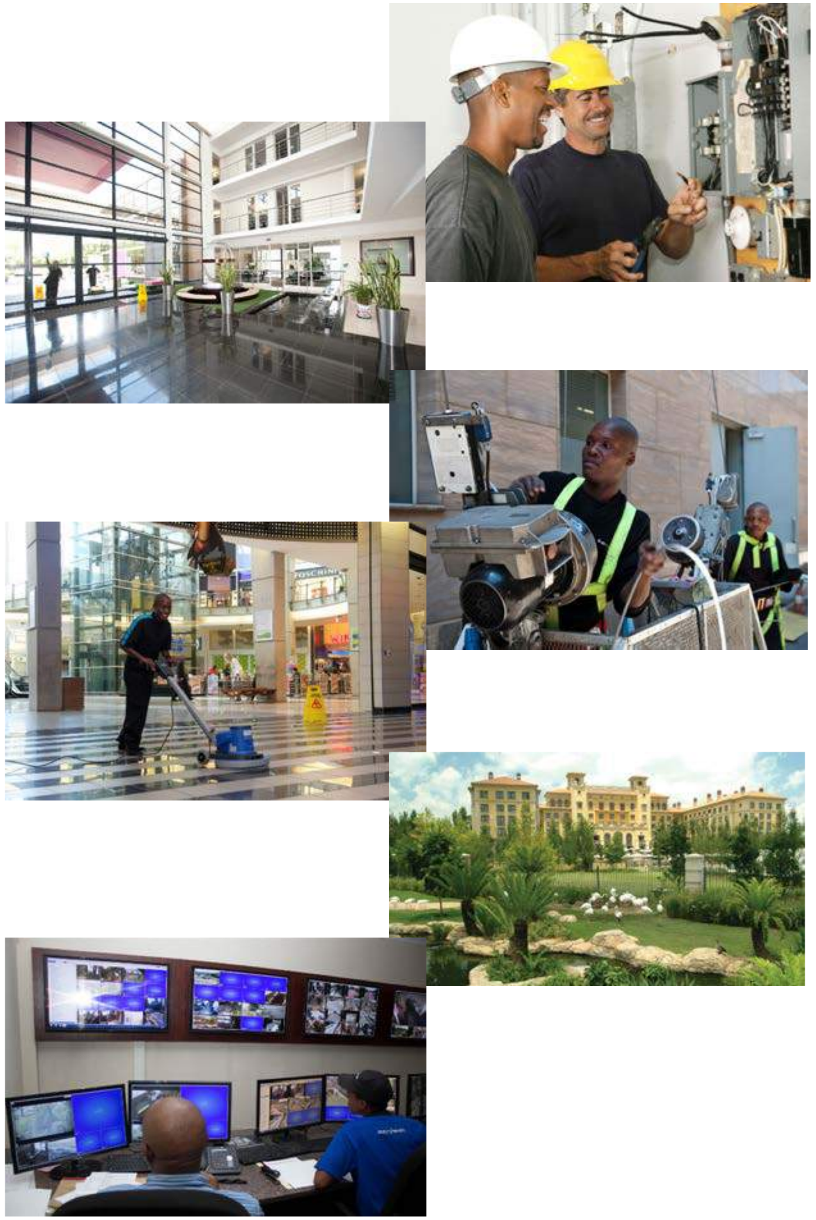
2018 – 2019 FACILITIES MANAGEMENT MARKET ANALYSIS SURVEY: SOUTH AFRICA

Knowledge Executive

CONTENTS



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[1] and hard services[2] 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

NOTE FROM THE EDITORS CONTINUED

[1]FM soft services include:

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

[2]FM hard services include:

- Air-Conditioning Systems
- Building Information Technology
- Building Maintenance and Repair
- Energy Management
- Parking Control Systems and Technical Services
- Security Technical Solutions & Systems
- Water Systems

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.

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

Disclaimer:
The information and data in this book was comprised with the utmost care, research and professionalism. However the authors, editors and partners and suppliers of this publication accept no responsibility, or are held liable for any incorrect or inconsistent information and data.

ABOUT THE SURVEY: METHODOLOGY & RESPONDENTS

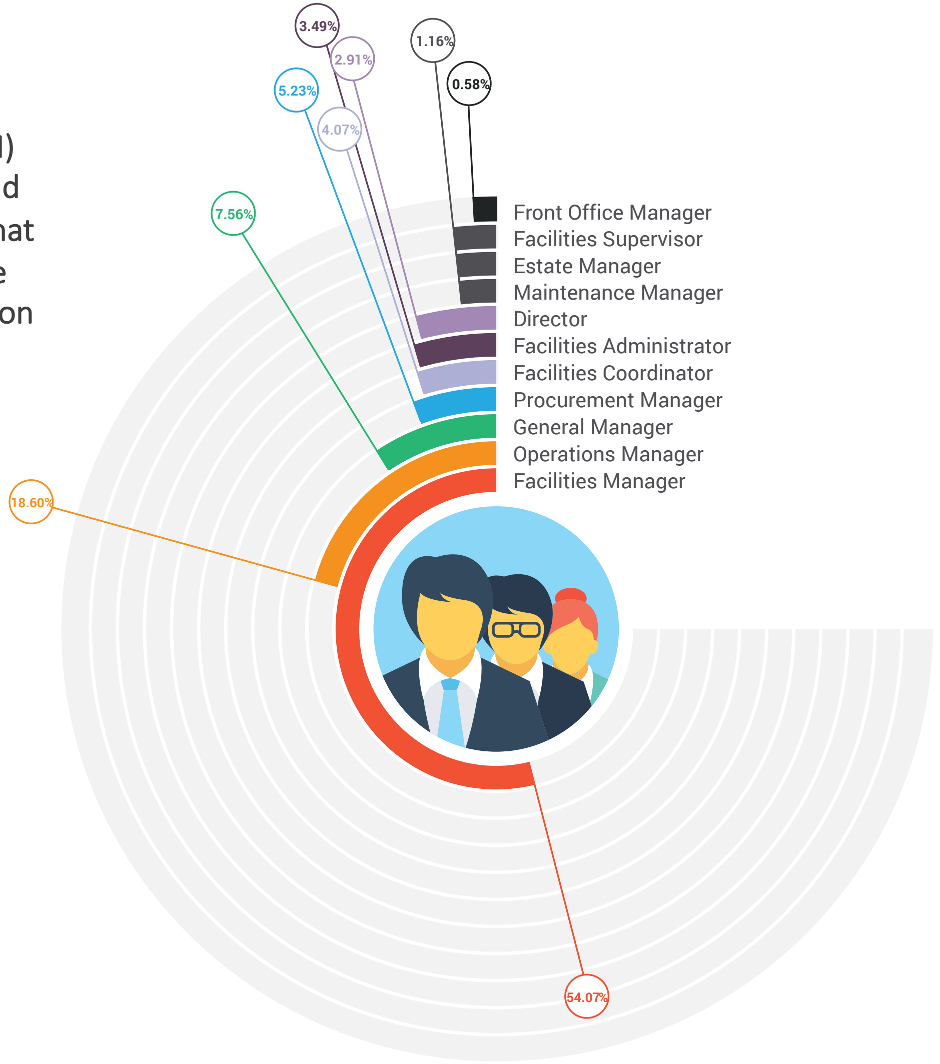
Knowledge Executive was commissioned to conduct the research by the Servest Group to provide an updated and impartial view of the Facilities Management (FM) services marketplace in South Africa. Facilities, operations and estate managers and directors were invited to participate in the survey through 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



ABOUT THE SURVEY: METHODOLOGY & RESPONDENTS

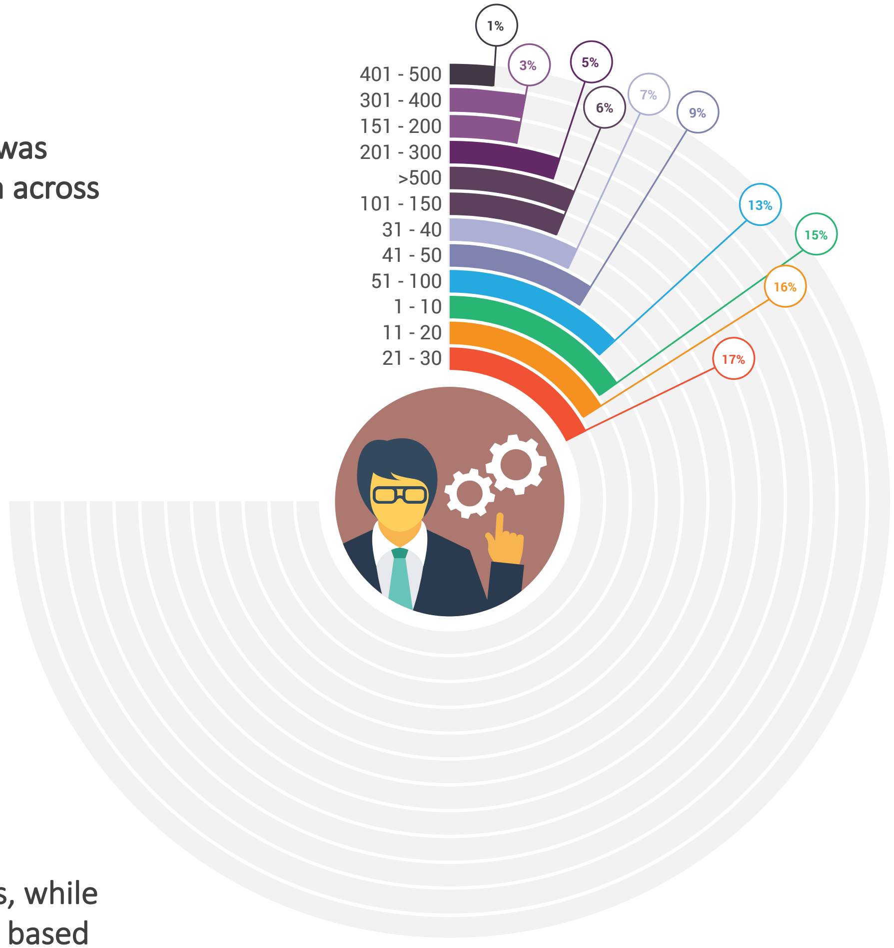
Supporting Qualitative Research

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 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:

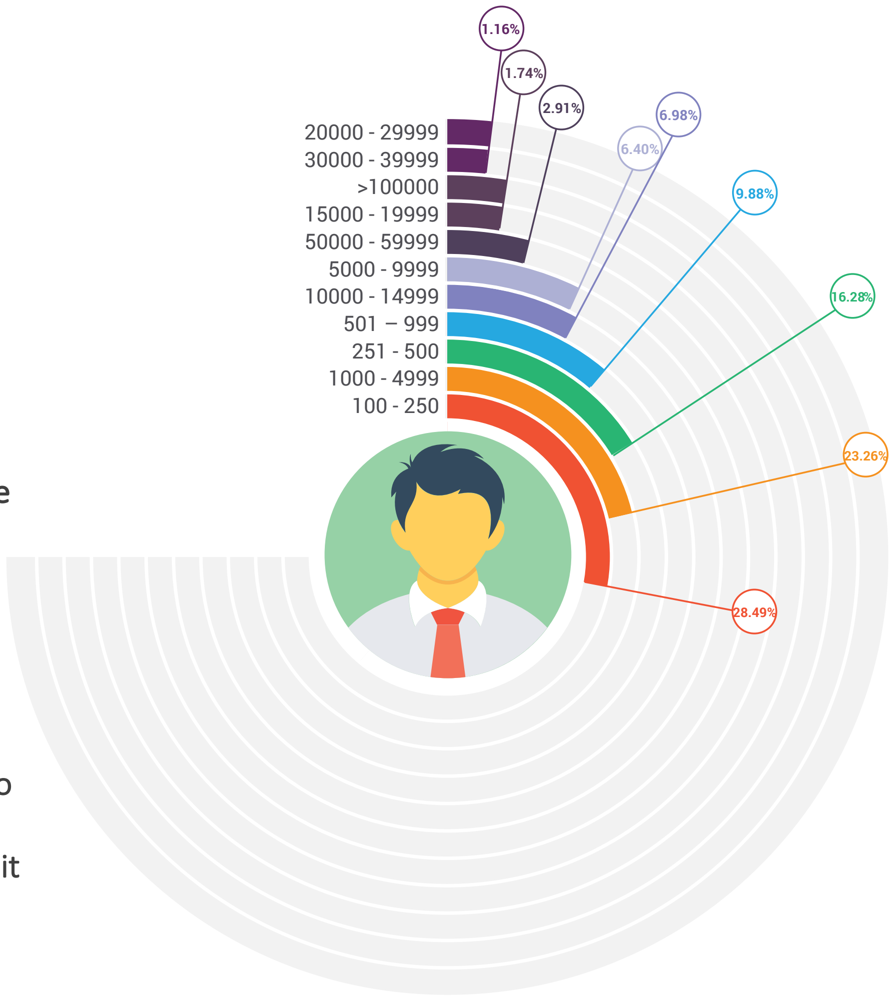
- Indication of overall market share for FM services in South Africa.
- Percentage insourced and percentage outsourced.
- End-user growth strategies and investment plans for FM services across 12 vertical/industry sectors.
- Outsourcing growth and service criteria for FM services across 17 core FM service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

Numbers Of Employees



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

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.

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.

FM MARKET SHARE

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.

FM MARKET SHARE

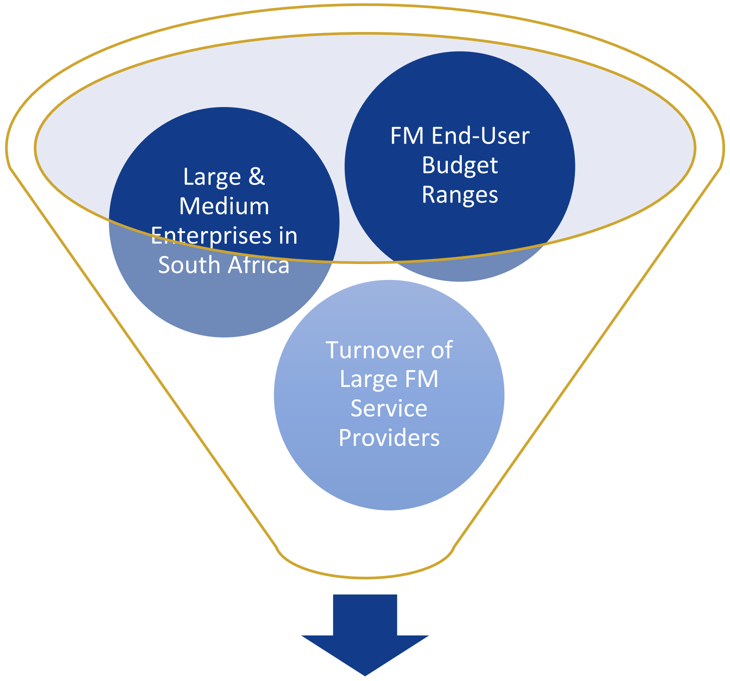
Determining the market size of the Facilities Management (FM) sector is quite challenging. This is an industry that is diverse as it is faceted, with many different players ranging from the large FM service providers, through to hundreds of small and medium sized contractors providing services such as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

FM MARKET SHARE

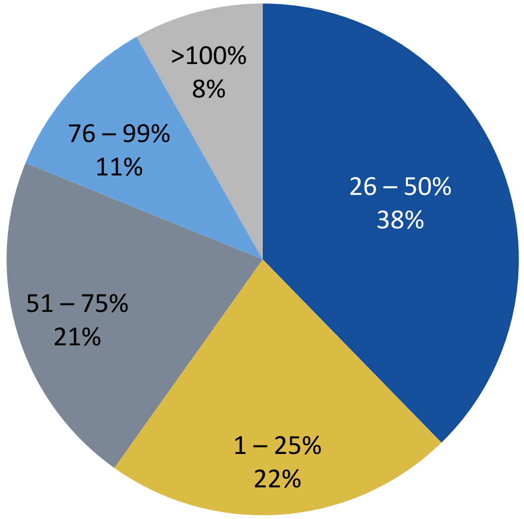
Insourced vs. Outsourced vs. Hybrid

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?



