES

### **GROWTH IN TELECOMMUNICATIONS OUTSOURCED FM SERVICES**

Overall FM market share	Increase substantially	Increase moderately	Stay the same for this year	Decrease moderately	Decrease substantially	Managed in-house	Not utilised/applicable	
FM growth and service lines	PEST CONTROL	20%		40%		20%	20%	
	PARKING MANAGEMENT	20%	20%	20	)%		40%	
Vertical industry growth	BUILDING & ENERGY MANAGEMENT	20%		40%		20%	20%	
, ,	WASHROOMS	20%		40%		20%	20%	
Vertical industry requirements	INTEGRATED FACILITIES MANAGEMENT	20%	20%		40%		20%	
ventical industry requirements	LANDSCAPING		40%			60%		
Service provider criteria	CATERING		60%			20%	20%	
	HYGIENE		40%		40%		20%	
	REMOTE CAMP MANAGEMENT	20%	20%			60%		
Tenders and proposals	OFFICE PLANTS	20%		40%		20%	20%	
	SECURITY SERVICES	20%		40%			40%	
Budget ranges and cycles	WATER SYSTEMS		60%				40%	
	CLEANING		60%			20%	20%	
Epilogue	SECURITY TECHNICAL SOLUTIONS	20%	20%	20	)%		40%	
	PARKING CONTROL SYSTEMS			10	0%			0%
Glossary	0%	10%	20% 30%	40% 50	0% 60%	70%	80% 90%	100%

### How Will Your Organisation's FM Outsourced Activities in the Telecommunications Sector Grow in the Next 12 Months?

Telecom operators will place more emphasis on deploying and growing outsourced Pest Control, Parking Management and Washrooms facilities in the next 12 months. There will be definitive growth in outsourced Integrated Facilities Management and Building Management Systems & Energy Solutions services, while Catering and Water Systems will receive above average moderate growth.



#### About the research

Executive summary

Overall FM market share	Increase substantially	Increase	e moderately	Stay the	e same for this year	Decrease moderat	ely 🗖 D	ecrease substantially	Managed in-house	Not uti	lised/applicable
	WASHROOMS			38%		13%			50%		
FM growth and service lines	OFFICE PLANTS		25%					63%			13%
	WATER SYSTEMS	13%			25%				63%		
Vertical industry growth	BUILDING & ENERGY MANAGEMENT	13%		13%			50%			13%	13%
	SECURITY TECHNICAL SOLUTIONS	13%		13%				63%			13%
Vertical industry requirements	INTEGRATED FACILITIES MANAGEMENT	13%			25%			50%			13%
	PARKING CONTROL SYSTEMS	13%			25%		25%		25%		13%
Service provider criteria	MARINE	17%					67%				17%
•	LANDSCAPING			38%		13%			38%		13%
Fenders and proposals	CATERING	13%				63%				13%	13%
	HYGIENE			38%				50%			13%
Budget ranges and cycles	REMOTE CAMP MANAGEMENT		25%			25%		13%		38%	
suger ranges and cycles	PEST CONTROL	13%					75%				13%
Epilogue	PARKING MANAGEMENT	13%			38%			25%			25%
Lphogue	SECURITY SERVICES			38%				38%			25%
Classer	CLEANING		25%					63%			13%
Glossary	0%	10	)%	20%	30%	40%	50%	60%	70%	80%	90%

VERTICAL INDUSTRY GROWTH: FM SERVICES

#### **GROWTH IN TRAVEL & TRANSPORT OUTSOURCED FM SERVICES**

### How Will Your Organisation's FM Outsourced Activities in Travel & Transport Grow in the Next 12 Months?

Travel and transport operators have indicated that they will grow outsourced activities for Washrooms, Office Plants, Water Systems, Parking Control Systems, Security Technical Solutions, Integrated Facilities Management and Building Management Systems & Energy Solutions substantially to moderately over the next year.



About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

## **VERTICAL INDUSTRY BUSINESS REQUIREMENTS**





About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

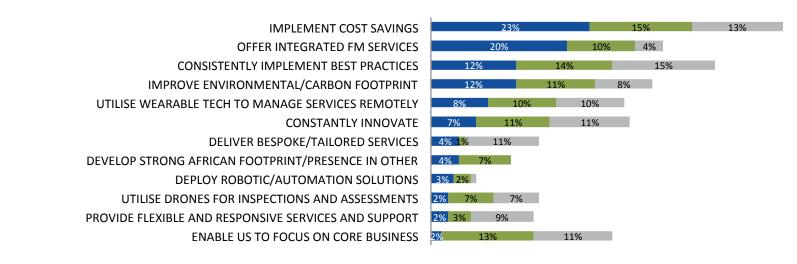
Glossary

## **VERTICAL INDUSTRY BUSINESS REQUIREMENTS**

### What Should Service Provider(s) be Doing to Keep Your Business & Loyalty?

Overall, FM service providers and contractors should implement cost savings, offer integrated FM services and consistently implement best practices in order to retain the loyalty of their clients.

### WHAT SHOULD YOUR SERVICE PROVIDER(S) BE DOING TO KEEP YOUR BUSINESS AND LOYALTY ?



■ Top 1 ■ Top 2 ■ Top 3



About the research

#### Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

## **VERTICAL INDUSTRY BUSINESS REQUIREMENTS**

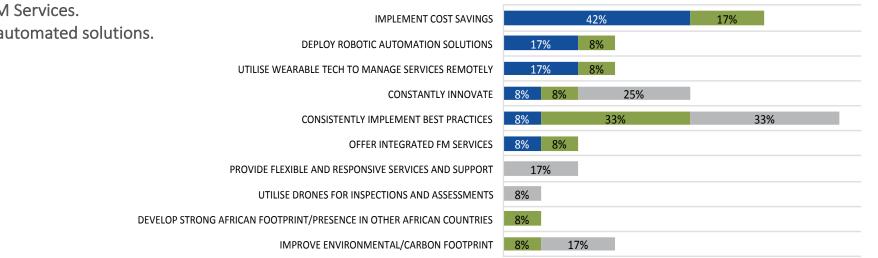
### Banking, Financial Services & Insurance:

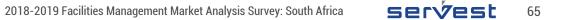
To retain end-users and clients in the BFSI sector, FM service providers and contractors should:

- 1. Continue to implement cost savings.
- 2. Consistently implement best practices.
- 3. Constantly innovate.
- 4. Offer integrated FM Services.
- 5. Deploy robotic or automated solutions.

## WHAT SHOULD BANKING & FINANCIAL FM SERVICE PROVIDER(S) BE DOING TO KEEP YOUR BUSINESS AND LOYALTY?

#### ■ Top 1 ■ Top 2 ■ Top 3







About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

**VERTICAL INDUSTRY BUSINESS REQUIREMENTS** 

## WHAT SHOULD FM SERVICE PROVIDER(S) TO THE EDUCATION SECTOR BE DOING TO KEEP YOUR BUSINESS AND LOYALTY?

■ Top 1 ■ Top 2 ■ Top 3



### **Education:**

To retain end-users and clients in the Education sector, FM service providers and contractors should:

- Consistently implement best practices. 1.
- Improve environmental footprint. 2.
- Offer integrated FM Services. 3.
- Utilise wearable tech to manage services remotely. 4.
- 5. Enable end-user/client to focus on their core business



About the research

## **VERTICAL INDUSTRY BUSINESS REQUIREMENTS**

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

### **Local Government:**

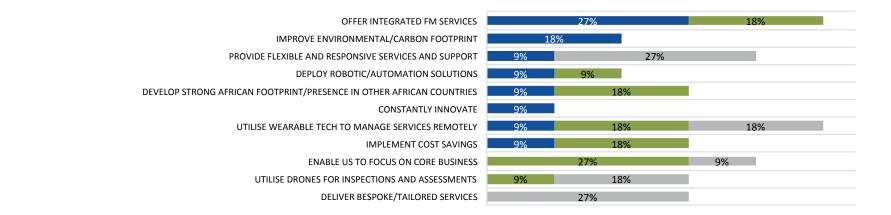
To retain Local Government end-users and clients, FM service providers and contractors should:

- 1. Offer integrated FM Services.
- 2. Utilise wearable tech to manage services remotely.
- 3. Improve environmental/carbon footprint.
- 4. Provide flexible and responsive services and support.
- 5. Continue to implement cost savings.