FM MARKET SHARE INDICATION: SERVICE LINES

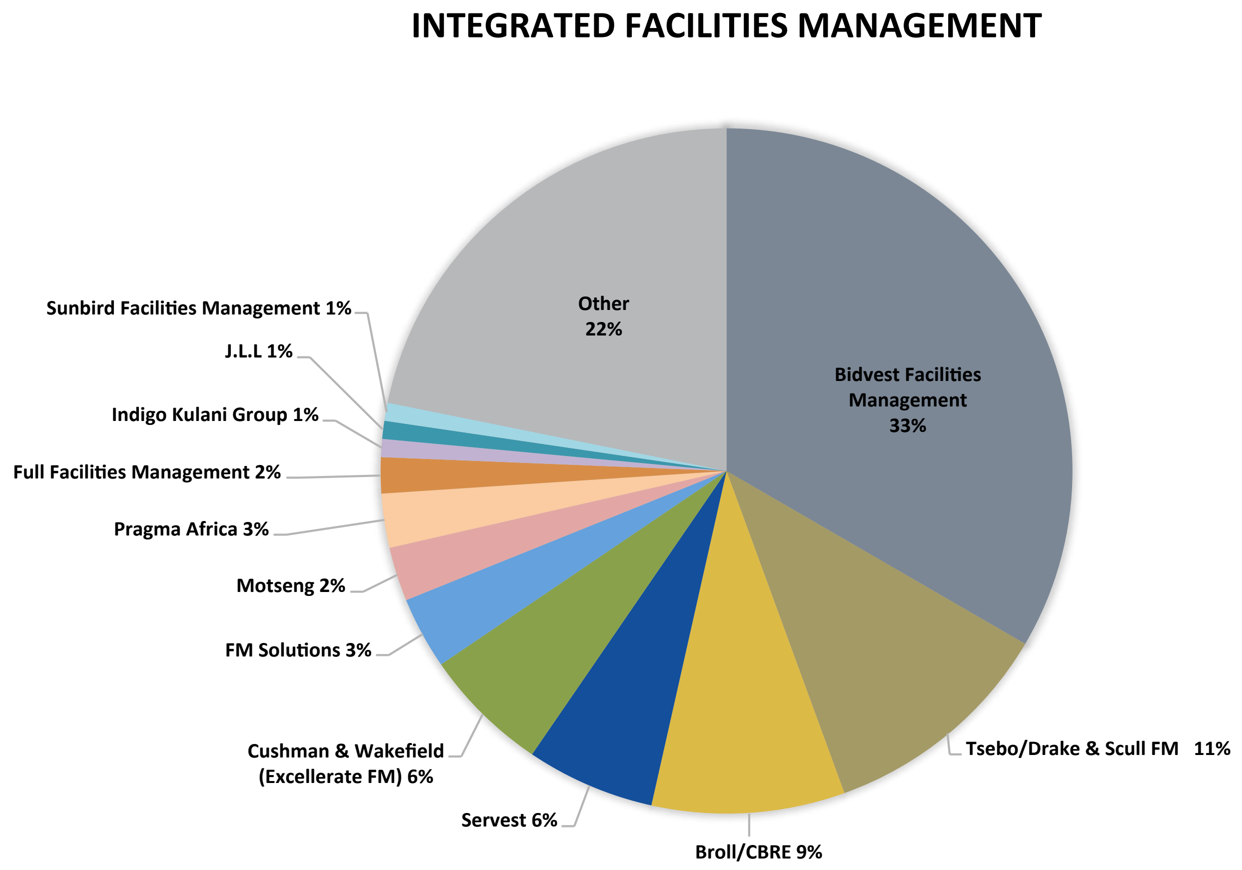
The following data sets, graphs and analyses give an indication of market share for key FM service lines. These findings are based on responses received to this survey as well as additional desktop and qualitative research conducted for this market analysis survey.

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 market share in Integrated Facilities Management are:

1. Bidvest (33%)
2. Tsebo (11%)
3. Broll/CBRE (9%)
4. Servest (6%)
5. Other (22%)

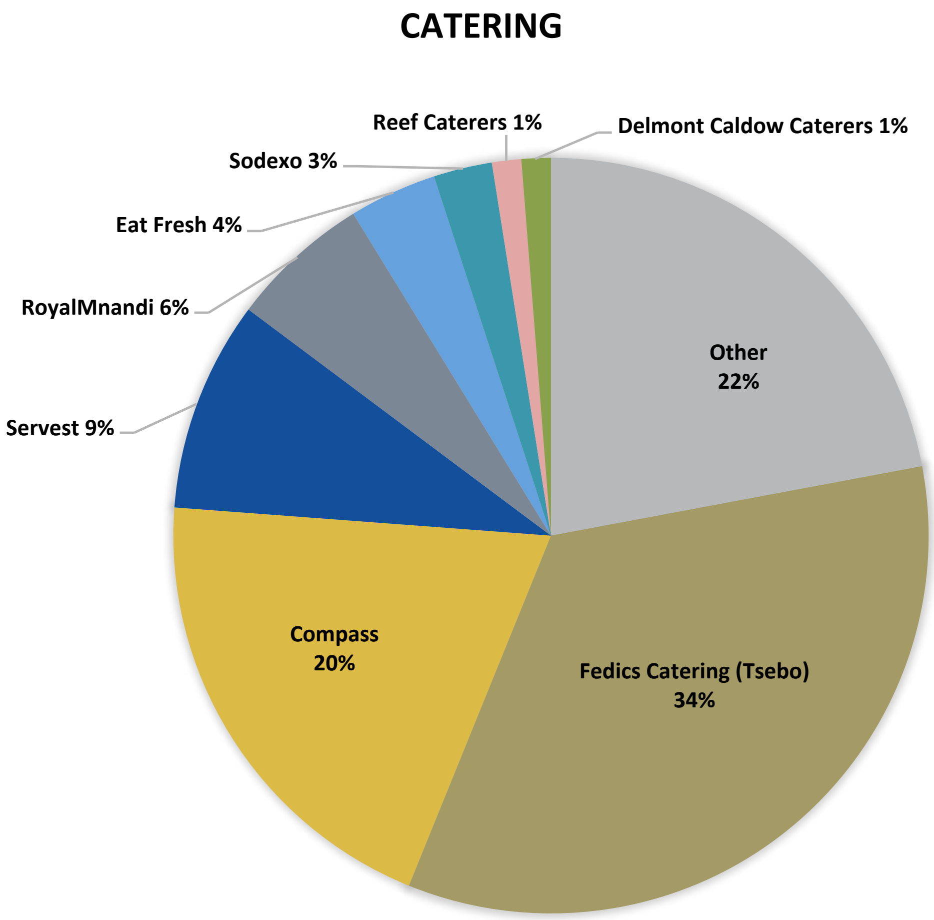


FM MARKET SHARE INDICATION: SERVICE LINES

Catering

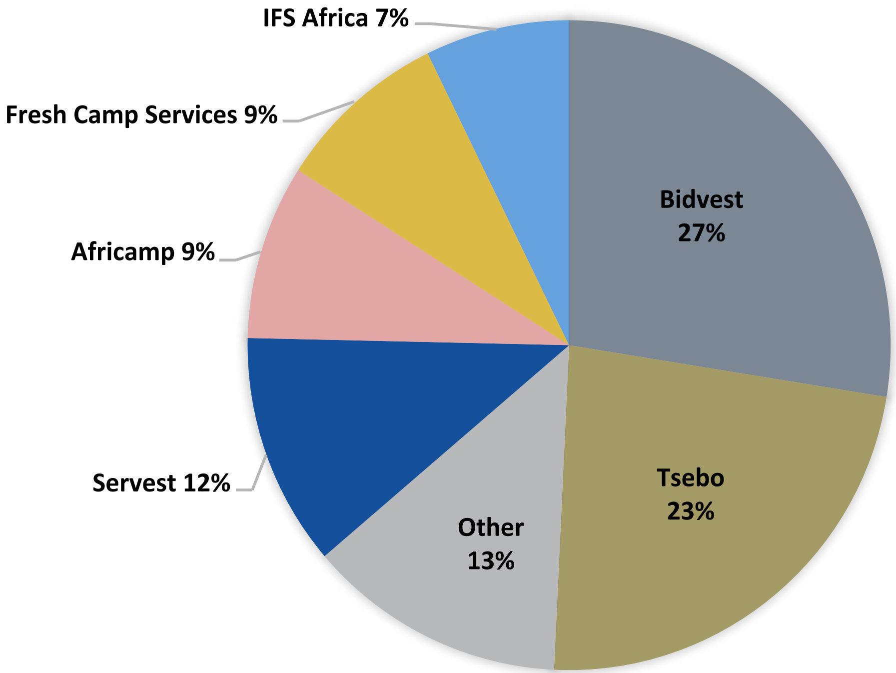
Market share in the Catering service line is as follows:

1. Fedics Catering Tsebo (38%)
2. Compass (20%)
3. Servest (9%)
4. Royal Mnandi (6%)
5. Other (18%)



FM MARKET SHARE INDICATION: SERVICE LINES

REMOTE CAMP MANAGEMENT

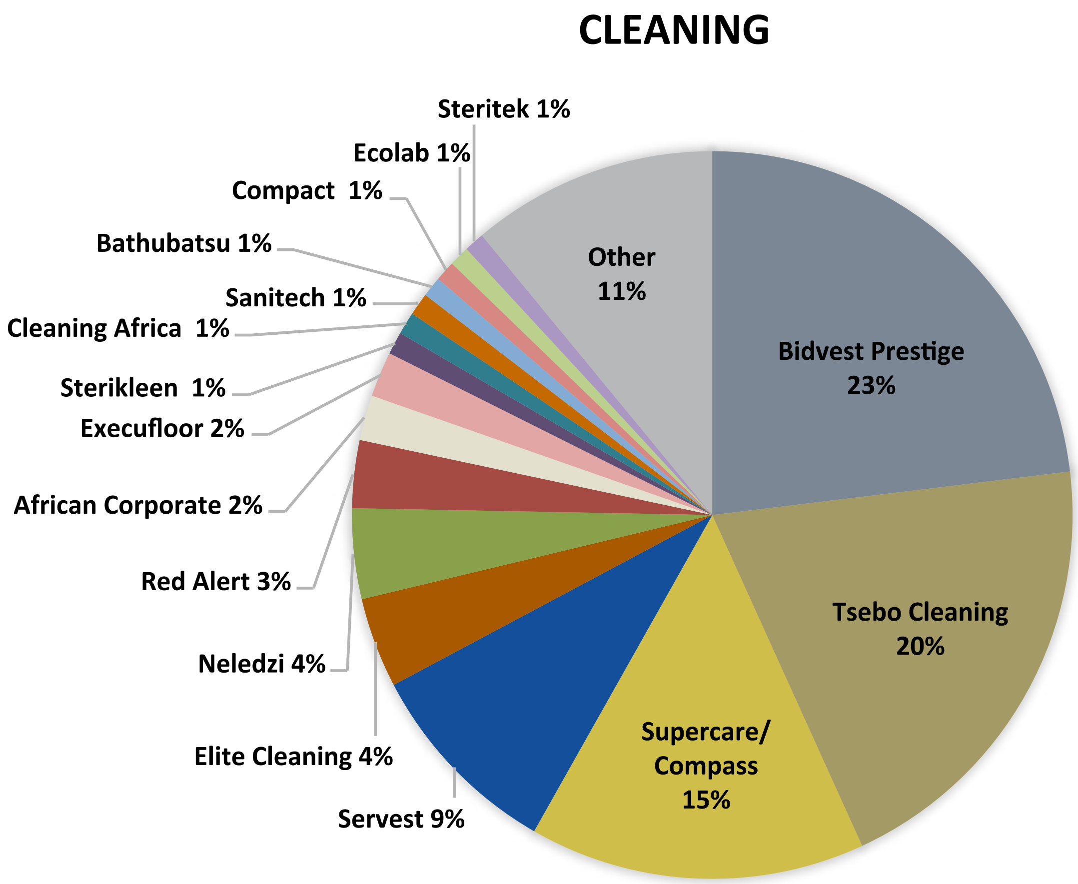


Remote Camp Management

Market share in Remote Camp Management is as follows:

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

FM MARKET SHARE INDICATION: SERVICE LINES

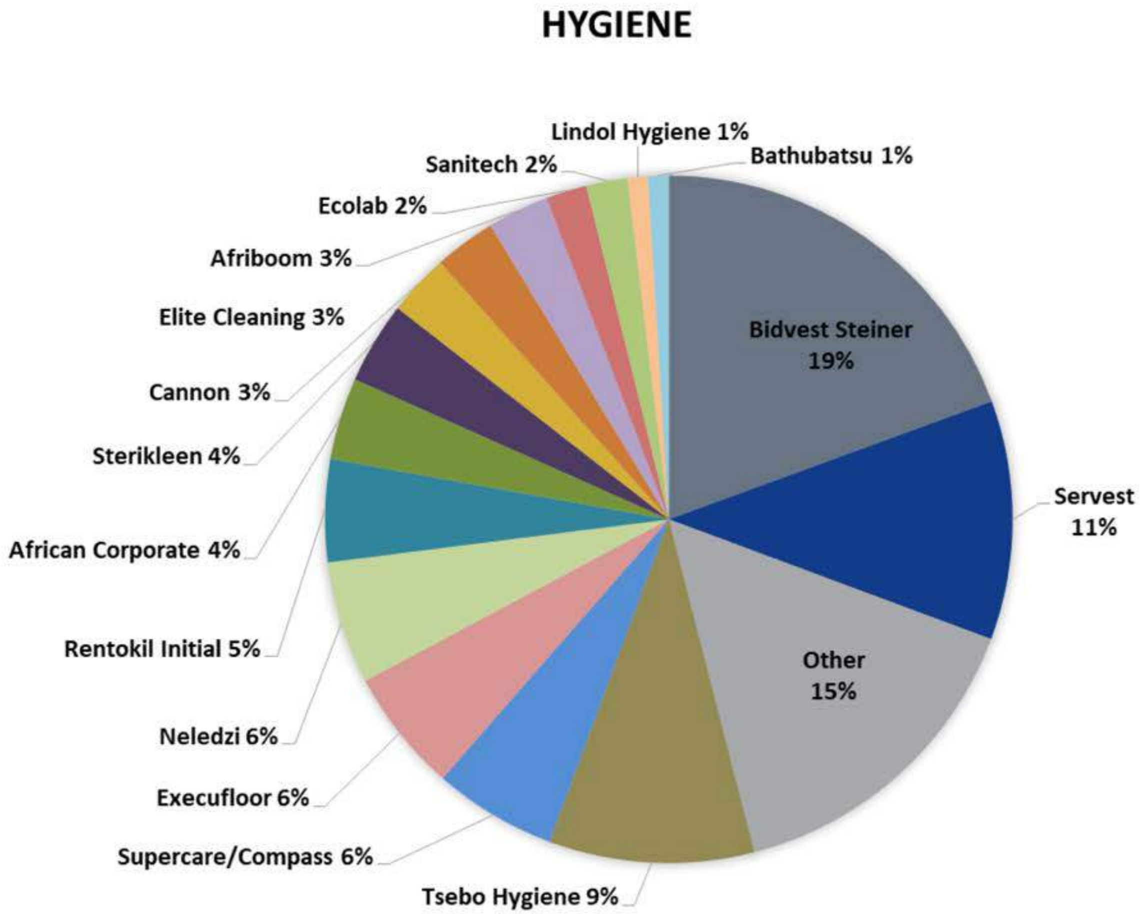


Cleaning

Market share in Cleaning Services is as follows:

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

FM MARKET SHARE INDICATION: SERVICE LINES



Hygiene

Market share in Hygiene Services is as follows:

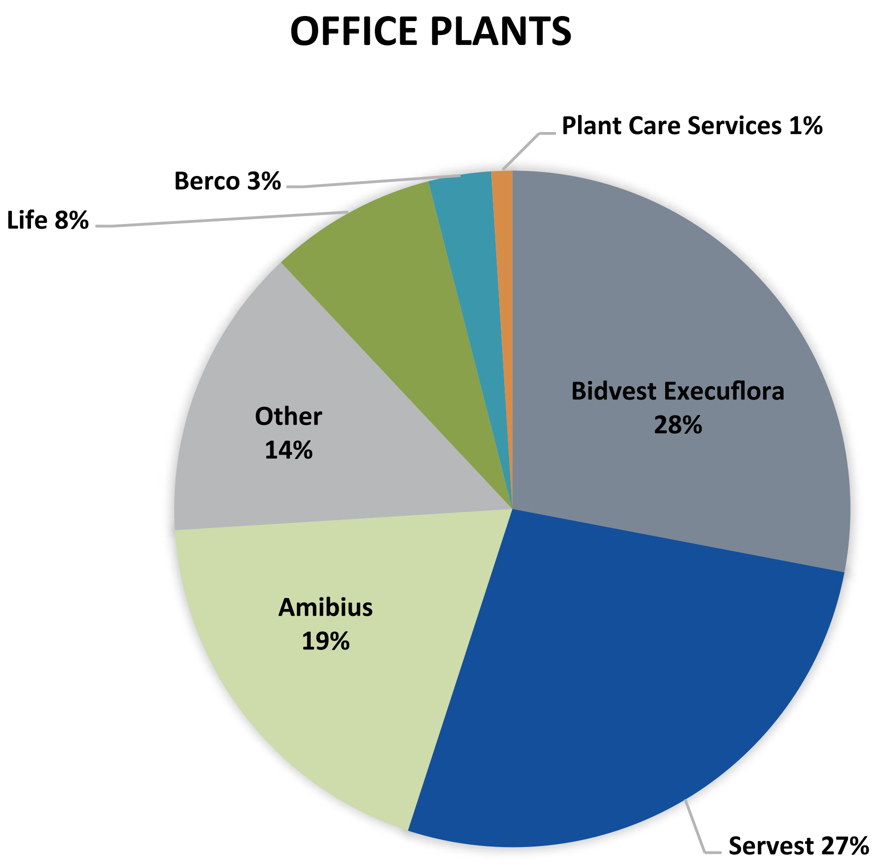
1. Bidvest Steiner (19%)
2. Servest (11%)
3. Tsebo (9%)
4. Compass (6%)
5. Other (17%)

FM MARKET SHARE INDICATION: SERVICE LINES

Office Plants

Market share in Office Plants is as follows:

1. Bidvest Executflora (28%)
2. Servest (27%)
3. Amibius (19%)
4. Life (8%)
5. Other (14%)

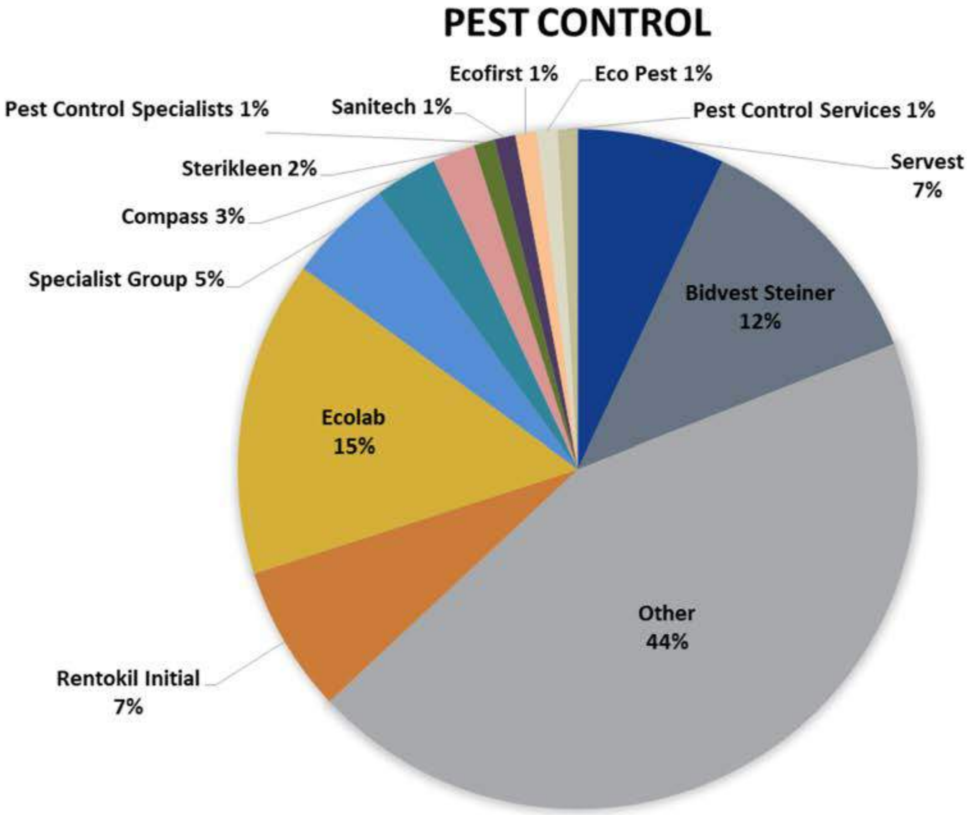


FM MARKET SHARE INDICATION: SERVICE LINES

Pest Control

Market share in Pest Control Services is as follows:

1. Ecolab (15%)
2. Bidvest (12%)
3. Servest (7%)
4. Rentokil (7%)
5. Other (44%)

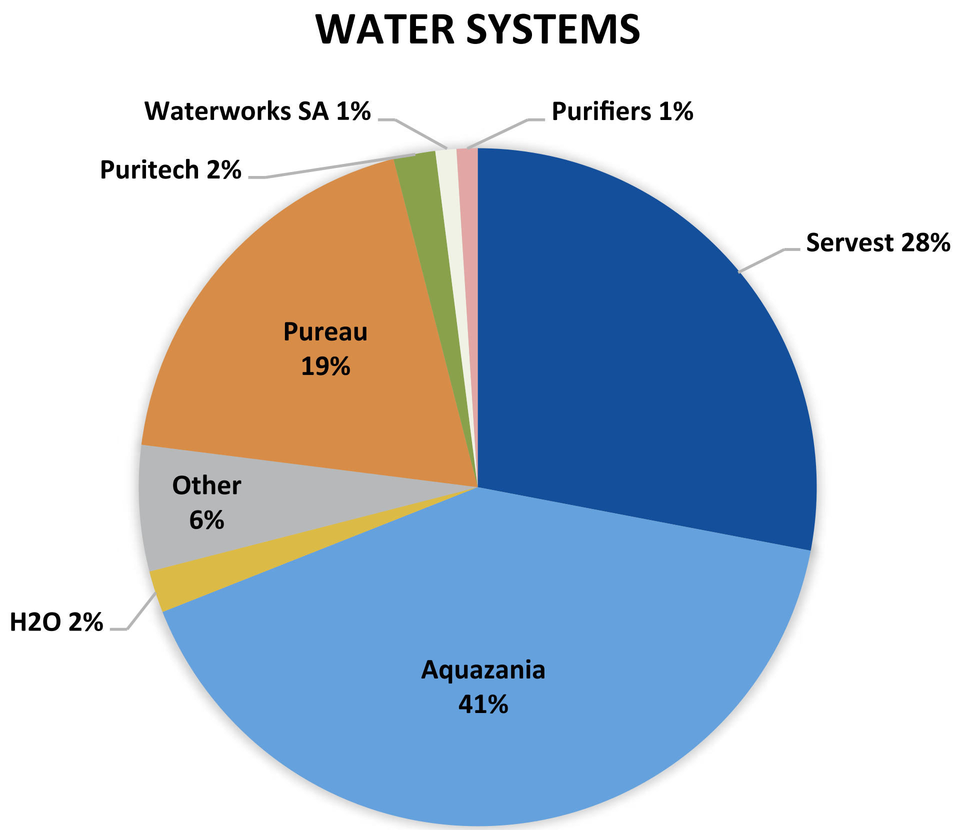


FM MARKET SHARE INDICATION: SERVICE LINES

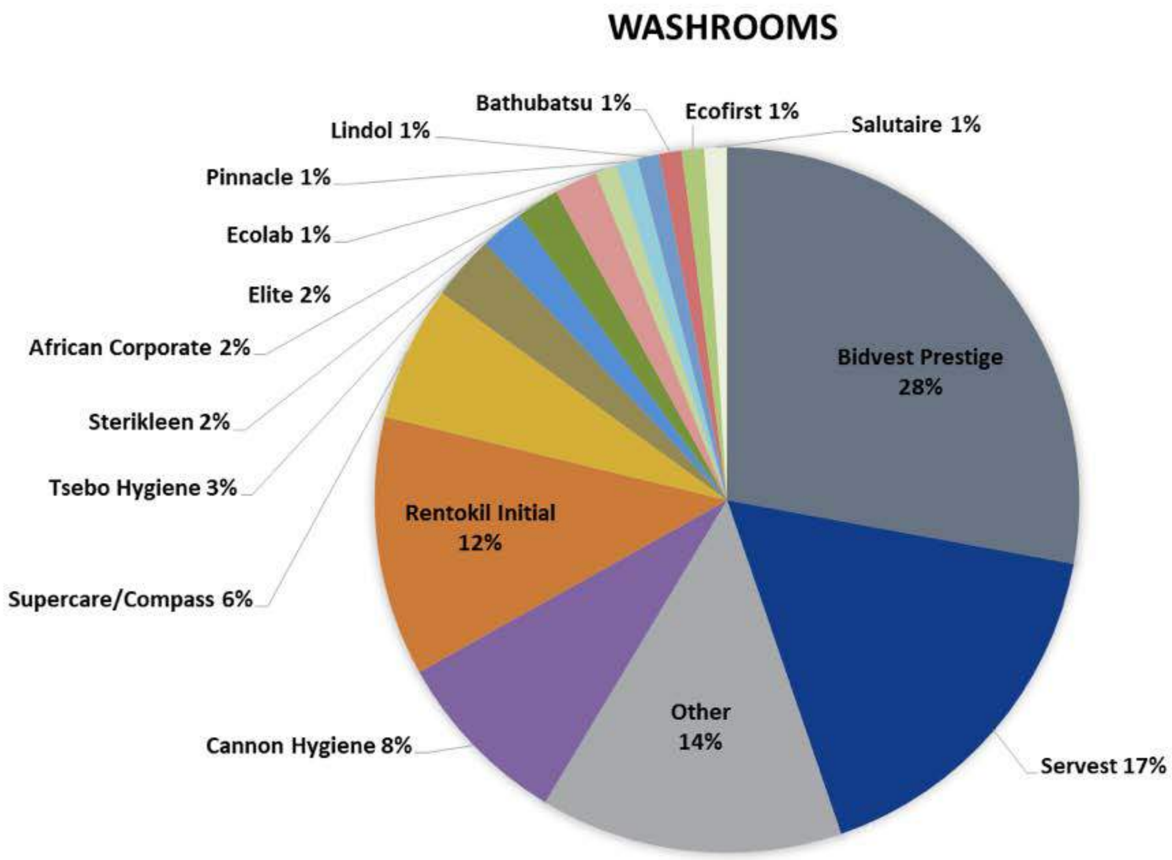
Water Systems

Market share in Water Systems Management is as follows:

1. Aquazania (41%)
2. Servest (28%)
3. Pureau (19%)
4. Other (6%)



FM MARKET SHARE INDICATION: SERVICE LINES

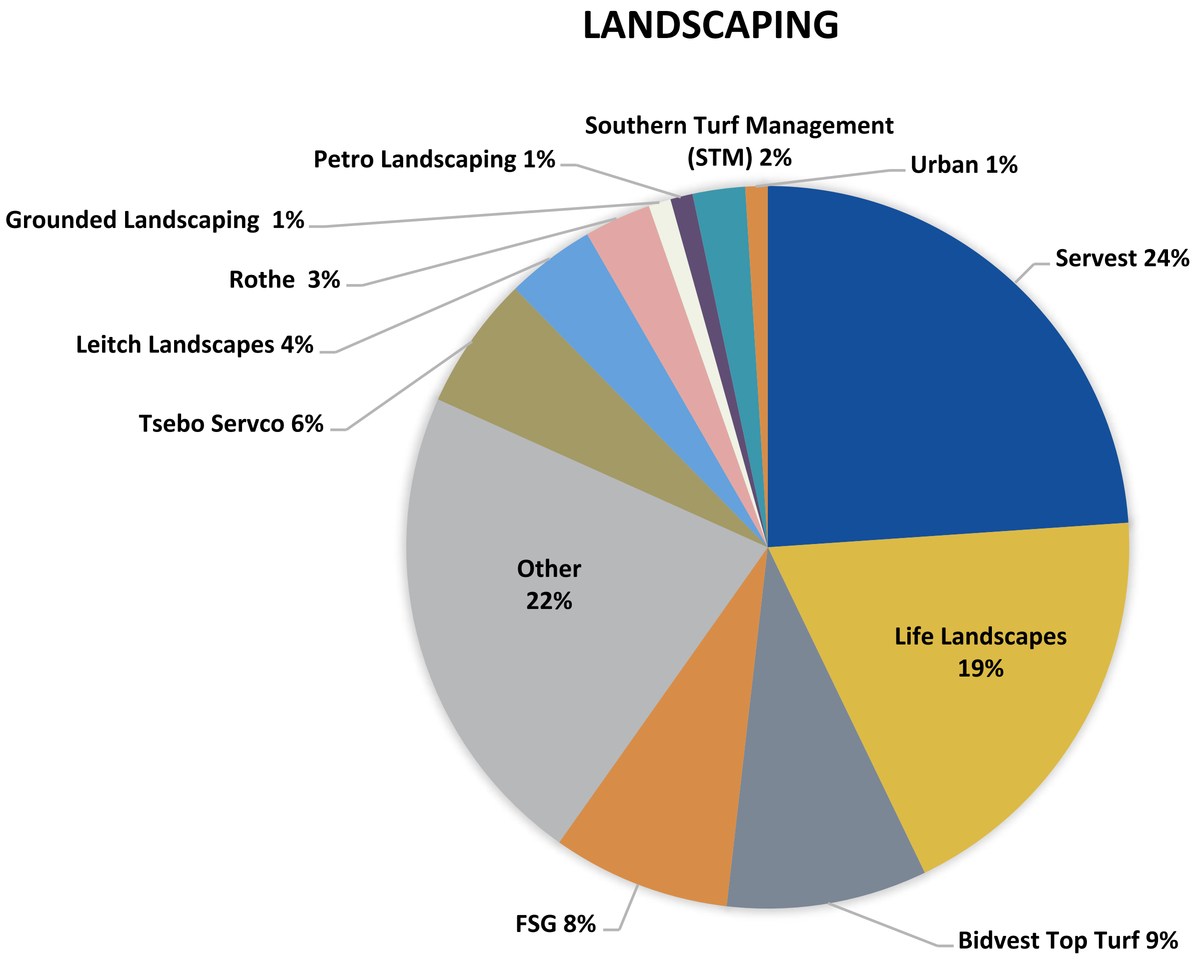


Washrooms

Market share in Washrooms is as follows:

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

FM MARKET SHARE INDICATION: SERVICE LINES



Landscaping

Market share in Landscaping Services is as follows:

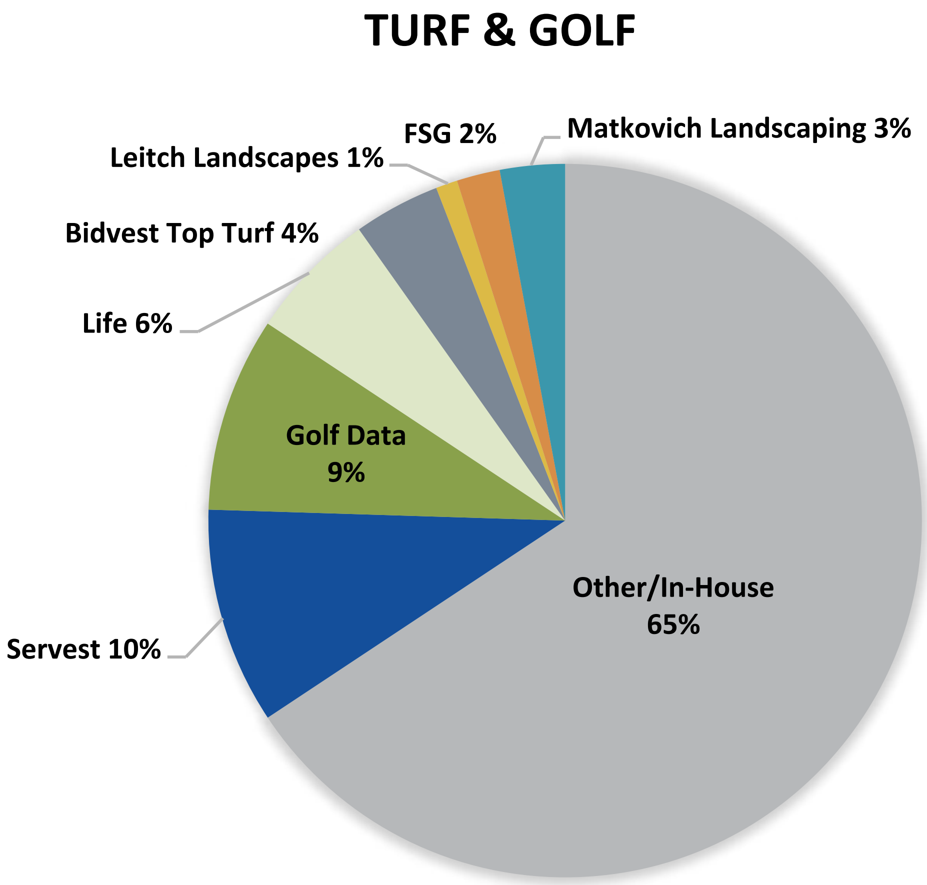
1. Servest (24%)
2. Life Landscapes (19%)
3. FSG (8%)
4. Tsebo (6%)
5. Other (22%)