Executive

### WHAT SHOULD FM SERVICE PROVIDER(S) FOR LOCAL GOVERNMENT BE DOING TO KEEP BUSINESS AND LOYALTY?

■ Top 1 ■ Top 2 ■ Top 3



About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

## **VERTICAL INDUSTRY BUSINESS REQUIREMENTS**

#### Healthcare & Medical:

To keep the loyalty of Healthcare & Medical end-users or clients, FM service providers and contractors should:

- 1. Continue to implement cost savings.
- 2. Utilise wearable tech to manage services.
- 3. Consistently implement best practices.
- 4. Offer integrated FM Services.
- 5. Utilise drones for inspections and assessments.

## WHAT SHOULD HEALTHCARE & MEDICAL FM SERVICE PROVIDER(S) BE DOING TO KEEP YOUR BUSINESS AND LOYALTY?

■ Top 1 ■ Top 2 ■ Top 3

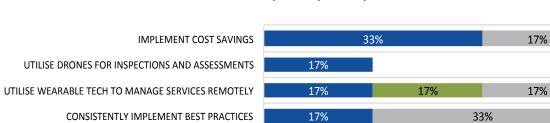
OFFER INTEGRATED FM SERVICES

CONSTANTLY INNOVATE

ENABLE US TO FOCUS ON CORE BUSINESS

IMPROVE ENVIRONMENTAL/CARBON FOOTPRINT

DEVELOP STRONG AFRICAN PRESENCE IN OTHER AFRICAN COUNTRIES



17%

17%

17%

17%



33%

17%

17%



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#### About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget	ranges	and	cycles	

Epilogue

Glossary

## **VERTICAL INDUSTRY BUSINESS REQUIREMENTS**

WHAT	SHOULD	HOSPI	TALIT	Y & LE	ISURE	FM	SER	/ICE	PROVID	ER(S)
	BE DOIN	IG TO I	кеер у	′OUR	BUSIN	ESS /	AND	LOY	ALTY?	

■Top 1 ■Top 2 ■Top 3

	CONSISTENTLY IMPLEMENT BEST PRACTICES	25%		17%	17%	
anges and cycles	IMPLEMENT COST SAVINGS	25%		17%	17%	1
	OFFER INTEGRATED FM SERVICES	17%	8%			
	PROVIDE FLEXIBLE AND RESPONSIVE SERVICES AND SUPPORT	8% 8%	17%			
	DELIVER BESPOKE/TAILORED SERVICES	8% 8%				
	CONSTANTLY INNOVATE	8% 8%				
	UTILISE WEARABLE TECH TO MANAGE SERVICES REMOTELY	8% 8%				
	ENABLE US TO FOCUS ON CORE BUSINESS	17%	17%			
	UTILISE DRONES FOR INSPECTIONS AND ASSESSMENTS	8%				
	DEVELOP STRONG AFRICAN FOOTPRINT/PRESENCE IN OTHER AFRICAN COUNTRIES	8%				
	IMPROVE ENVIRONMENTAL/CARBON FOOTPRINT	25%				

### **Hospitality & Leisure:**

To retain end-users and clients that are hotels, recreational or leisure operators, FM service providers and contractors should:

- 1. Consistently implement best practices.
- Continue to implement cost savings. 2.
- Provide flexible and responsive services and support. 3.
- Enable clients to focus on their core business. 4.
- 5. Offer integrated FM Services.



About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

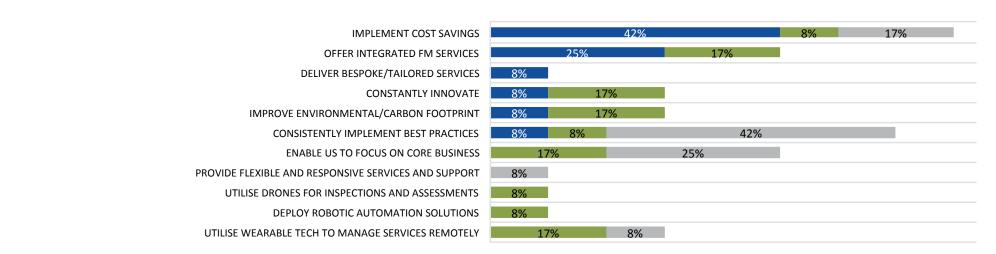
## **VERTICAL INDUSTRY BUSINESS REQUIREMENTS**

### Industrial & Manufacturing:

Industrial & Manufacturing end-users and clients remain loyal if FM service providers and contractors:

- 1. Continue to implement cost savings.
- 2. Offer integrated FM Services.
- 3. Consistently implement best practices.
- 4. Enable clients to focus on their core business.
- 5. Constantly innovate.

## WHAT SHOULD INDUSTRIAL & MANUFACTURING FM SERVICE PROVIDER(S) BE DOING TO KEEP YOUR BUSINESS AND LOYALTY?



■Top 1 ■Top 2 ■Top 3



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About the research

#### Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry re	quirements
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Service provider criteria

Tenders and proposals

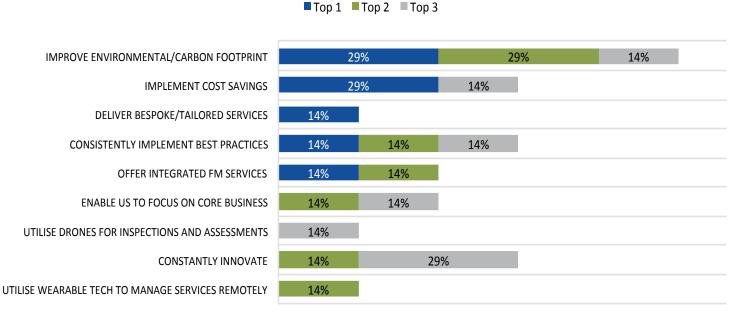
Budget ranges and cycles

Epilogue

Glossary

## **VERTICAL INDUSTRY BUSINESS REQUIREMENTS**

## WHAT SHOULD FM SERVICE PROVIDER(S) TO THE MINING SECTOR DO TO KEEP YOUR BUSINESS AND LOYALTY?



### Mining:

To keep Mining end-users and clients loyal, FM service providers and contractors should:

- 1. Improve environmental/carbon footprint
- 2. Continue to implement cost savings.
- 3. Consistently implement best practices.
- 4. Constantly innovate.
- 5. Deliver bespoke/tailored services.



About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

## **VERTICAL INDUSTRY BUSINESS REQUIREMENTS**

#### **Professional Services:**

Professional Services end-users and clients require that FM service providers and contractors do the following to keep their business and loyalty:1. Improve environmental/carbon footprint.

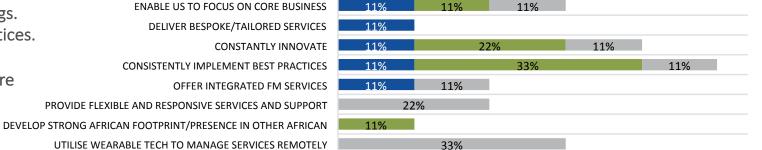
- 2. Continue to implement cost savings.
- 3. Consistently implement best practices.
- 4. Constantly innovate.
- 5. Enable clients to focus on their core business.