FM MARKET SHARE INDICATION: SERVICE LINES

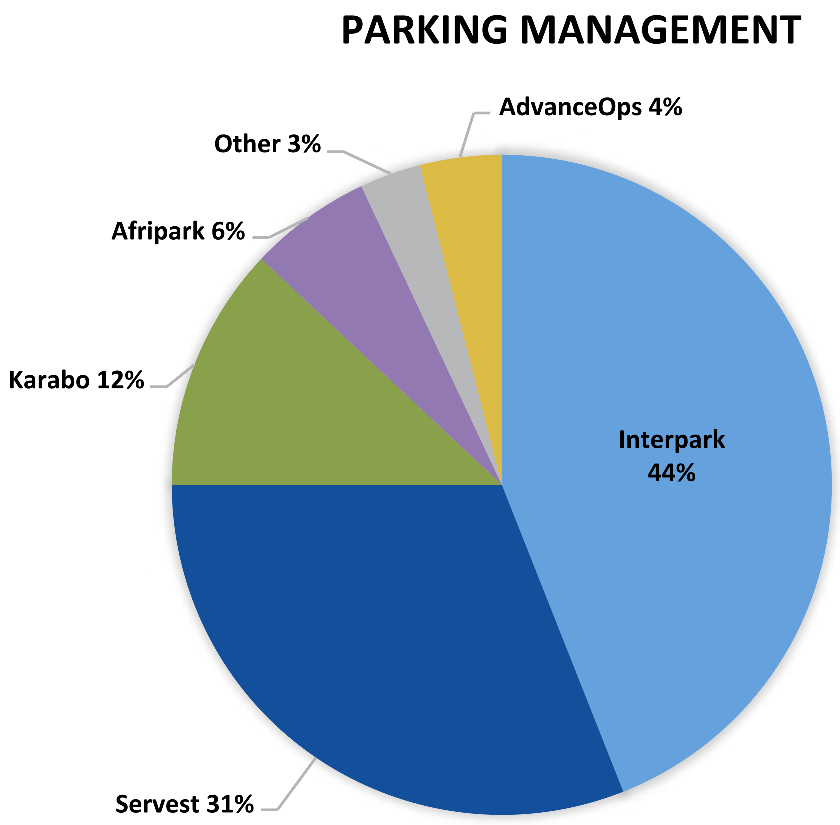
Turf & Golf

Market share in Turf & Golf Estate Management is as follows:

1. In-House (65%)
2. Golf Data (10%)
3. Servest (9%)
4. Life Landscapes (6%)
5. Bidvest Top Turf (4%)



FM MARKET SHARE INDICATION: SERVICE LINES



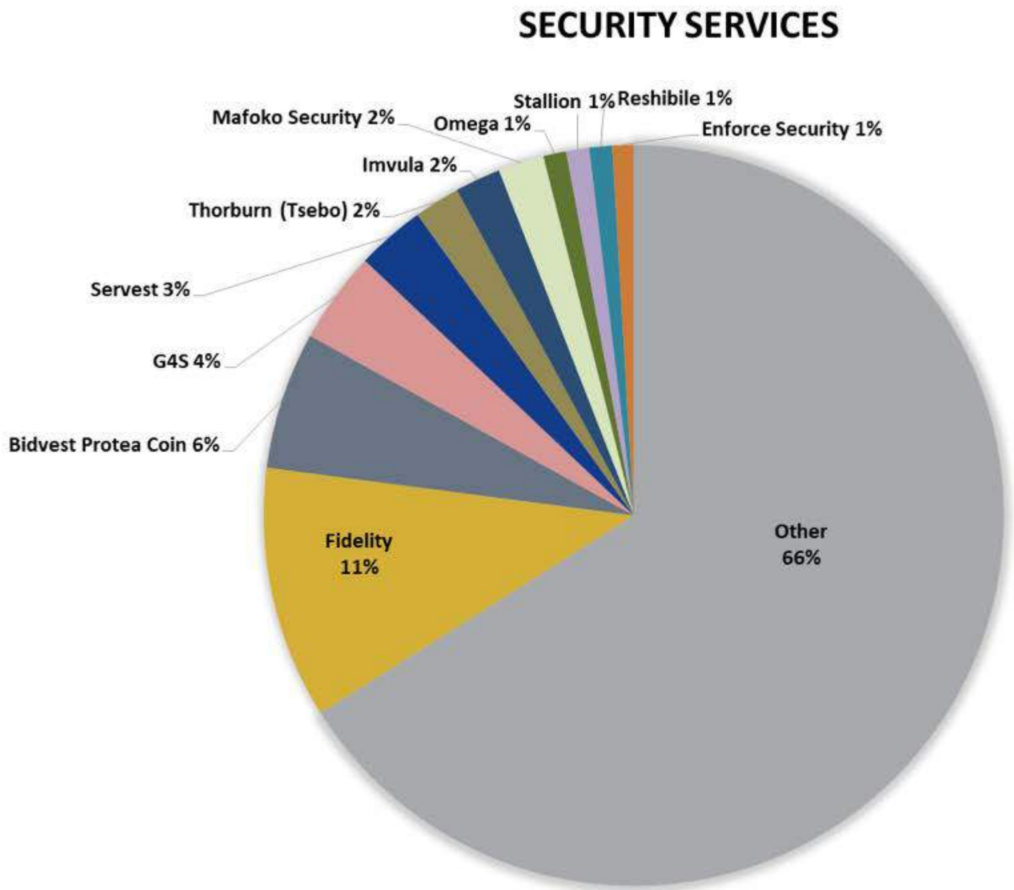
Parking Management

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.

FM MARKET SHARE INDICATION: SERVICE LINES



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.

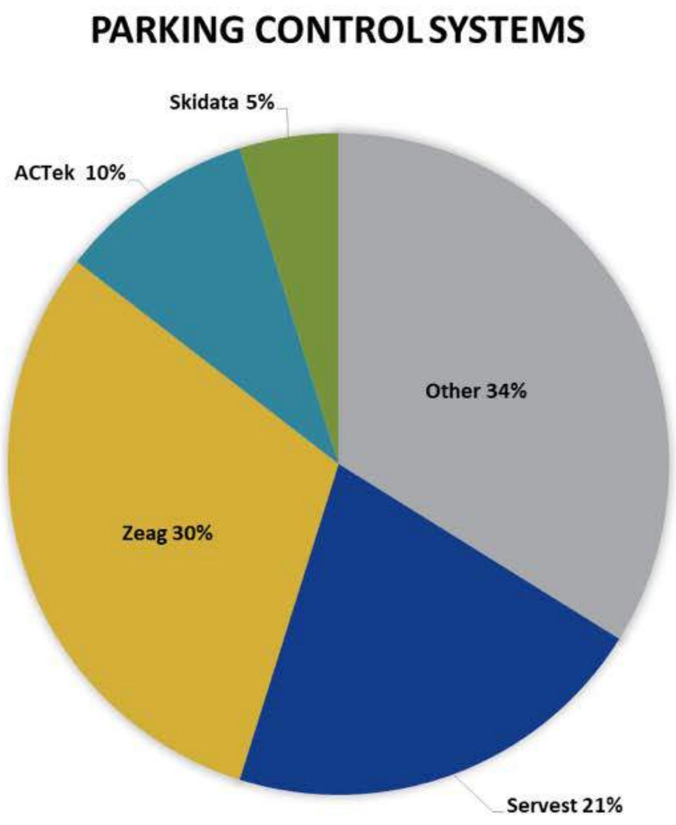
FM MARKET SHARE INDICATION: SERVICE LINES

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.



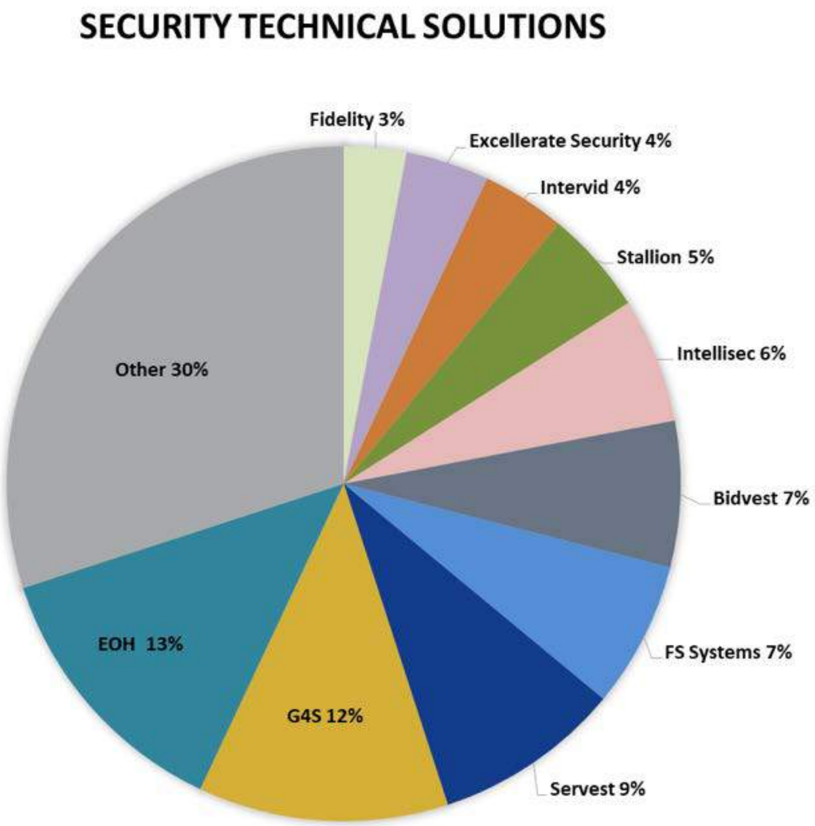
FM MARKET SHARE INDICATION: SERVICE LINES

Security Technical Solutions

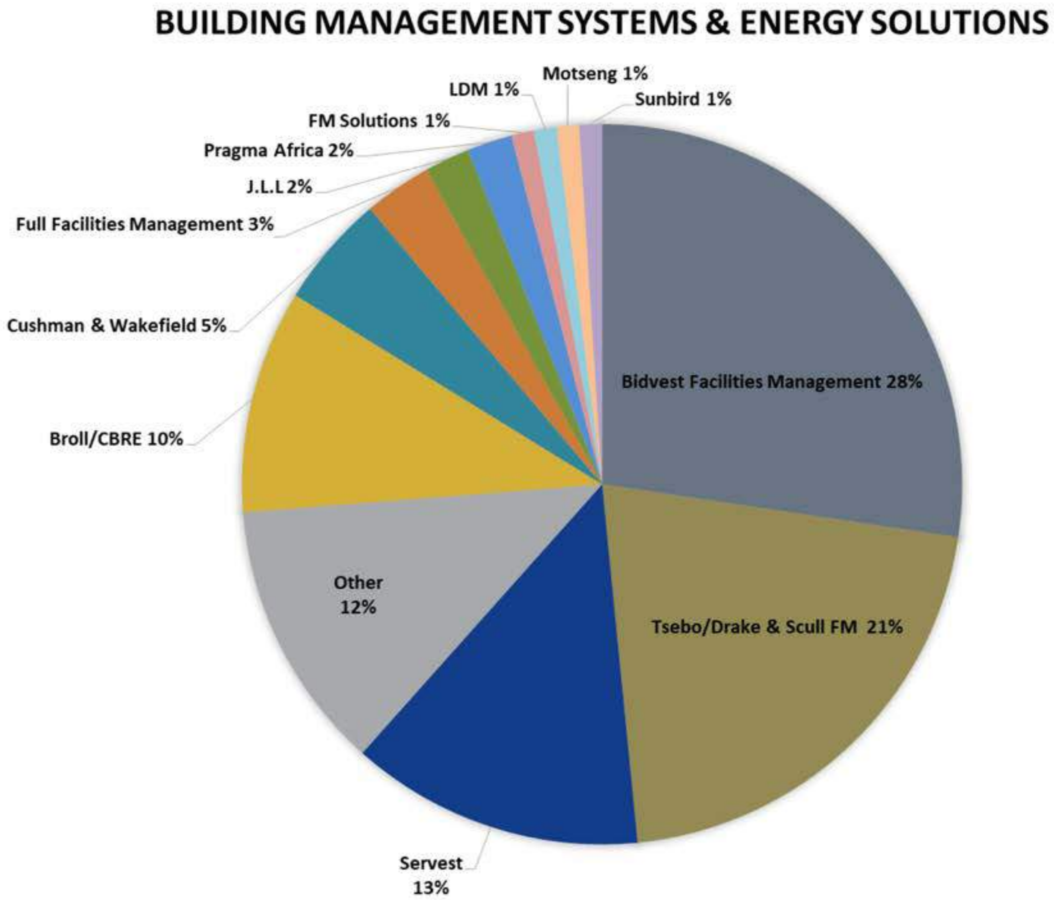
Market share for Security Technical Solutions* as follows:

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.



FM MARKET SHARE INDICATION: SERVICE LINES



Building Management Systems & Energy Solutions

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

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

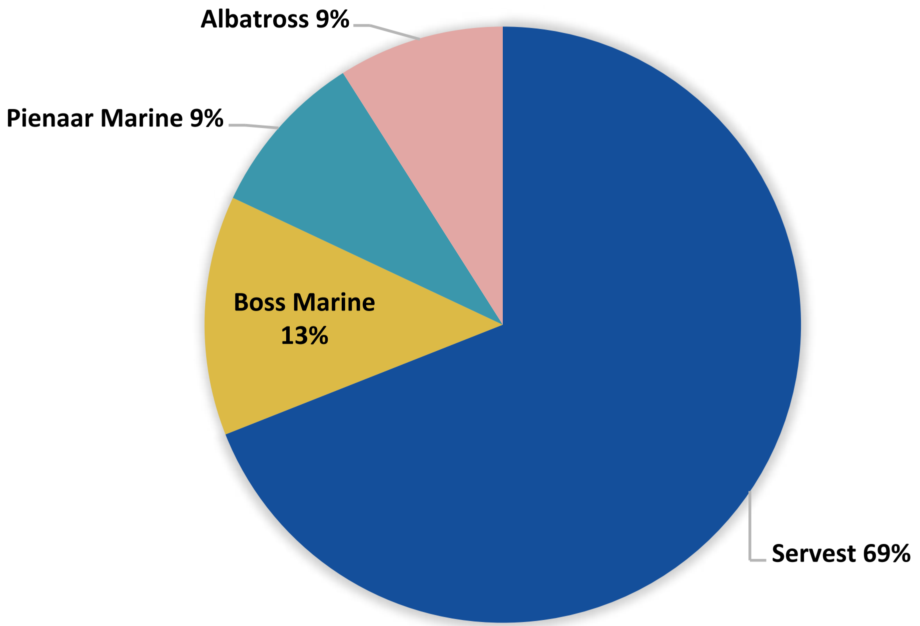
FM MARKET SHARE INDICATION: SERVICE LINES

Marine Transport Solutions

Market share for Marine Transport Solutions (or offshore supply vessels) is as follows:

1. Servest (69%)
2. Boss Marine (13%)
3. Albatross (9%)
4. Pienaar Marine (9%)

MARINE TRANSPORT SOLUTIONS

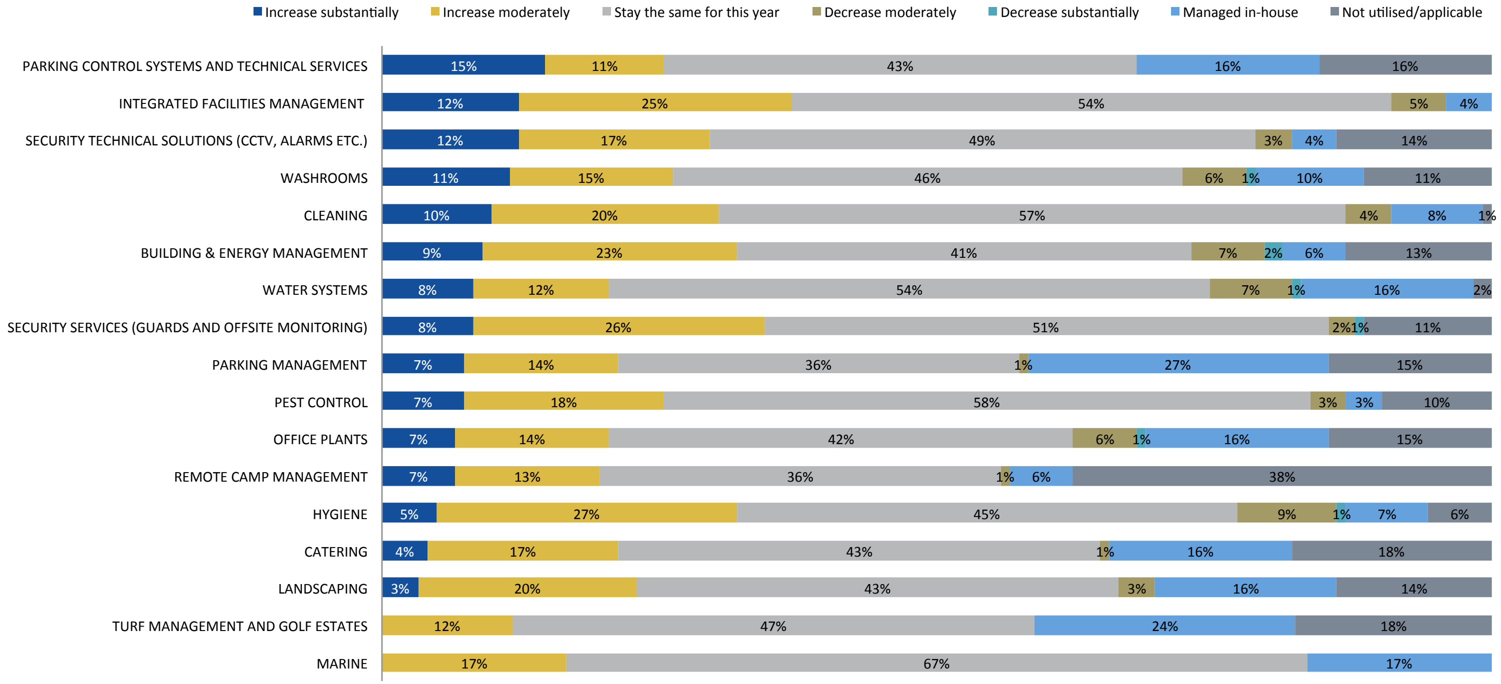


FM GROWTH & SERVICE LINES

FM GROWTH & SERVICE LINES

Respondents to the survey indicated that they will substantially increase their outsourced activities for Parking Control Systems and Technical Services, Integrated Facilities Management and Security Technical Solutions. Overall, Hygiene and Security Services will also witness substantial to moderate growth in the next 12 months.

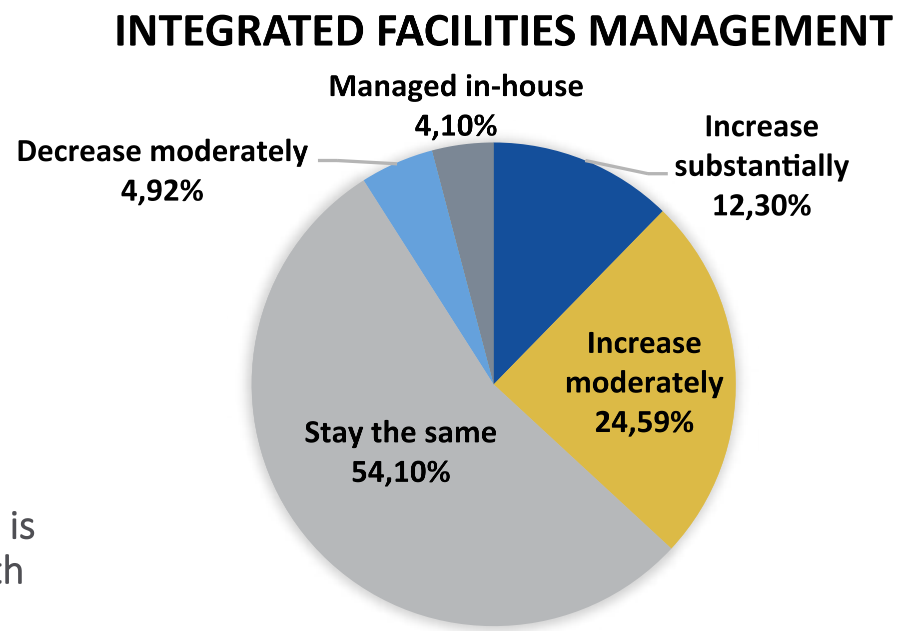
HOW WILL YOUR ORGANISATION'S FM OUTSOURCED ACTIVITIES EVOLVE OR GROW OVER THE NEXT 12 MONTHS IN THE FOLLOWING AREAS?



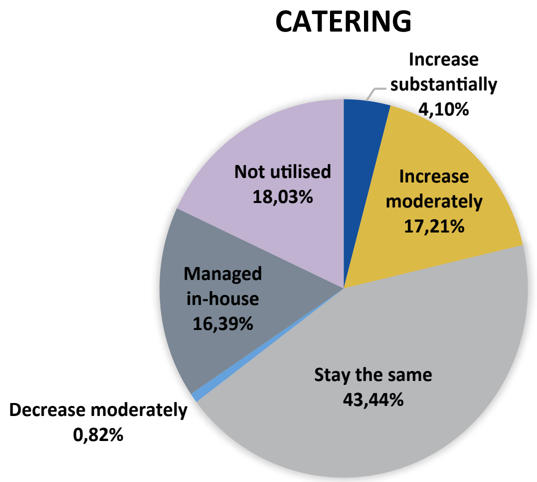
FM GROWTH & SERVICE LINES

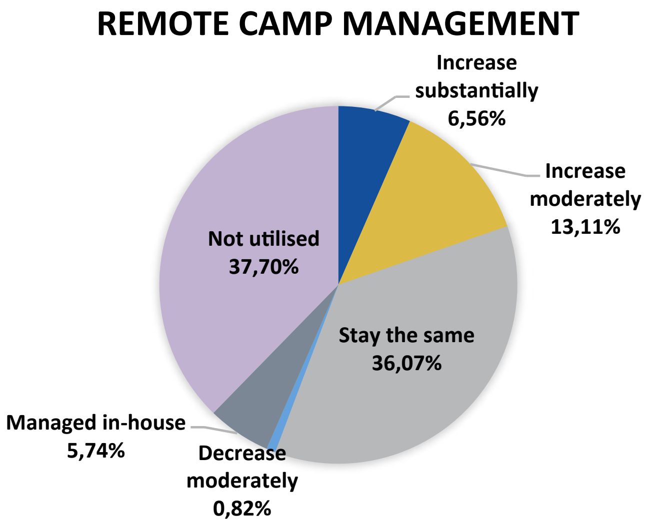
How Will Your Organisation's FM Outsourced Activities Grow in the Next 12 Months?

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.



FM GROWTH & SERVICE LINES

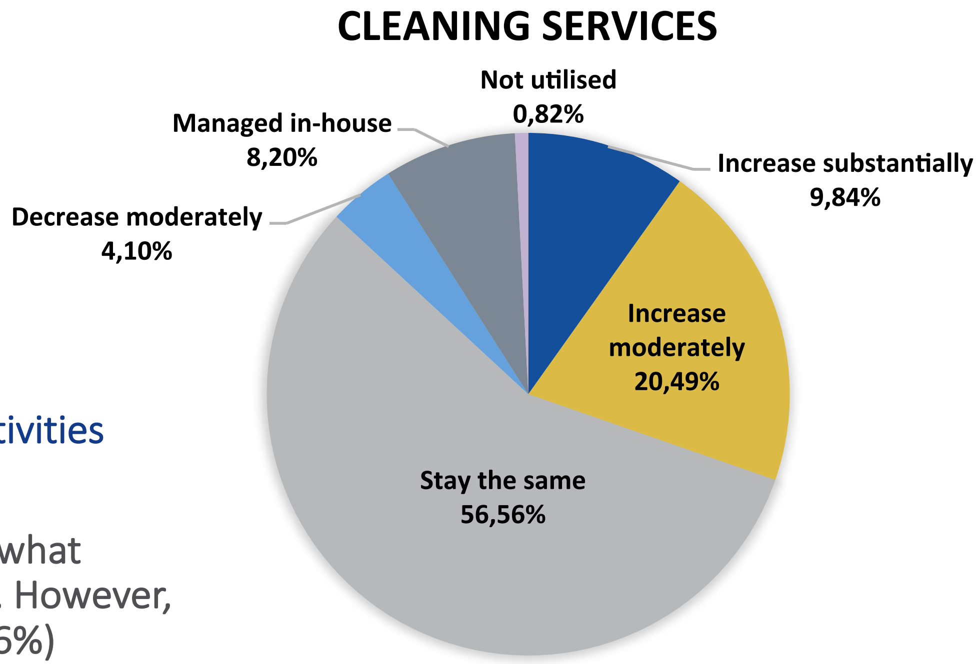




How Will Your Organisation's FM Outsourced Activities Grow in the Next 12 Months?

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



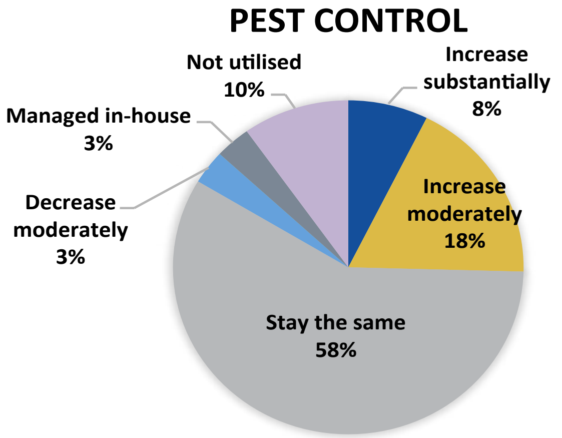
How Will Your Organisation's FM Outsourced Activities Grow in the Next 12 Months?

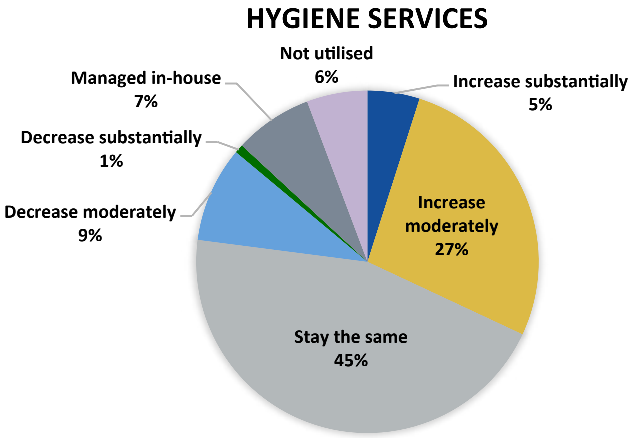
Forecasted growth for Cleaning Services is somewhat encouraging at just over 30% for the year ahead. However, over half of the respondents to the survey (56.56%) indicated that their outsourced Cleaning Services would remain the same for the year with 4.10% saying that these services would decrease moderately.

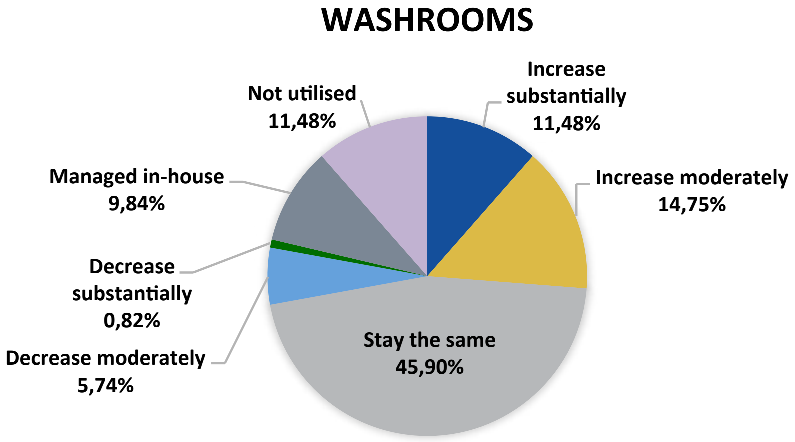
FM GROWTH & SERVICE LINES

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

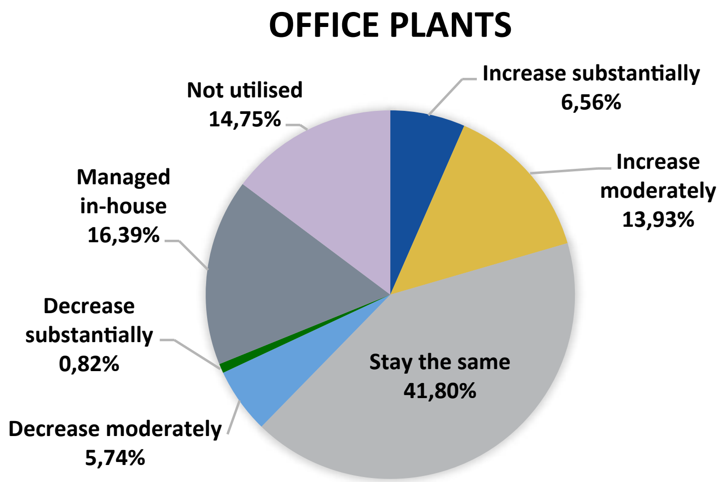
Hygiene (32%), Pest Control Services (26%) and Washroom facilities (26.23%) will all see substantial to moderate growth over the next 12 months. 45 – 58% of respondents to the survey indicated these outsourced services would not evolve further over the next year, while 9% of organisations will decrease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

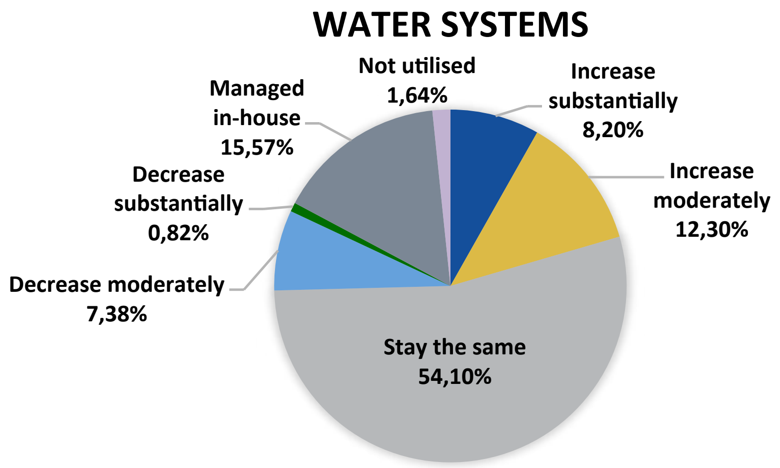






FM GROWTH & SERVICE LINES





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

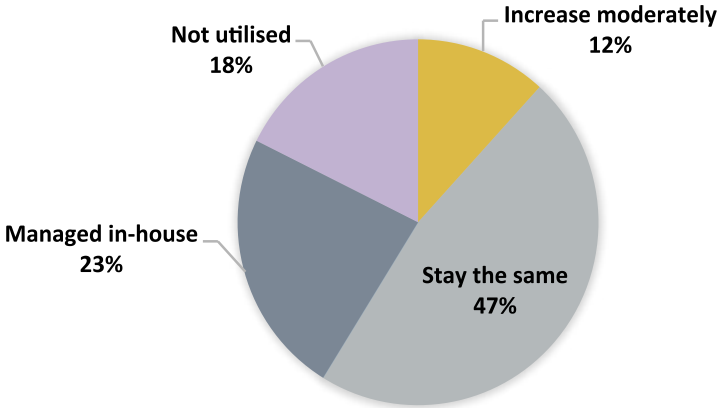
Outsourced services for Office Plants (20.49%) will grow (literally and figuratively) in the next 12 months at over 20% as will Water Systems (20.5%). Office parks, buildings and organisations that utilise these services indicated that they would not develop their outsourced Office Plants services further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

FM GROWTH & SERVICE LINES

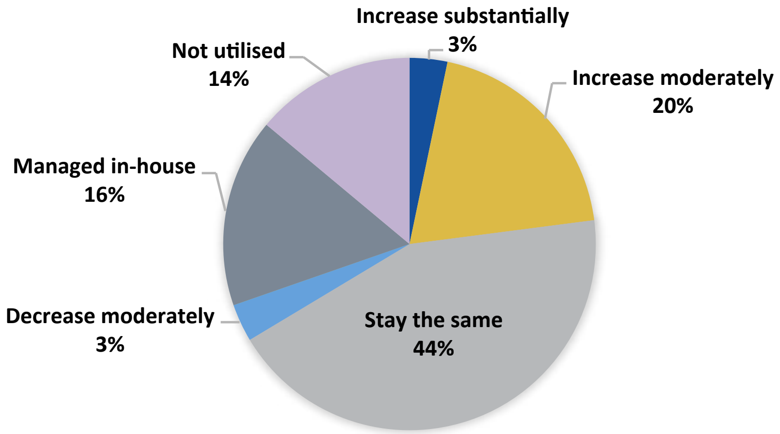
How Will Your Organisation's FM Outsourced Activities Grow in the Next 12 Months?