# IMPROVE ENVIRONMENTAL/CARBON FOOTPRINT 22% IMPLEMENT COST SAVINGS 22% ENABLE US TO FOCUS ON CORE BUSINESS 11%

WHAT SHOULD FM SERVICE PROVIDER(S) FOR THE PROFESSIONAL SERVICES SECTOR BE DOING TO KEEP YOUR

**BUSINESS AND LOYALTY?** 

Top 1 Top 2 Top 3



11%



About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

# **VERTICAL INDUSTRY BUSINESS REQUIREMENTS**

Property & Real Estate firms believe FM service providers and contractors should do the following to retain their business:

- 1. Continue to implement cost savings.
- 2. Improve environmental/carbon footprint.
- 3. Offer integrated FM Services.

**Property & Real Estate:** 

- 4. Consistently implement best practices.
- 5. Enable clients to focus on their core business.

### WHAT SHOULD FM PROPERTY & REAL ESTATE SERVICE PROVIDER(S) BE DOING TO KEEP YOUR BUSINESS AND LOYALTY?

### ■ Top 1 ■ Top 2 ■ Top 3





About the research

### Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

2. 3.

4. 5.

Epilogue

Glossary

# **VERTICAL INDUSTRY BUSINESS REQUIREMENTS**

Improve environmental/carbon footprint.

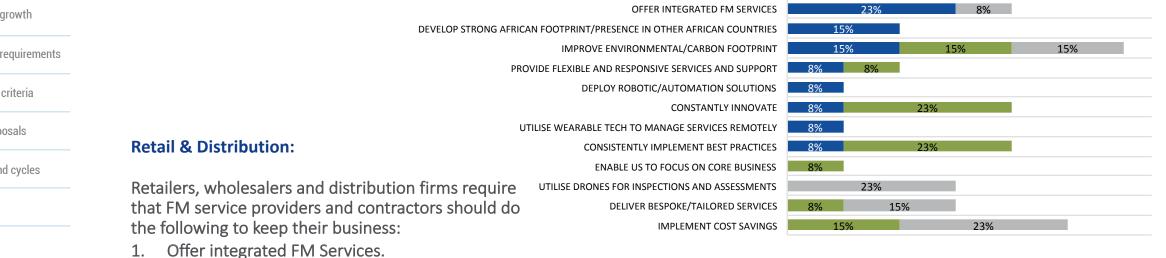
Develop strong African footprints in other

Consistently implement best practices.

African countries. Constantly innovate.

### WHAT FM RETAIL & DISTRIBUTION SERVICE PROVIDER(S) BE DOING TO KEEP YOUR BUSINESS AND LOYALTY?

■Top 1 ■Top 2 ■Top 3



Executive

74

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Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

## WHAT FM TELECOMMUNICATIONS SERVICE PROVIDER(S) BE DOING TO KEEP YOUR BUSINESS AND LOYALTY?

VERTICAL INDUSTRY BUSINESS REQUIREMENTS

■ Top 1 ■ Top 2 ■ Top 3

### **Telecommunications:**

To retain Telecommunications organisations and clients, FM service providers and contractors should:

- Offer integrated FM Services. 1.
- Enable clients to focus on their core business. 2.
- 3. Utilise drones for inspections and assessments.
- Utilise wearable tech to manage services remotely. 4.
- 5. Implement cost savings.

OFFER INTEGRATED FM SERVICES 40% ENABLE US TO FOCUS ON CORE BUSINESS 20% 20% UTILISE DRONES FOR INSPECTIONS AND ASSESSMENTS 20% 20% UTILISE WEARABLE TECH TO MANAGE SERVICES REMOTELY DELIVER BESPOKE/TAILORED SERVICES 20% CONSTANTLY INNOVATE 20% 20% 40% IMPROVE ENVIRONMENTAL/CARBON FOOTPRINT CONSISTENTLY IMPLEMENT BEST PRACTICES 20% IMPLEMENT COST SAVINGS 40% 20%



Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

# **VERTICAL INDUSTRY BUSINESS REQUIREMENTS**



13% 13%

13%

13%

13%

DELIVER BESPOKE/TAILORED SERVICES

CONSISTENTLY IMPLEMENT BEST PRACTICES

UTILISE WEARABLE TECH TO MANAGE SERVICES REMOTELY

25%

25%

13%

13%

13%

25%

### **Travel & Transportation:**

To retain the business of Travel & Transportation end-users and clients, FM service providers and contractors should:

- Continue to implement cost savings. 1.
- 2. Utilise drones for inspections and assessments.
- 3. Offer integrated FM Services.
- Constantly innovate. 4.
- 5. Enable clients to focus on their core business.



2018-2019 Facilities Management Market Analysis Survey: South Africa 76 ser



About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

# **FM SERVICE PROVIDER REQUIREMENTS**





77

# **FM SERVICE PROVIDER REQUIREMENTS**

About the research

Executive summary

### PLEASE RATE YOUR LEVEL OF SATISFACTION WITH THE FOLLOWING SERVICES/ATTRIBUTES FROM YOUR FM SERVICE PROVIDERS

Overall FM market share	Complete Com	etely satisfied	Somewha	at satisfied Satisfied	Mostly satisfied	
FM growth and service lines	TECHNICAL EXPERTISE	3	30%	<b>7%</b> 20%	42%	2%
	B-BBEE	28	8%	<mark>4%</mark> 27%	41%	
Vertical industry growth	TIME MANAGEMENT	21%	6%	22%	48%	3%
	QUALITY OF STAFF/EXPERTISE	20%	5%	23%	49%	2%
Vertical industry requirements	SUPPORT LEVELS	19%	3%	22%	52%	3%
	ACCESS TO BEST PRACTICES	18%	9%	34%	35%	3%
Service provider criteria	EASE OF DOING BUSINESS	16%	7%	14%	62%	1%
Tenders and proposals	INFRASTRUCTURE AND NETWORK	12% 5	5%	37%	45%	1 <mark>%</mark>
	INNOVATION WITH DELIVERY AND SERVICES	11%	9%	30%	46%	3%
Budget ranges and cycles	SERVICE LEVELS	11%	7%	23%	57%	1 <mark>%</mark>
	COST AND SAVINGS MANAGEMENT	11%	9%	46%	32%	2%
Epilogue	STREAMLINING AND EFFICIENCIES	10% 1	11%	39%	39%	2%
	BESPOKE OR CUSTOMISED OFFERS	9% 1	12%	33%	42%	4%
Glossary	FLEXIBLE PARTNERSHIP	5% 18	8%	17%	58%	2%

When asked to rate their levels of satisfaction with their current FM service providers or contractors, respondents to the survey were completely satisfied to mostly satisfied in all key areas with Technical Expertise, B-BBEE, Time Management and Quality of Staff or Expertise receiving the most highest ratings.



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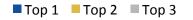
FM growth and service lines

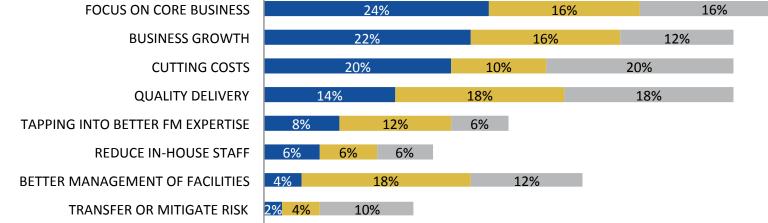
Vertical industry growth

Vertical industry requirements	FOCUS ON CORE BUSINESS	
Service provider criteria	BUSINESS GROWTH	
	CUTTING COSTS	
Tenders and proposals		
· · · · · I · I · · · · · ·	QUALITY DELIVERY	
Budget ranges and cycles	TAPPING INTO BETTER FM EXPERTISE	89
E 1	REDUCE IN-HOUSE STAFF	6%
Epilogue	BETTER MANAGEMENT OF FACILITIES	4%
Glossary	TRANSFER OR MITIGATE RISK	<mark>2%</mark> 49
		-

# FM SERVICE PROVIDER REQUIREMENTS

## WHAT ARE/WOULD BE THE BUSINESS AND STRATEGIC DRIVERS FOR **OUTSOURCING YOUR FM SERVICES?**





Business and strategic drivers for end-users and clients to outsource their FM services include enabling them to focus on their core business, fostering business growth, cutting costs, enabling quality delivery of FM services and tapping into better FM expertise provided by outsourced service providers or contractors.



About the research

Executive summary

Overall FM market share

Very Important Somewhat Important FM growth and service lines Neutral Important Not Important Vertical industry growth 0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100% 5% 2% QUALITY CONTROL 63% 30% Vertical industry requirements 11% FINANCIAL MANAGEMENT 63% 1% 25% Service provider criteria CLIENT SERVICE 62% 9% 29% Tenders and proposals 58% 4% PEOPLE MANAGEMENT 38% Budget ranges and cycles PROJECT MANAGEMENT 52% 11% 37% 51% 11% 38% INFORMATION MANAGEMENT 48% 11% 40% PROCUREMENT

FM SERVICE PROVIDER REQUIREMENTS

Quality Control, Financial Management and great Client Service are the top 3 most important attributes that end-users and clients look for in their FM service providers and contractors.

HOW IMPORTANT ARE THE FOLLOWING ATTRIBUTES TO THE MANAGEMENT OF YOUR FACILITIES?



Epilogue

Glossary

About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

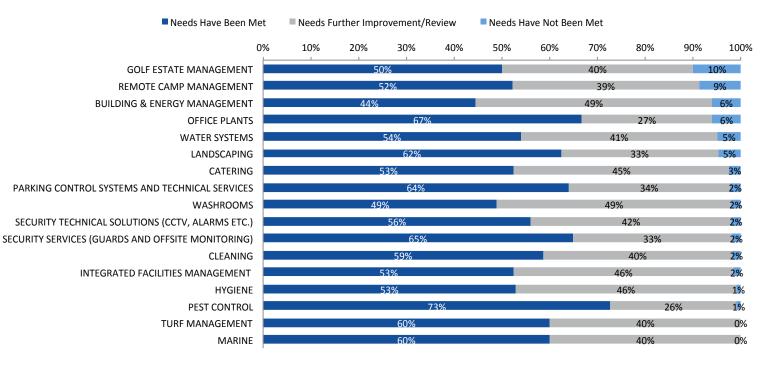
Epilogue

Glossary

## FM SERVICE PROVIDER REQUIREMENTS

End-users or clients interviewed for the survey indicated that their needs are mostly being met (scoring over 60%) with Pest Control Services, Office Plants, Security Services, Parking Control Systems, Landscaping, Turf Management and Marine Transport Solutions. 10% of respondents for Golf Estates indicated that their needs have not been met, while 9% of end-users of remote camps also 'red flagged' these services.

### PLEASE CONFIRM IF YOUR ORGANISATION'S FM OUTSOURCED SERVICE REQUIREMENTS HAVE BEEN MET OR NEED FURTHER IMPROVEMENT?



### About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

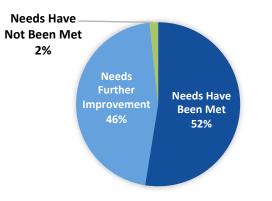
Budget ranges and cycles

Epilogue

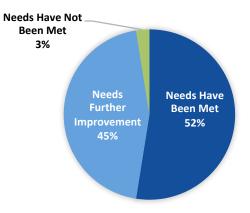
Glossary

## | FM SERVICE PROVIDER REQUIREMENTS

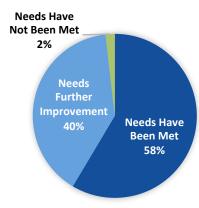
### **INTEGRATED FACILITIES MANAGEMENT**



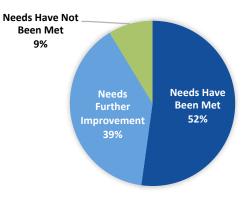
CATERING



**CLEANING SERVICES** 



### **REMOTE CAMP MANAGEMENT**





### About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

# FM SERVICE PROVIDER REQUIREMENTS

Needs

Further

Improvement

Needs

Further

Improvement

Needs Have Not

Been Met

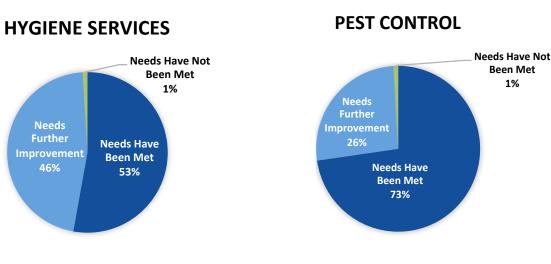
2%

**WASHROOMS** 

**Needs Have** 

Been Met

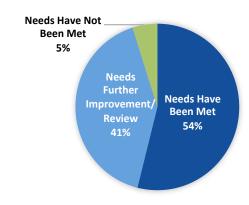
49%



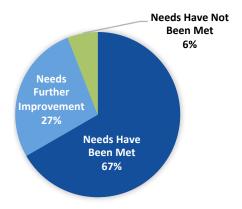
WATER SYSTEMS

Been Met

1%



## **OFFICE PLANTS**





### About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

# **FM SERVICE PROVIDER REQUIREMENTS**

GOLF AND TURF MANAGEMENT

**Needs Have** 

Been Met

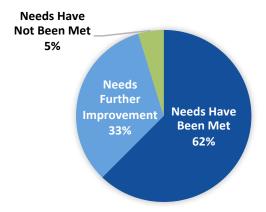
55%

Needs

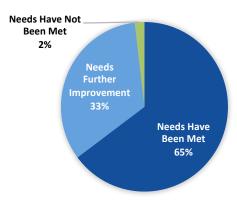
Further

Improvement

### LANDSCAPING



**SECURITY SERVICES** 





84

About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

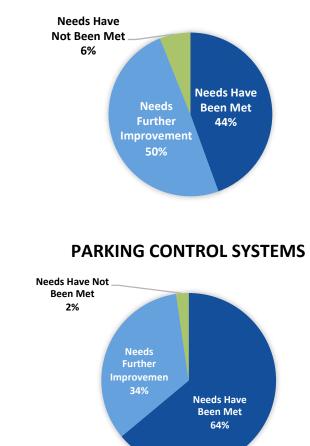
Budget ranges and cycles

Epilogue

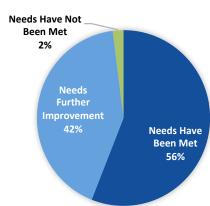
Glossary

# **FM SERVICE PROVIDER REQUIREMENTS**

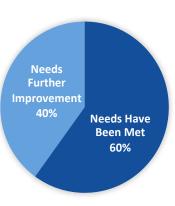
### **BUILDING MANAGEMENT SYSTEMS & ENERGY SOLUTIONS**