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.

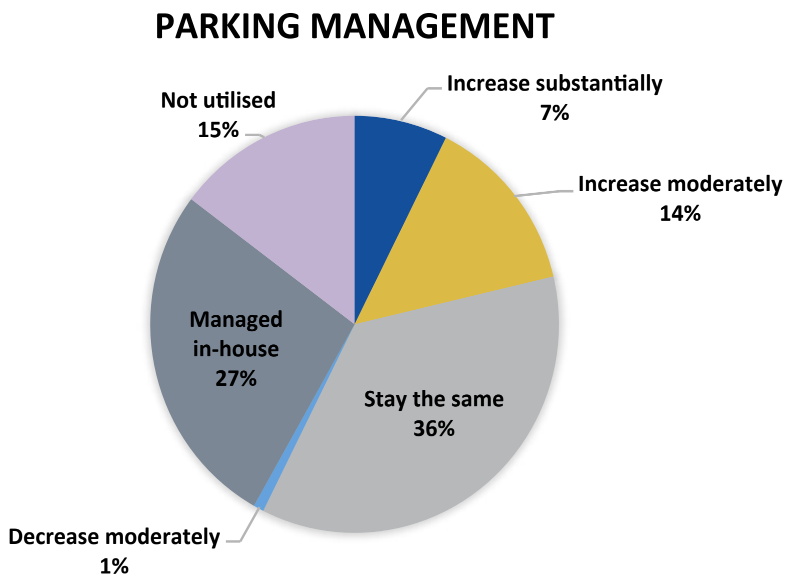
GOLF AND TURF MANAGEMENT



LANDSCAPING



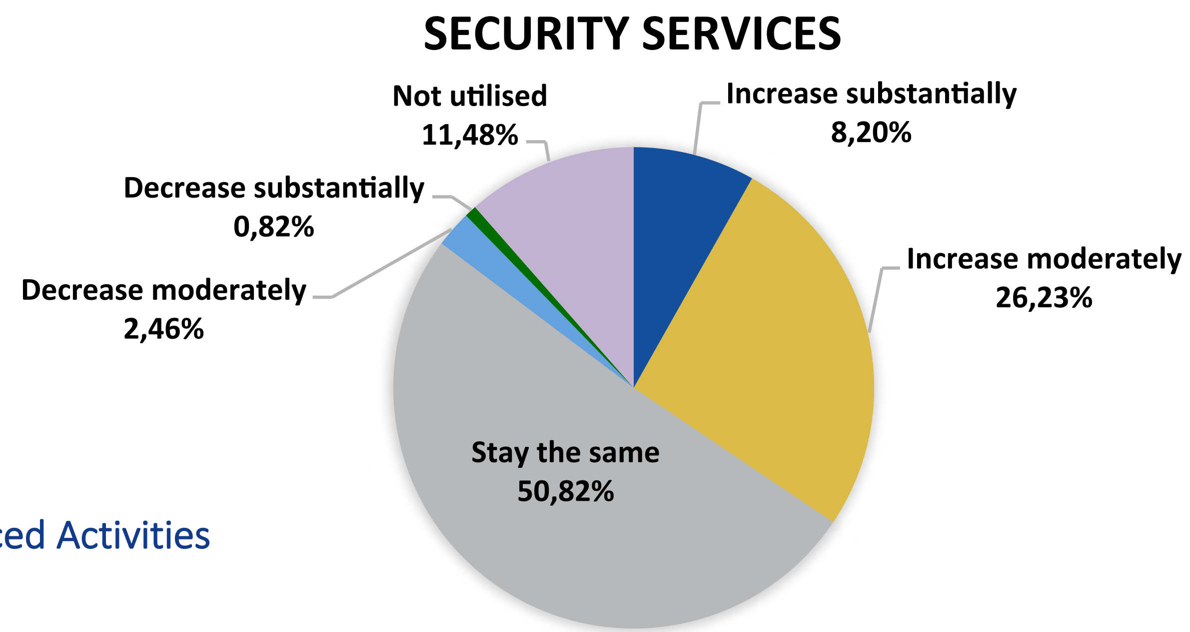
FM GROWTH & SERVICE LINES



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.

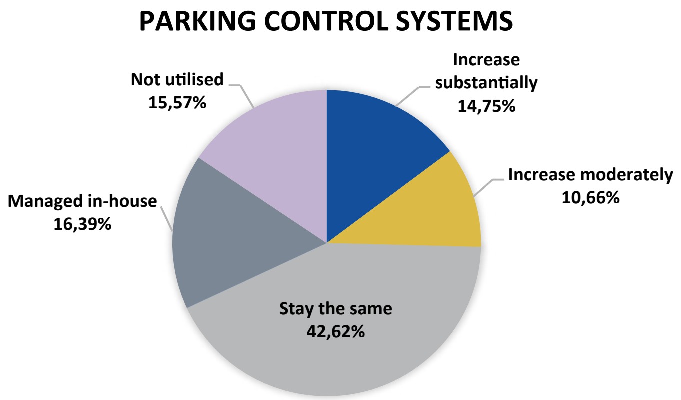
FM GROWTH & SERVICE LINES

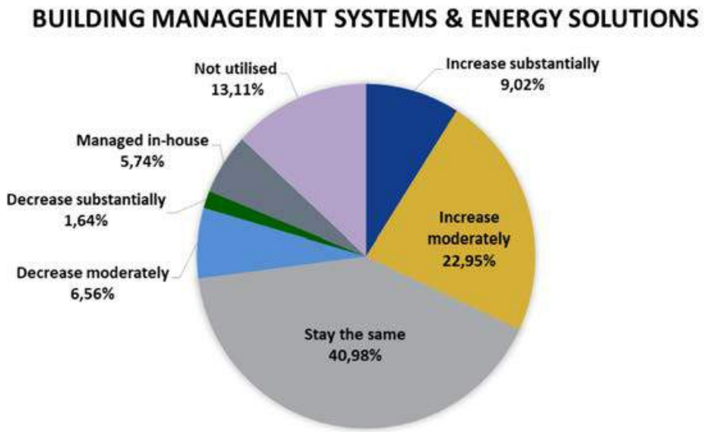


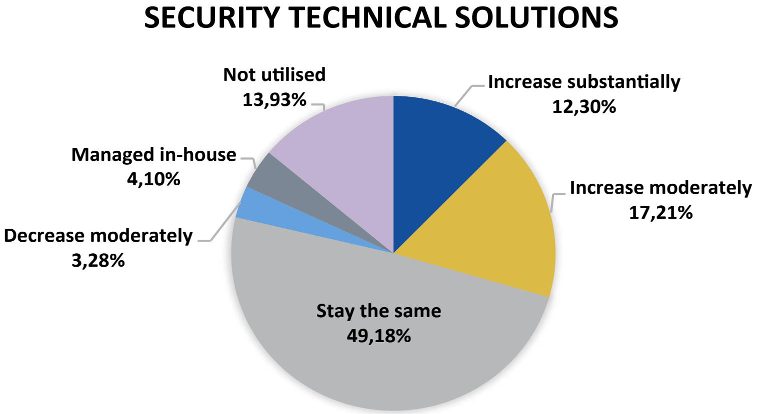
How Will Your Organisation's FM Outsourced Activities Grow in the Next 12 Months?

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.

FM GROWTH & SERVICE LINES







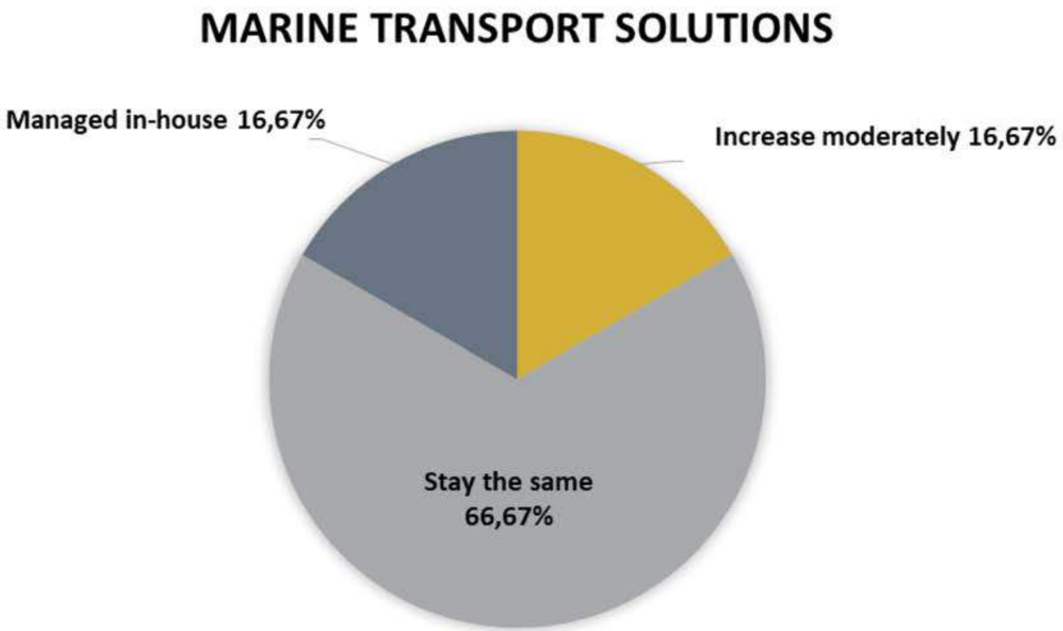
How Will Your Organisation's FM Outsourced Activities Grow in the Next 12 Months?

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.

FM GROWTH & SERVICE LINES

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

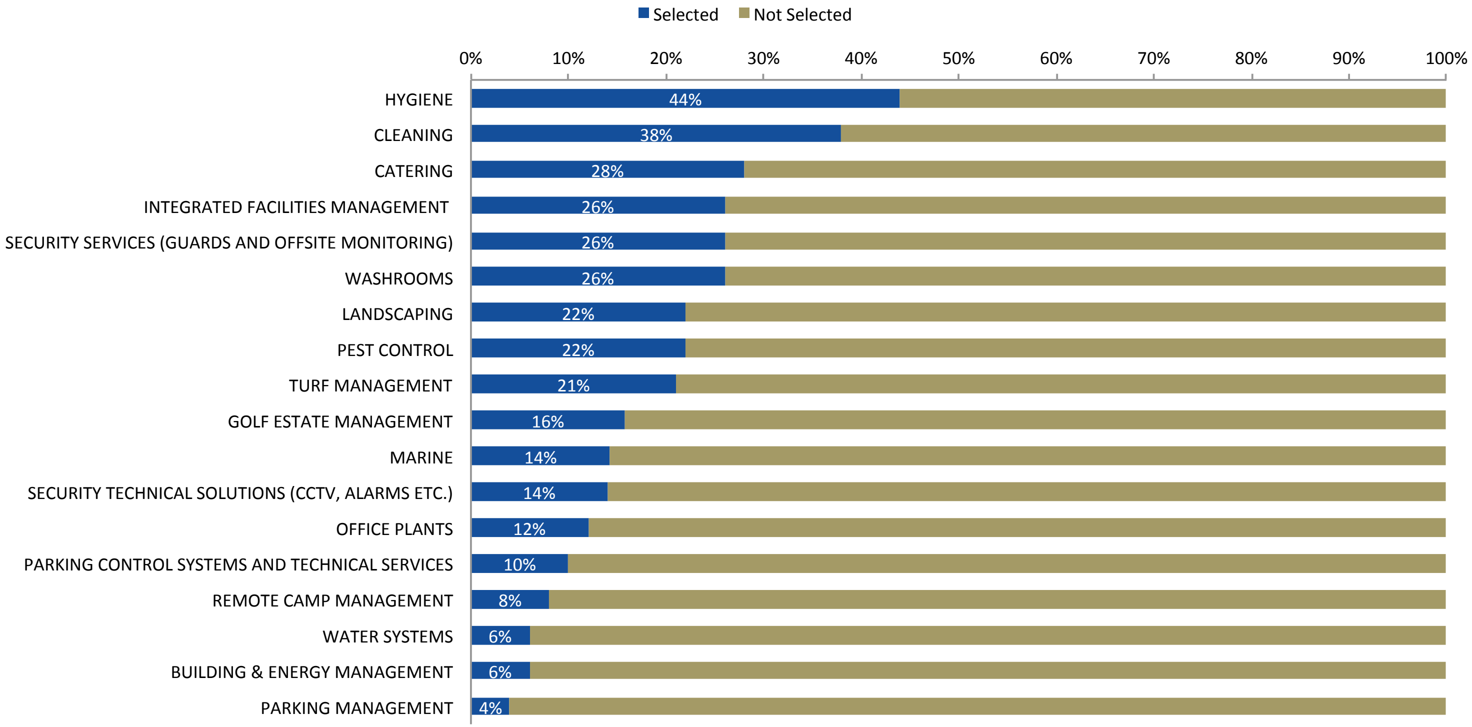
A very specialised area of FM, outsourced Marine Transport Solutions will enjoy moderate growth of 16.67% for the next 12 months with most shipping and port agents (66.67%) indicating that their outsourced services would remain the same for the year ahead.



FM GROWTH & SERVICE LINES

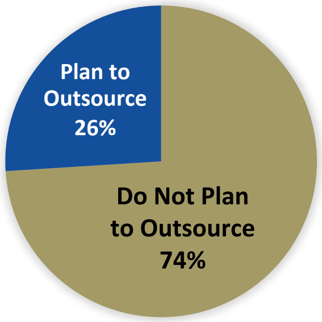
When asked which FM services they are planning to outsource in the next 12 months, end-users and clients indicated that they were looking to outsource Hygiene Services (44%), Cleaning Services (38%) and Catering (28%). Integrated Facilities Management, Security Services, Washrooms (all at 26%) are also 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)?