### SECURITY TECHNICAL SOLUTIONS



### MARINE TRANSPORT SOLUTIONS





About the research

Executive summary

# **FM SERVICE PROVIDER REQUIREMENTS**

### **INTEGRATED FACILITIES MANAGEMENT**

Top 1 Top 2 Top 3 Overall FM market share COST SAVINGS 15% PROCESS IMPROVEMENT 6% FM growth and service lines **INDUSTRY EXPERIENCE & SKILLS** CERTIFIED STAFF AND PROFESSIONALS 10% 3% Vertical industry growth FLEXIBLE PARTNERSHIP APPROACH 6% METRICS FOR QUALITY ASSURANCE 5% 11% 13% INNOVATION & BEST PRACTICE Vertical industry requirements ACCESS TO THE LATEST TECHNOLOGY 3% SPECIALISATION IN YOUR SERVICE OR PRODUCT LINES 4% 9% Service provider criteria 5% 3% RELATIONSHIP BUILDING 4% AUTOMATION OF SERVICES (E.G. ROBOTICS) 4% 7% 4% Tenders and proposals 3% 4% 2% EVIDENCE OF SUCCESS IN PREVIOUS DEPLOYMENTS 3%1% 6% TAILORED COMMERCIAL MODELS 3% 3% ESTABLISHED INFRASTRUCTURE Budget ranges and cycles AFRICA FOOTPRINT OR NEAR SHORE DELIVERY 2%1% VERTICAL-SPECIFIC EXPERTISE 3% 1%

Epilogue

Glossary

## What criteria do you look for in your service provider(s)?

It's no surprise that most end-users and clients are looking for cost savings, or better financial management, across their FM services and this is the number one criteria that they look for in a service provider (this was also a key findings in the 2017 Facilities Management South Africa Report published by Knowledge Executive). For Integrated Facilities Management, process improvement, industry experience and skills, certified staff and professionals along with innovation and best practice are other key criteria that end-users and clients look for.



#### REMOTE CAMP MANAGEMENT

Top 1 Top 2 Top 3



CATERING

	■ Тор	1 Top 2	Тор 3		
Fenders and proposals	CERTIFIED STAFF AND PROFESSIONALS	13%		14%	8%
	METRICS FOR QUALITY ASSURANCE	9%	10%		13%
Budget ranges and cycles	PROCESS IMPROVEMENT	9%	13%		10%
5 5 7	RELATIONSHIP BUILDING	8%	9%	9%	
	INNOVATION & BEST PRACTICE	6%	8%	13%	
Epilogue	INDUSTRY EXPERIENCE & SKILLS	5%	11%	10%	
	TAILORED COMMERCIAL MODELS	5% 4%	8%		
Glossary	AUTOMATION OF SERVICES (E.G. ROBOTICS)	4% 3% 1%			
-	FLEXIBLE PARTNERSHIP APPROACH	3% 6%	5%		
	SPECIALISATION IN YOUR SERVICE OR PRODUCT LINES	3% 5%	5%		
	ESTABLISHED INFRASTRUCTURE	<mark>1%</mark> 1%			
	VERTICAL-SPECIFIC EXPERTISE	1% 4%			
	EVIDENCE OF SUCCESS IN PREVIOUS DEPLOYMENTS	<b>1%</b> 3%			
	AFRICA FOOTPRINT OR NEAR SHORE DELIVERY	1% 1%			
	COST SAVINGS	9%	13%		
	ACCESS TO THE LATEST TECHNOLOGY	3% 1%			

## What criteria do you look for in your service provider(s)?

Both the Catering industry and endusers that utilise remote camp management services require that their service providers have the right certified staff and professional resources, along with metrics for quality assurance and process improvement. Cost savings is a standout criteria for Camp Management.



Service provider criteria

About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

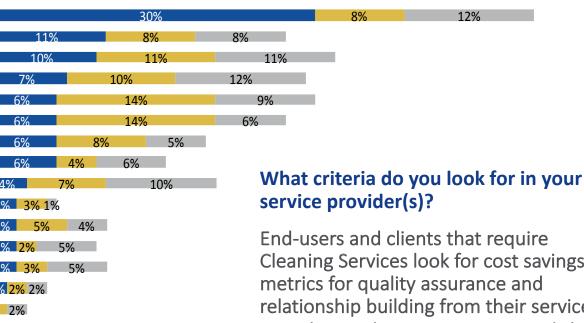
Glossary

# **FM SERVICE PROVIDER REQUIREMENTS**

#### COST SAVINGS 30% METRICS FOR QUALITY ASSURANCE 8% **RELATIONSHIP BUILDING** 10% 11% **INDUSTRY EXPERIENCE & SKILLS** 7% 10% CERTIFIED STAFF AND PROFESSIONALS 6% 14% PROCESS IMPROVEMENT 6% 14% FLEXIBLE PARTNERSHIP APPROACH 6% TAILORED COMMERCIAL MODELS 6% 4% **INNOVATION & BEST PRACTICE** 4% 7% 3% 3% 1% ESTABLISHED INFRASTRUCTURE 4% ACCESS TO THE LATEST TECHNOLOGY 3% 5% AUTOMATION OF SERVICES (E.G. ROBOTICS) 3% 2% 5% 3% 3% 5% SPECIALISATION IN YOUR SERVICE OR PRODUCT LINES 2% 2% 2% EVIDENCE OF SUCCESS IN PREVIOUS DEPLOYMENTS 2% VERTICAL-SPECIFIC EXPERTISE AFRICA FOOTPRINT OR NEAR SHORE DELIVERY 1918

## CLEANING

■ Top 1 ■ Top 2 ■ Top 3



Cleaning Services look for cost savings, metrics for quality assurance and relationship building from their service providers. Industry experience and skills, certified staff and professionals and process improvement are also key criteria that they look for.

88



About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

# FM SERVICE PROVIDER REQUIREMENTS

What criteria do you

Besides the principal

criteria of cost savings

and certified staff and

services also look for

technology, metrics for

quality assurance with

innovation, best practice

access to the latest

and Pest Control

and process

improvements.

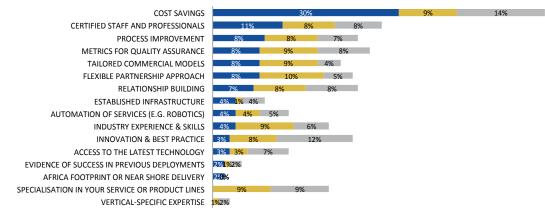
professionals, end-users and clients of Hygiene

provider(s)?

look for in your service

### HYGIENE

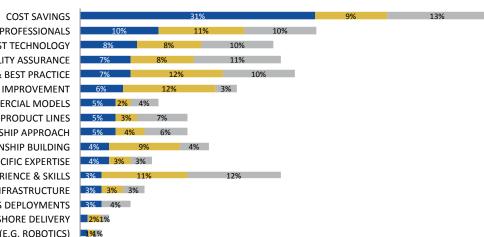
■Top 1 ■Top 2 ■Top 3



### PEST CONTROL

Top 1 Top 2 Top 3

COST SAVINGS CERTIFIED STAFF AND PROFESSIONALS ACCESS TO THE LATEST TECHNOLOGY METRICS FOR QUALITY ASSURANCE INNOVATION & BEST PRACTICE PROCESS IMPROVEMENT TAILORED COMMERCIAL MODELS SPECIALISATION IN YOUR SERVICE OR PRODUCT LINES FLEXIBLE PARTNERSHIP APPROACH RELATIONSHIP BUILDING VERTICAL-SPECIFIC EXPERTISE INDUSTRY EXPERIENCE & SKILLS ESTABLISHED INFRASTRUCTURE EVIDENCE OF SUCCESS IN PREVIOUS DEPLOYMENTS AFRICA FOOTPRINT OR NEAR SHORE DELIVERY AUTOMATION OF SERVICES (E.G. ROBOTICS)





About the research

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

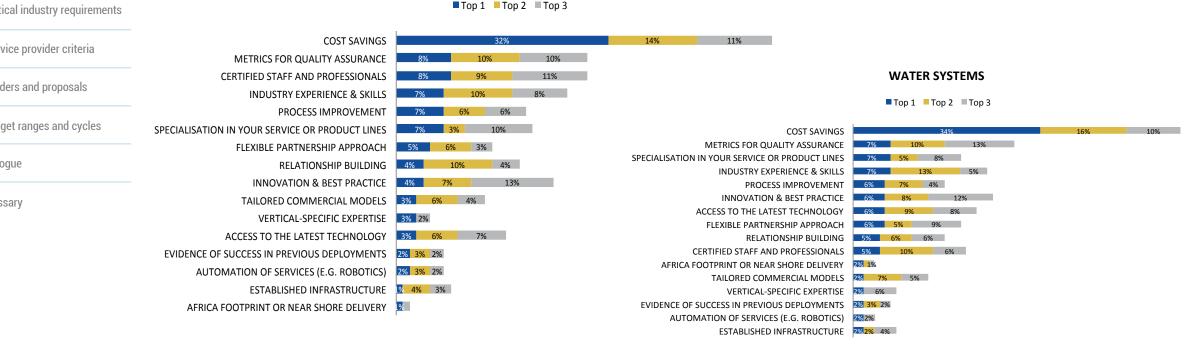
Glossary

# **FM SERVICE PROVIDER REQUIREMENTS**

## What criteria do you look for in your service provider(s)?

**WASHROOMS** 

End-users of Washrooms and Water Systems also look for specialisation in these service or product lines in addition to cost savings, metrics for quality assurance and certified staff, professionals, industry experience and skills.



2018-2019 Facilities Management Market Analysis Survey: South Africa

90



About the research

Executive summary

Overall FM market share

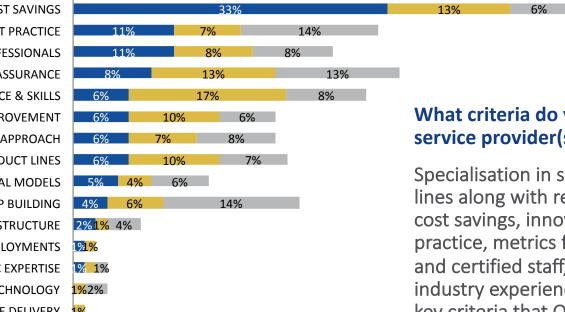
FM growth and service lines

Vertical industry growth	COST SAVINGS	
	<b>INNOVATION &amp; BEST PRACTICE</b>	
Vertical industry requirements	CERTIFIED STAFF AND PROFESSIONALS	
	METRICS FOR QUALITY ASSURANCE	
Service provider criteria	INDUSTRY EXPERIENCE & SKILLS	
	PROCESS IMPROVEMENT	
Tenders and proposals	FLEXIBLE PARTNERSHIP APPROACH	
Budget ranges and cycles	SPECIALISATION IN YOUR SERVICE OR PRODUCT LINES	
	TAILORED COMMERCIAL MODELS	5
Epilogue	RELATIONSHIP BUILDING	49
	ESTABLISHED INFRASTRUCTURE	2%
Glossary	EVIDENCE OF SUCCESS IN PREVIOUS DEPLOYMENTS	1%19
	VERTICAL-SPECIFIC EXPERTISE	1%
	ACCESS TO THE LATEST TECHNOLOGY	<mark>1%</mark> 2
	AFRICA FOOTPRINT OR NEAR SHORE DELIVERY	1%

## **OFFICE PLANTS**

FM SERVICE PROVIDER REQUIREMENTS

Top 1 Top 2 Top 3



## What criteria do you look for in your service provider(s)?

Specialisation in service or product lines along with relationship building, cost savings, innovation and best practice, metrics for quality assurance and certified staff, professionals, industry experience and skills are the key criteria that Office Plant suppliers should meet for their clients.



Editors	Note
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Executive summar	y
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Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements	COST SAVINGS	
	METRICS FOR QUALITY ASSURANCE	11%
Service provider criteria	FLEXIBLE PARTNERSHIP APPROACH	9%
	SPECIALISATION IN YOUR SERVICE OR PRODUCT LINES	7% 4%
Tenders and proposals	CERTIFIED STAFF AND PROFESSIONALS	7%
	PROCESS IMPROVEMENT	6%
Budget ranges and cycles	INDUSTRY EXPERIENCE & SKILLS	5%
	RELATIONSHIP BUILDING	5% 1
Epilogue	TAILORED COMMERCIAL MODELS	5% 2% 1%
-phogue	INNOVATION & BEST PRACTICE	5% 1
Glossary	ACCESS TO THE LATEST TECHNOLOGY	2% 8%
Glossery	EVIDENCE OF SUCCESS IN PREVIOUS DEPLOYMENTS	<b>2% 1%</b> 5%
	AFRICA FOOTPRINT OR NEAR SHORE DELIVERY	1%1%1%
	AUTOMATION OF SERVICES (E.G. ROBOTICS)	1% 2%
	ESTABLISHED INFRASTRUCTURE	1 <mark>% 2%</mark> 2%
	VERTICAL-SPECIFIC EXPERTISE	<mark>1%</mark> 4%

# **FM SERVICE PROVIDER REQUIREMENTS**

## LANDSCAPING

■ Top 1 ■ Top 2 ■ Top 3

ΞS				33%			8%	7%
CE	11	1%		14%		13%		
ЭН	9%	6 2	.%	8%				
ES	7%	4%	9	%				
LS	7%		12%		9%			
١T	6%	ç	1%	4%				
LS	5%	1	2%		12%			
IG	5%	11	%		11%			
LS	5%	<mark>2%</mark> 1%						
CE	5%	11	%	6%				
SΥ	2%	8%	6%					
TS	2% <mark>1%</mark>	5%						
RY	<mark>1%1%</mark> 1%							
S)	1% 2%							
RE	1 <mark>% 2%</mark> 2%	0						
SE	1% 4%							

## What criteria do you look for in your service provider(s)?

When facilitating Landscaping services, FM service providers and contractors should also be cognizant of cost savings and quality assurance, ensuring that they have certified staff with the requisite industry skills and expertise while also offering innovation and best practice.



#### Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

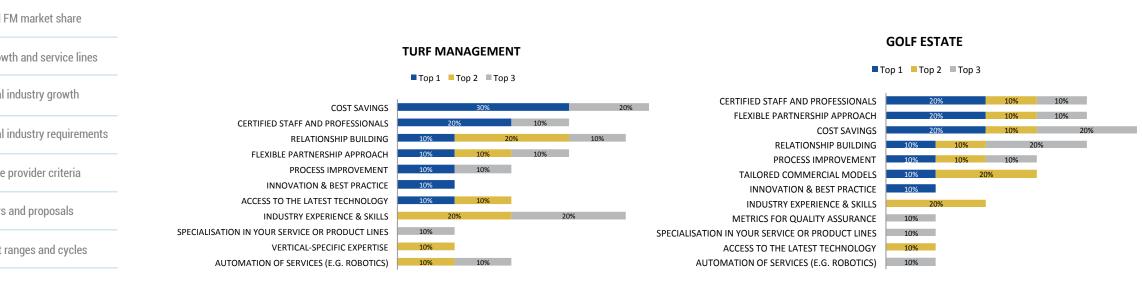
Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

# FM SERVICE PROVIDER REQUIREMENTS



What criteria do you look for in your service provider(s)?

Golf estates and office parks and organisations that require Turf Management look for cost savings along with certified professionals, process improvements and relationship building with flexible partnerships.