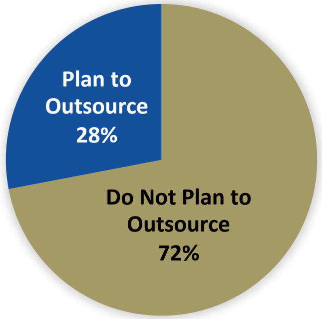


FM GROWTH & SERVICE LINES

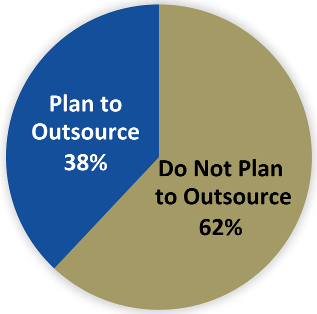
INTEGRATED FACILITIES MANAGEMENT



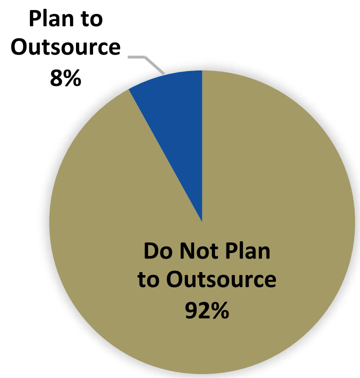
CATERING



CLEANING SERVICES

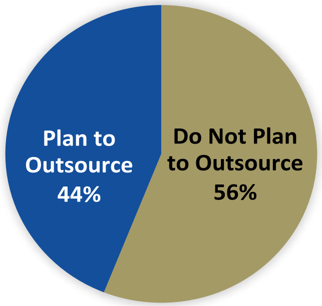


REMOTE CAMP MANAGEMENT

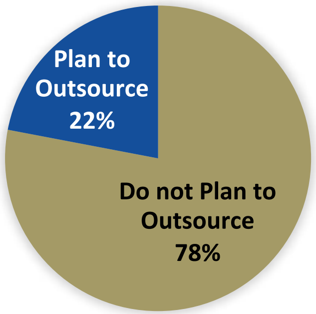


FM GROWTH & SERVICE LINES

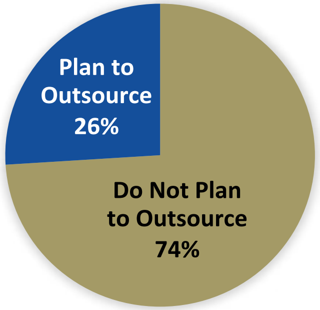
HYGIENE SERVICES



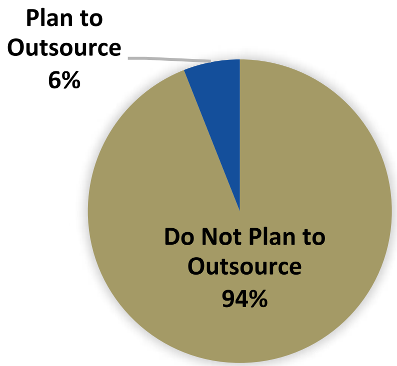
PEST CONTROL



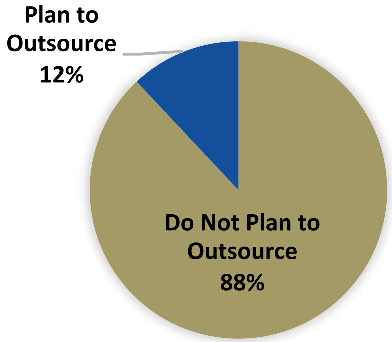
WASHROOMS



WATER SYSTEMS

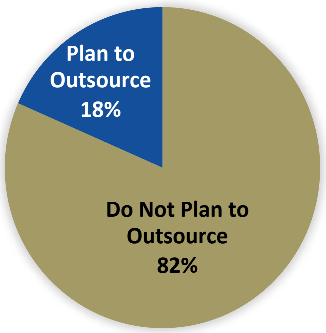


OFFICE PLANTS

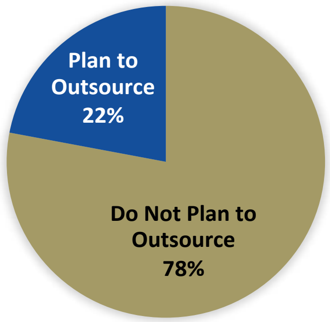


FM GROWTH & SERVICE LINES

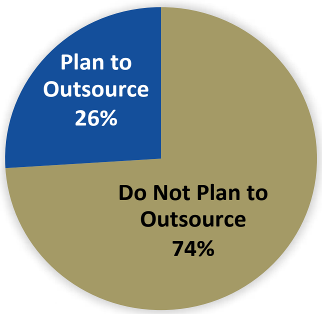
GOLF AND TURF MANAGEMENT



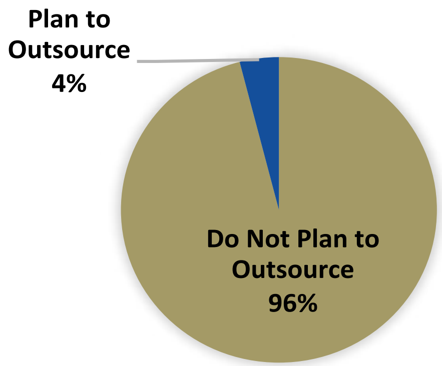
LANDSCAPING



SECURITY SERVICES

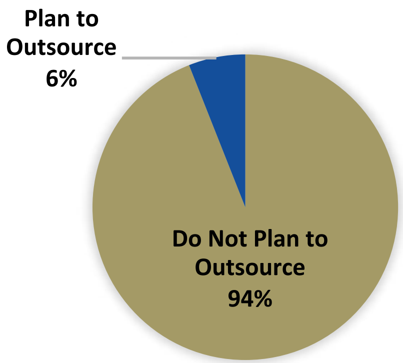


PARKING MANAGEMENT

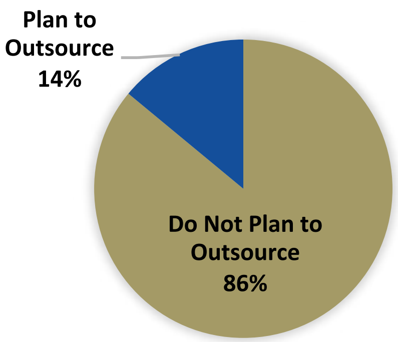


FM GROWTH & SERVICE LINES

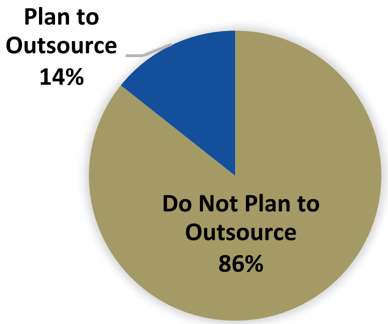
BUILDING MANAGEMENT SYSTEMS & ENERGY SOLUTIONS



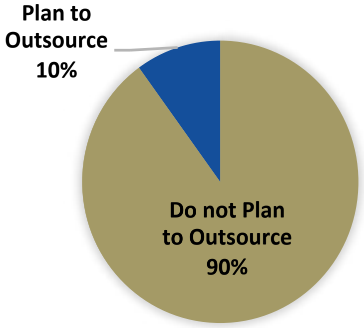
SECURITY TECHNICAL SOLUTIONS



MARINE TRANSPORT SOLUTIONS

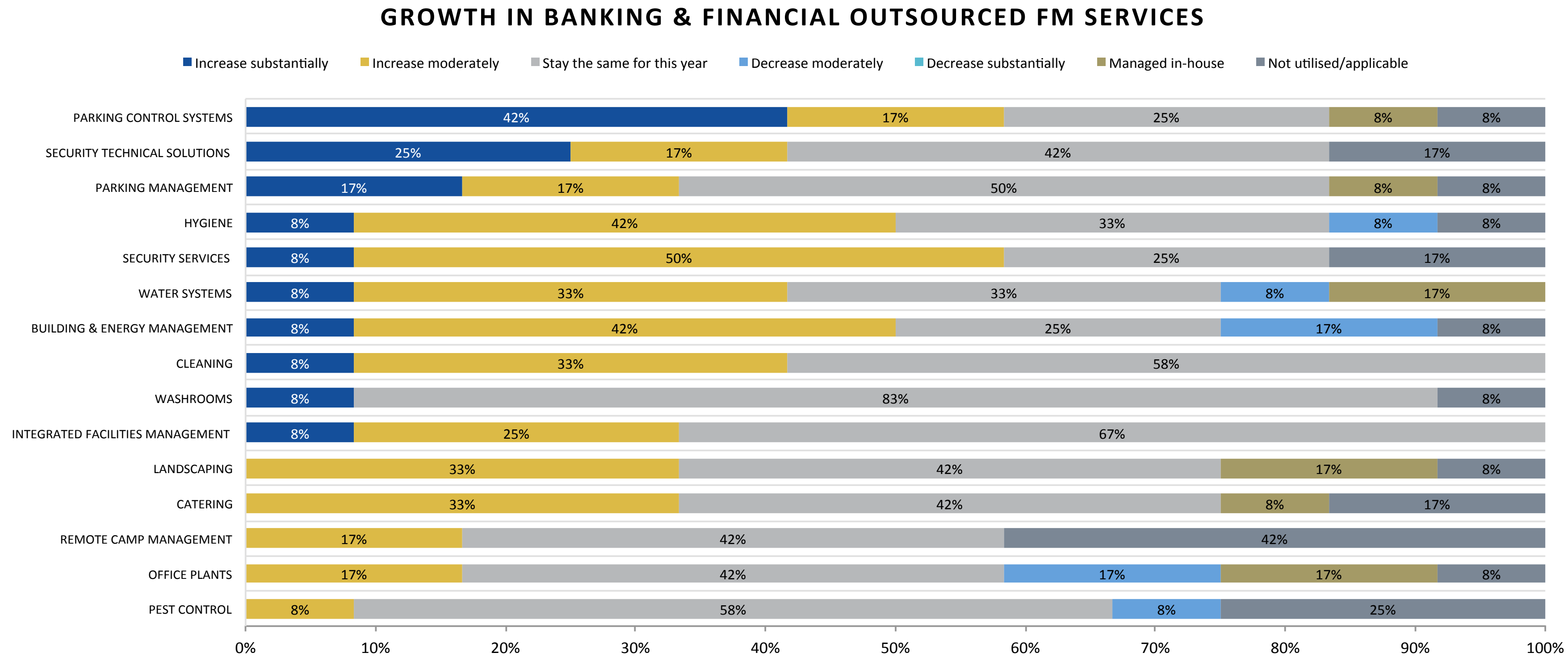


PARKING CONTROL SYSTEMS



VERTICAL INDUSTRY GROWTH: FM SERVICES

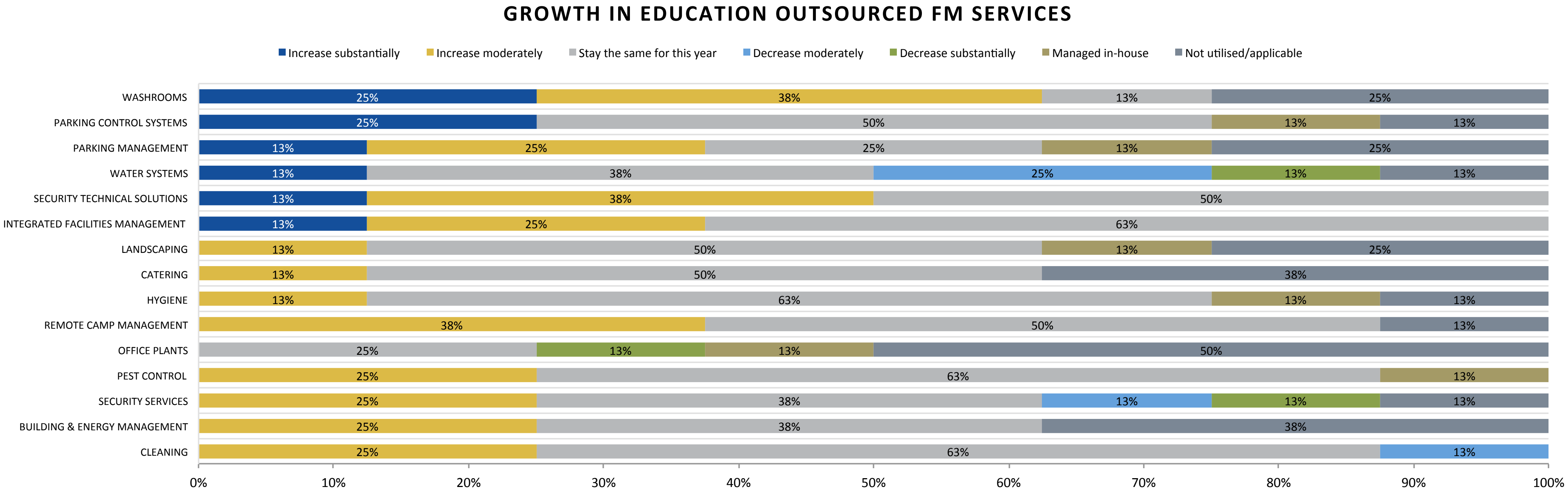
VERTICAL INDUSTRY GROWTH: FM SERVICES



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.

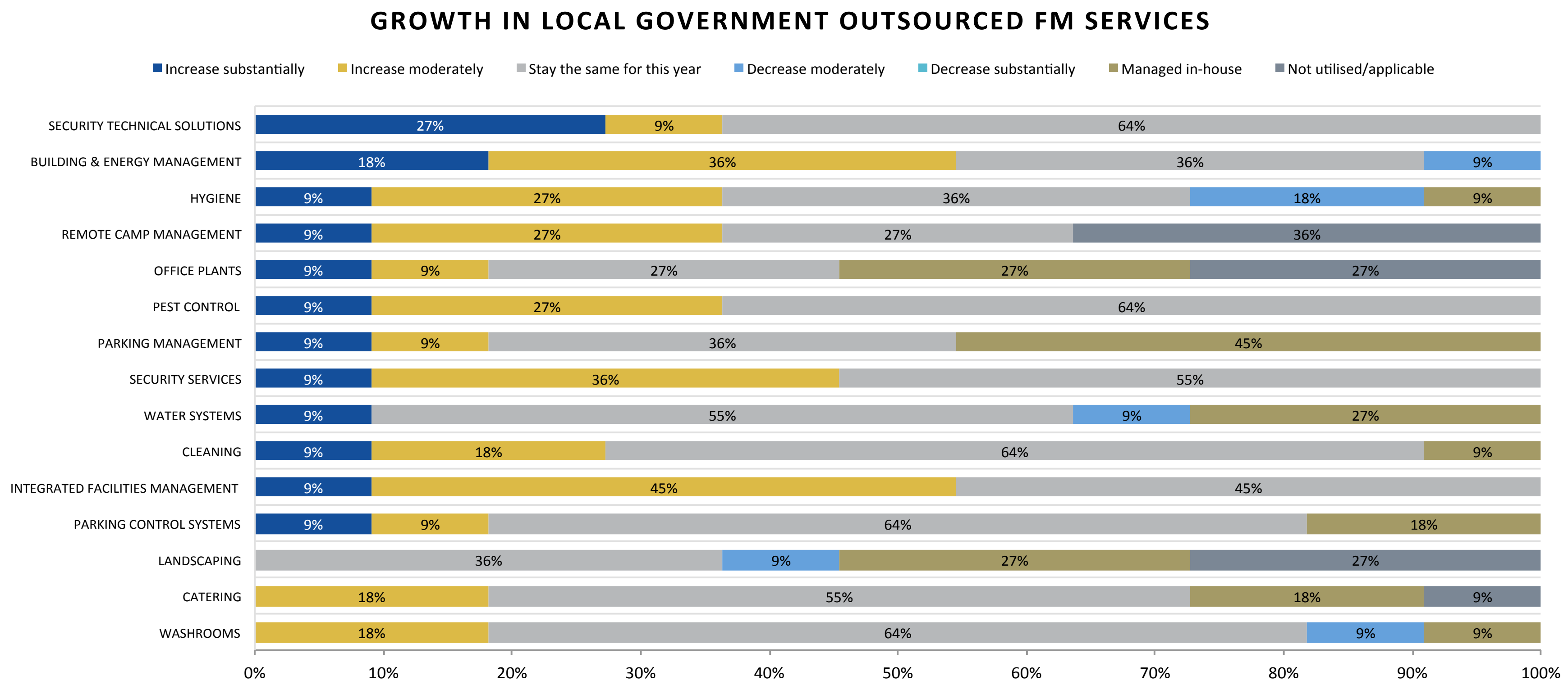
VERTICAL INDUSTRY GROWTH: FM SERVICES



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.