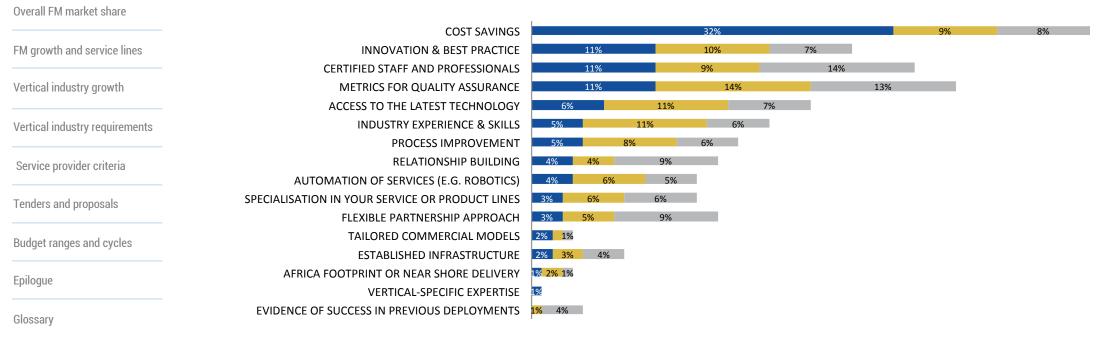
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### Executive summary

# **FM SERVICE PROVIDER REQUIREMENTS**

### **SECURITY SERVICES**

Top 1 Top 2 Top 3



## What criteria do you look for in your service provider(s)?

When deploying Security Services and with that guards, surveillance and monitoring services, end-users and clients require that these service providers provide quality assurance, qualified guards and professionals along with innovation, best practice and access to the latest security technology.



# **FM SERVICE PROVIDER REQUIREMENTS**

### PARKING CONTROL SYSTEMS

Top 1 Top 2 Top 3



Tenders and proposals

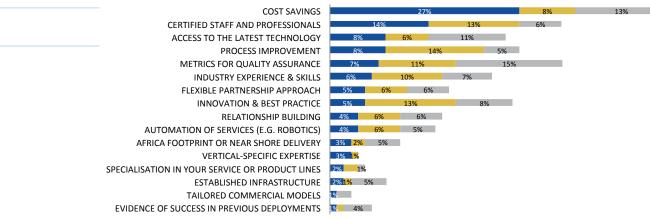
Budget ranges and cycles

Epilogue

Glossary

SECURITY TECHNICAL	SOLUTIONS
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■ Top 1 ■ Top 2 ■ Top 3



## What criteria do you look for in your service provider(s)?

Requiring cutting-edge technical services and support, it is no surprise that end-users of Security Technical Solutions and Parking Control Systems look for certified staff and professionals and access to the latest technology. Of interest is that automation of services (such as robotics) is also a key requirement.



About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

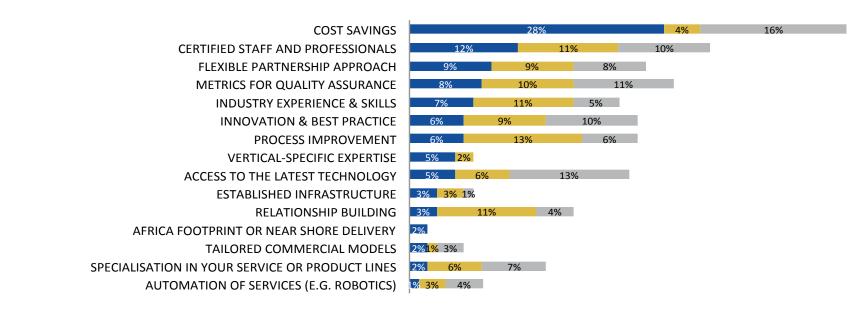
Glossary

# **FM SERVICE PROVIDER REQUIREMENTS**

## What criteria do you look for in your service provider(s)?

Facilities managers of office parks and buildings that outsource Building Management Systems & Energy Solutions look for cost savings, certified staff, quality assurance, process improvements and flexible partnership approaches that deliver innovation and best practice.

### **BUILDING MANAGEMENT SYSTEMS & ENERGY SOLUTIONS**



Top 1 Top 2 Top 3



<b>FM SERVICE PROVIDER RED</b>	IUIREMEN	ITS		
MAR	RINE TRANSPO	RT SOLUTIONS		
AUTOMATION OF SERVICES (E.G. ROBOTICS)	20%			
COST SAVINGS	20%	4(	)%	20%
PROCESS IMPROVEMENT	20%	20%		
RELATIONSHIP BUILDING	20%	20%		
ACCESS TO THE LATEST TECHNOLOGY	20%	20%		
INDUSTRY EXPERIENCE & SKILLS	20%			
METRICS FOR QUALITY ASSURANCE	20%	I		
INNOVATION & BEST PRACTICE	20%	20%	l	
	AUTOMATION OF SERVICES (E.G. ROBOTICS) COST SAVINGS PROCESS IMPROVEMENT RELATIONSHIP BUILDING ACCESS TO THE LATEST TECHNOLOGY INDUSTRY EXPERIENCE & SKILLS METRICS FOR QUALITY ASSURANCE	Top 1 AUTOMATION OF SERVICES (E.G. ROBOTICS) COST SAVINGS PROCESS IMPROVEMENT RELATIONSHIP BUILDING ACCESS TO THE LATEST TECHNOLOGY INDUSTRY EXPERIENCE & SKILLS METRICS FOR QUALITY ASSURANCE	Top 1Top 2Top 3AUTOMATION OF SERVICES (E.G. ROBOTICS)20%COST SAVINGS20%PROCESS IMPROVEMENT20%RELATIONSHIP BUILDING20%ACCESS TO THE LATEST TECHNOLOGY20%INDUSTRY EXPERIENCE & SKILLS20%METRICS FOR QUALITY ASSURANCE20%	MARINE TRANSPORT SOLUTIONS         • Top 1 • Top 2 • Top 3         AUTOMATION OF SERVICES (E.G. ROBOTICS)         COST SAVINGS         PROCESS IMPROVEMENT         RELATIONSHIP BUILDING         ACCESS TO THE LATEST TECHNOLOGY         INDUSTRY EXPERIENCE & SKILLS         METRICS FOR QUALITY ASSURANCE

Glossary

## What criteria do you look for in your service provider(s)?

Organisations that utilise marine transport solutions were more specific in the criteria they look for in their service providers which includes cost savings, process improvement and access to the latest technology along with automation innovations and best practice.



About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

# TENDERS & PROPOSALS







Editors	h I - t -
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Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

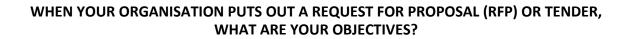
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# TENDERS & PROPOSALS



Selected Not Selected

Service provider criteria		
	ENSURE THERE IS A FAIR PROCUREMENT PROCESS	98%
enders and proposals	FOLLOW DUE PROCESS	95%
udget ranges and cycles	BENCHMARK SERVICES BETWEEN SUPPLIERS	91%
	REMAIN COMPLIANT BY RETENDERING AS SERVICE PROVIDER CONTRACTS END	90%
pilogue	BENCHMARK PRICING BETWEEN SUPPLIERS	88%
lossary	RESCOPING FM REQUIREMENTS IN LINE WITH GLOBAL TRENDS	85%
	SEE WHAT NEW TECHNOLOGY AND INNOVATIONS ARE OUT THERE	85%
	KEEP THE SAME FM SERVICE PROVIDER BUT TENDER TO FOLLOW DUE PROCESS	79%
		I contraction of the second

FM service providers and contractors often get asked to provide requests for proposals (RFPs) or to participate in tenders. Respondents to the survey were asked what are their objectives for RFPs and tenders. Ensuring there is a fair procurement process and following due process were the top objectives, however it seems that many end-users and clients also ask for RFPs to benchmark services or pricing between suppliers or to see what new technology and innovations are out there. Some end-users and clients keep the same FM service provider but tender their services just to follow due process.



# **TENDERS & PROPOSALS**

About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry	requirements
-------------------	--------------

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

## WHO IN YOUR ORGANISATION ARE THE DECISION MAKERS WITH REGARDS TO TENDERS AND TENDER FULFILMENT?



The following decision makers normally make up the tender team:

- 1. CEO or Managing Director, with
- 2. Internal FM Management Team, and
- 3. Head of FM Service, along with the
- 4. Procurement Team.

CFOs, Finance Directors and COOs are also instrumental in the tender fulfilment and awarding process.



# TENDERS & PROPOSALS

About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

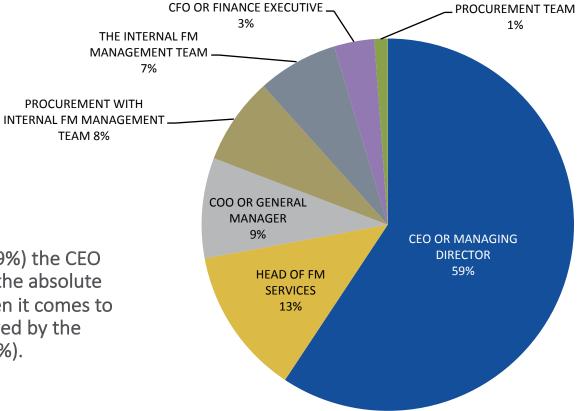
Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

In most organisations (59%) the CEO or Managing Director is the absolute final decision maker when it comes to awarding tenders, followed by the Head of FM Services (13%).



### WHO IS THE ABSOLUTE FINAL DECISION MAKER?



About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

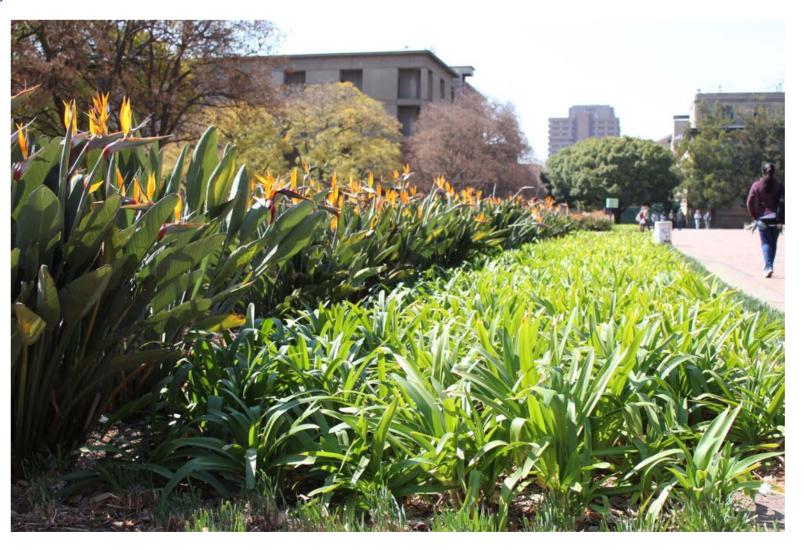
Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

# **FM BUDGET RANGES & CYCLES**







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Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

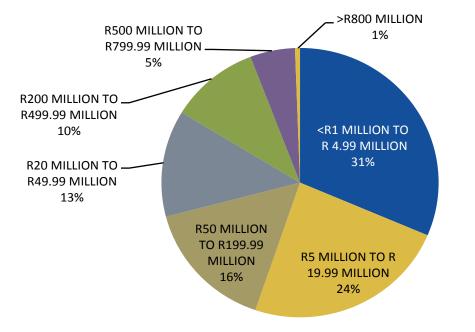
Budget ranges and cycles

Epilogue

Glossary

# FM BUDGET RANGES & CYCLES





## **Operational Budgets**

Total operational FM budgets for the past 12 months ranged from R1 million to R800 million, with most budgets ranging from R1 million to 19.99 million (59.99%).

At the upper end, FM budgets range from R200 million to R800 million (16%).



# **FM BUDGET RANGES & CYCLES**

Executive summary

About the research

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

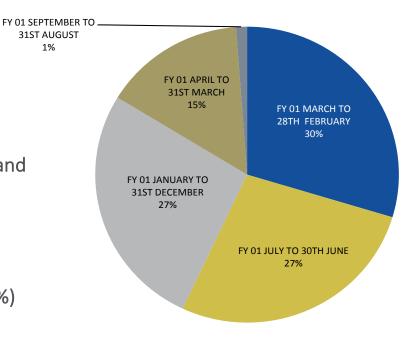
Glossary

### **Financial Years**

Financial Years sit in 4 main periods and timelines:

- 1. 01 March 28<sup>th</sup> February (30%)
- 2. 01 July 30<sup>th</sup> June (27%)
- 3. 01 January 31<sup>st</sup> December (27%)
- 4. 01 April to 31<sup>st</sup> March (15%)

### WHEN DOES YOUR FINANCIAL YEAR RUN?



About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

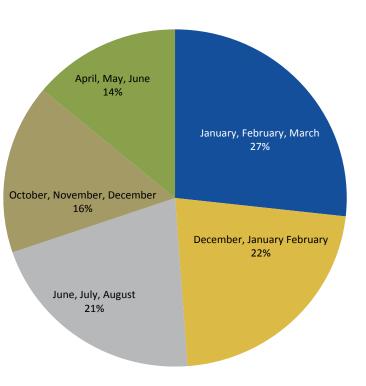
Budget ranges and cycles

Epilogue

Glossary

# FM BUDGET RANGES & CYCLES

### WHEN DOES YOUR FM BUDGET CYCLE RUN EACH YEAR?



## **Budget Cycles**

FM Budget Cycles (when FM managers plan their annual budgets) sit mainly equally in 3 categories or cycles :

- 1. January, February, March (27%)
- 2. December, January February (22%)
- 3. June, July August (21%)





Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary



The general consensus, based on this market analysis survey, is that while the South African FM sector will experience definitive growth over the next 12 months - with a side-by-side increase in outsourced services - budget constraints, vertical industry regulations and organisational silos will continue to present challenges.

End-users and clients will want to optimise their FM budgets, get good value for the money they spend and work more smartly by deploying cutting-edge technology and innovative processes. They will expect their service providers to specialise and provide them with the best skills and expertise, enabling them to focus on the growth of their own businesses.

New and smarter ways of working that enable FM teams to be agile, productive and focused will be adopted. Automation will become a game changer and will be utilised for repetitive and mundane tasks, empowering FM managers to become more strategic and focus on complex assignments.

Market forces and demands will prevail. Expect to see new, boutique service providers enter the market creating more competition for incumbents. In an effort to augment revenues and increase profitability, many of the larger FM service providers will look north and put in place policies to break into new African markets, or grow their existing market share in these territories. **It will be a transformative, and noteworthy, year ahead.** 



### About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

# **GLOSSARY/DEFINITIONS**

- B-BBEE Broad Based Black Economic Empowerment
- **FM** Facilities Management
- Integrated Facilities Management is when a number of FM services are delivered under a single management team or service provider.
- Parking Management Services includes advisory services, revenue collection and management of parking operations.
- Parking Control Systems includes bay monitoring, automated revenue systems and advanced smart solutions for parking areas.
- Security Services includes manned guarding, off-site monitoring and intervention services.
- Security Technical Solutions includes alarm, intruder detection, CCTV, remote control/access and biometric systems.



About the research

Executive summary

Overall FM market share

FM growth and service lines

Vertical industry growth

Vertical industry requirements

Service provider criteria

Tenders and proposals

Budget ranges and cycles

Epilogue

Glossary

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## 2018 – 2019 FACILITIES MANAGEMENT MARKET ANALYSIS SURVEY: South Africa



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