VERTICAL INDUSTRY GROWTH: FM SERVICES

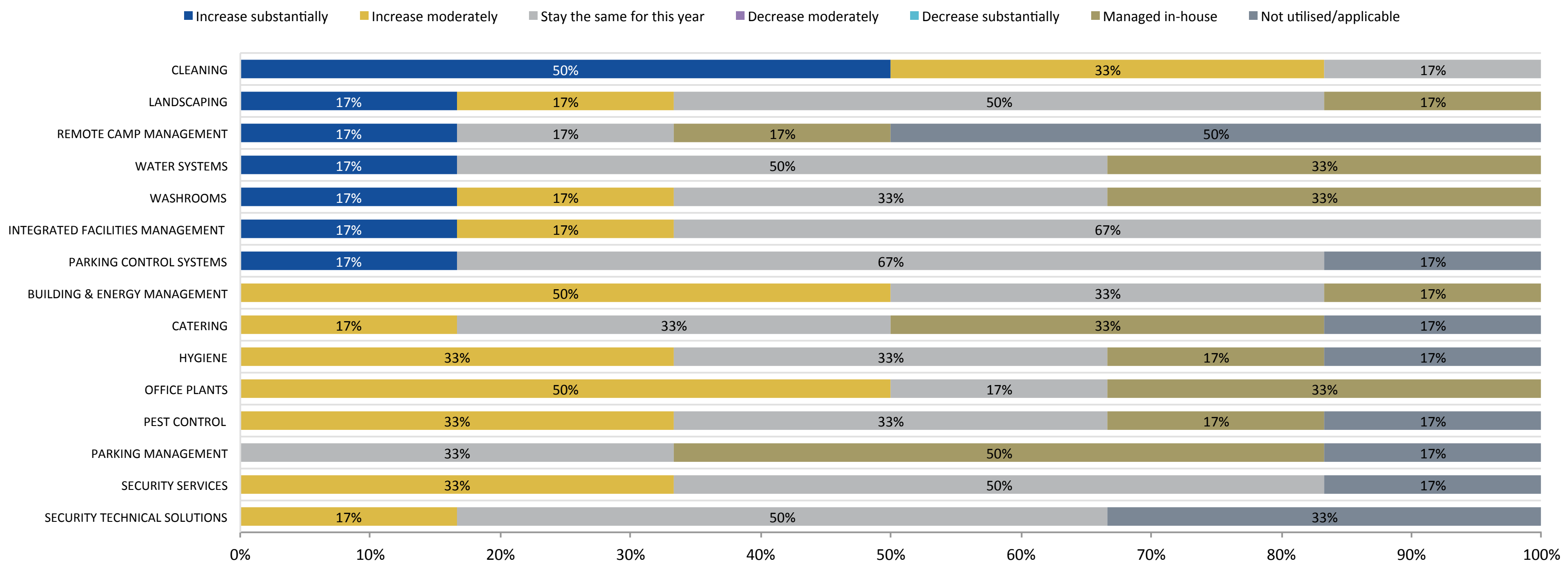


How Will Your Organisation’s FM Outsourced Activities in Local Government Grow in the Next 12 Months?

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.

VERTICAL INDUSTRY GROWTH: FM SERVICES

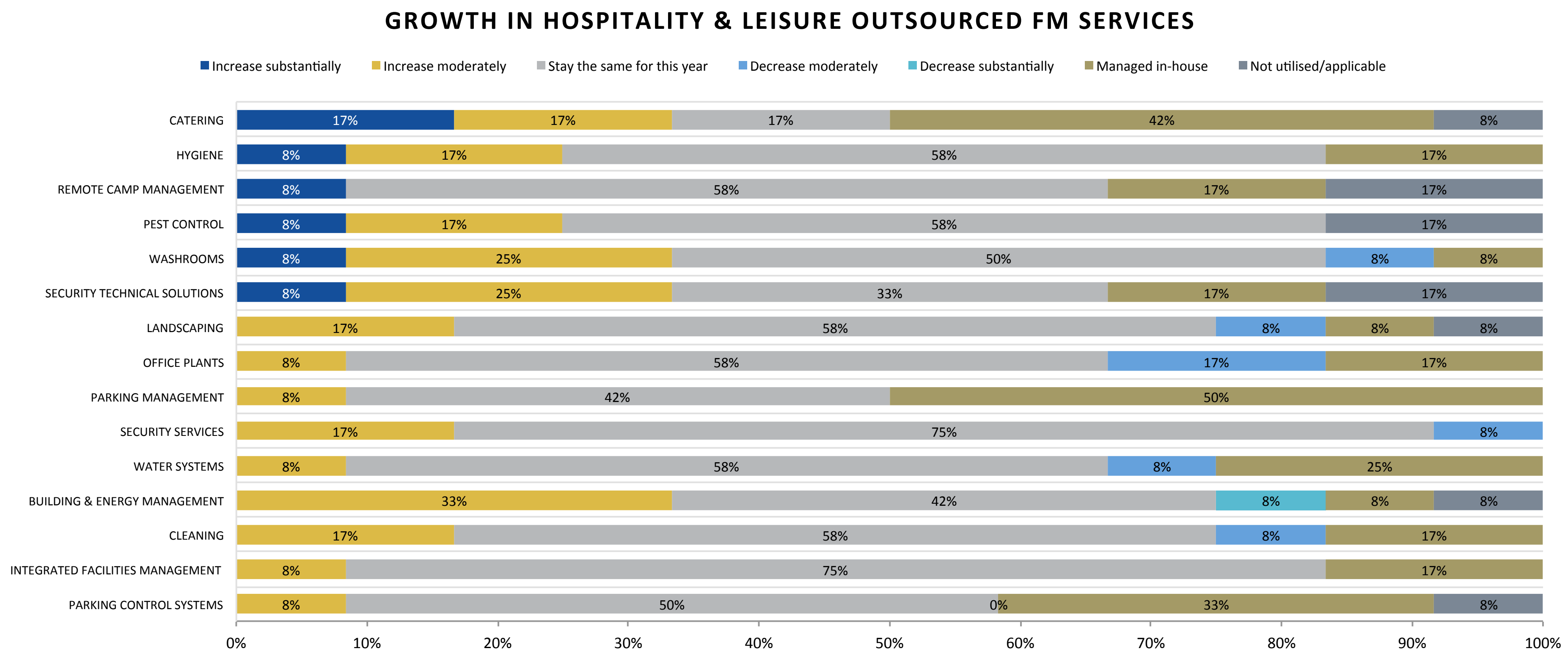
GROWTH IN HEALTHCARE & MEDICAL OUTSOURCED FM SERVICES



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.

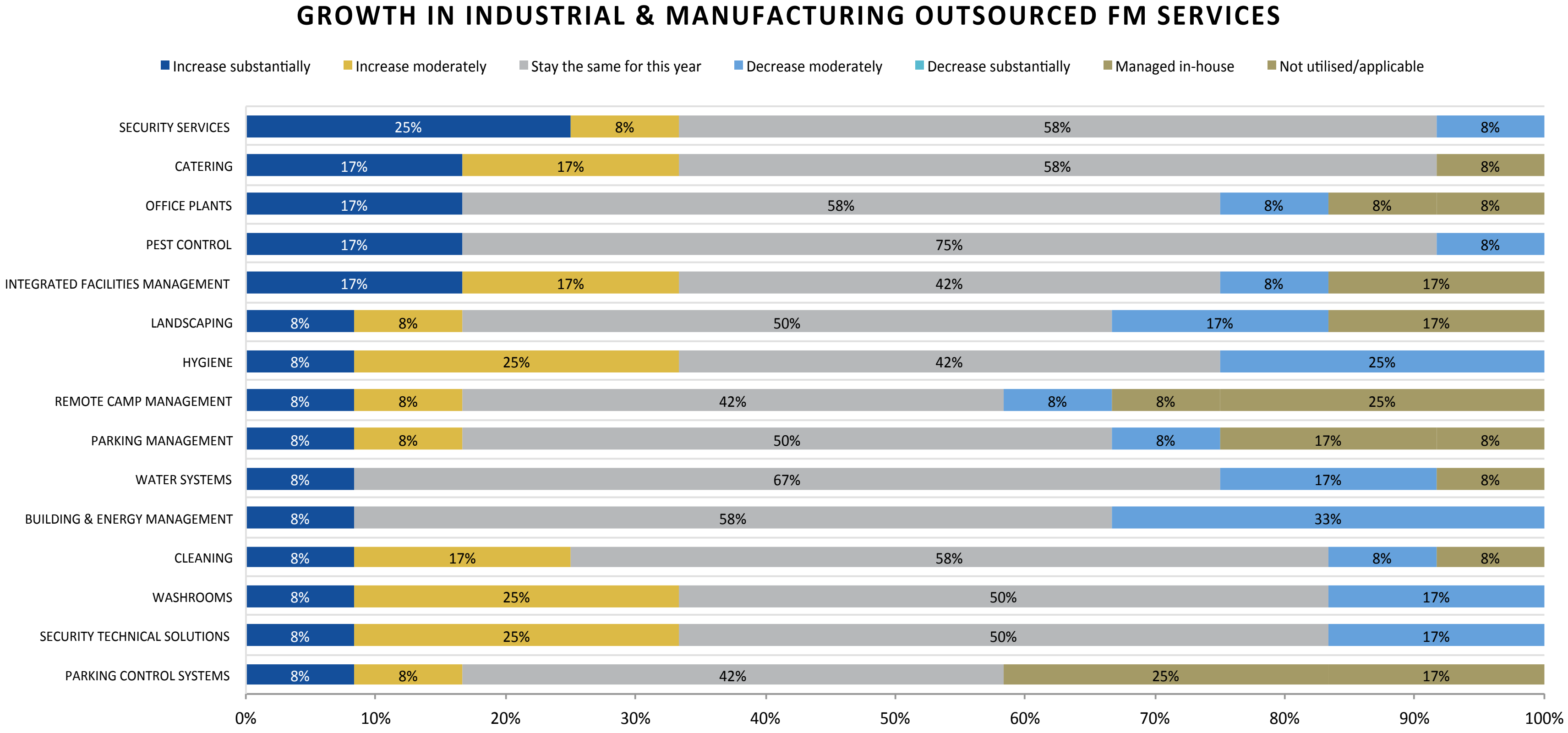
VERTICAL INDUSTRY GROWTH: FM SERVICES



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.

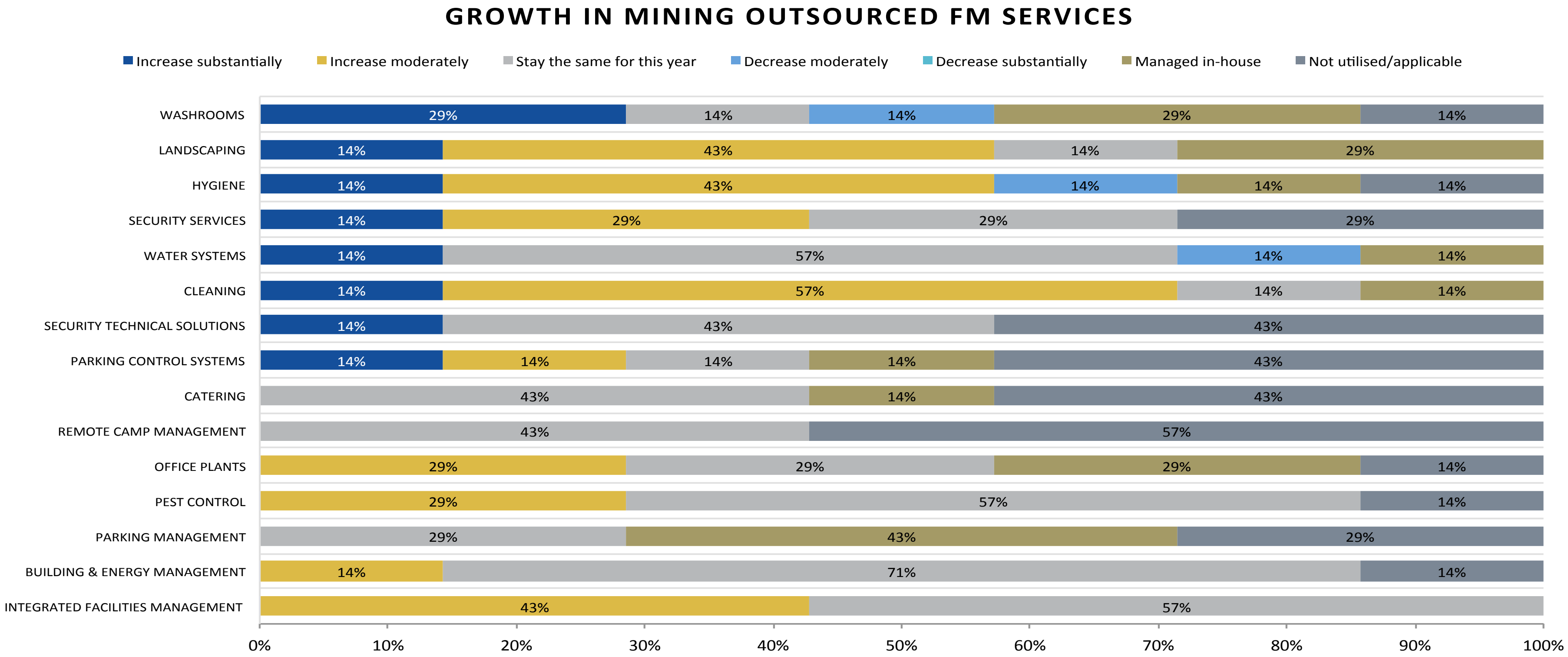
VERTICAL INDUSTRY GROWTH: FM SERVICES



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.

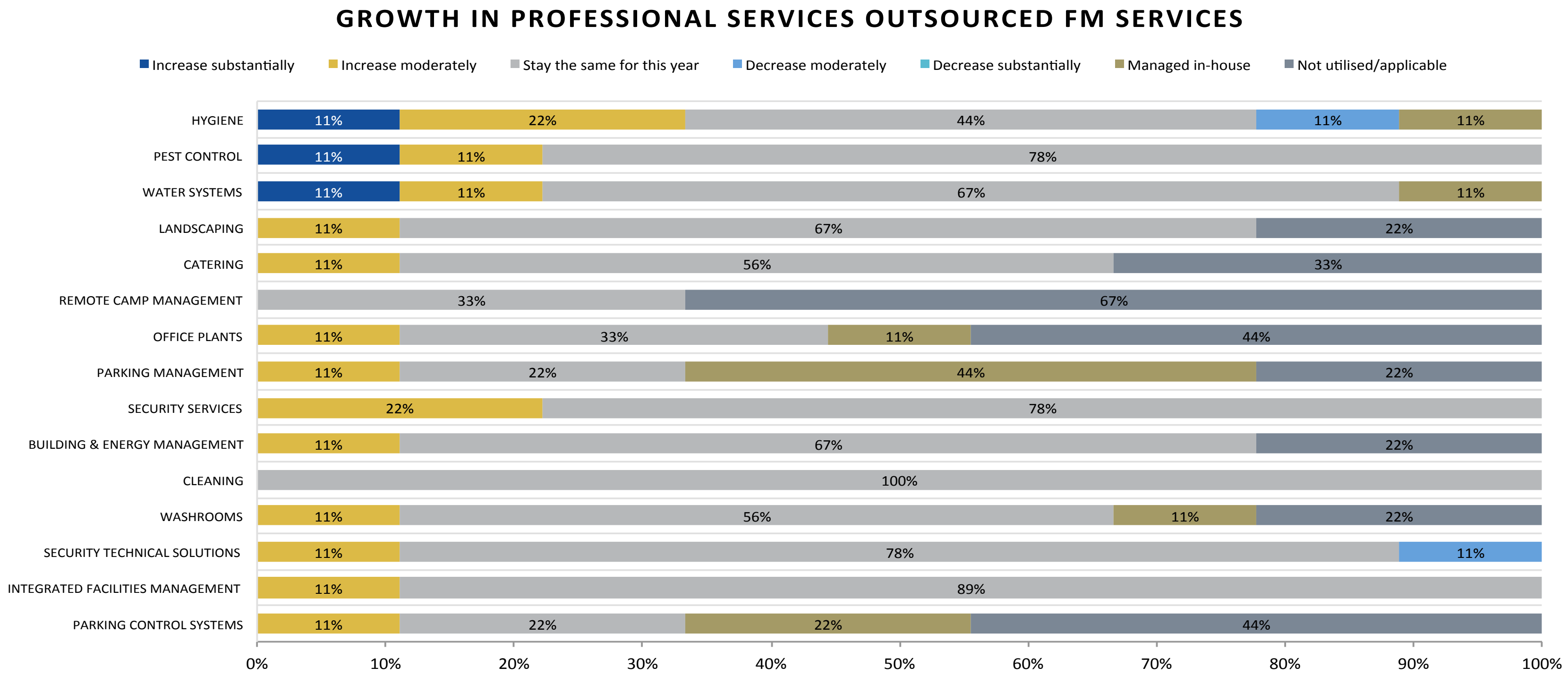
VERTICAL INDUSTRY GROWTH: FM SERVICES



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.

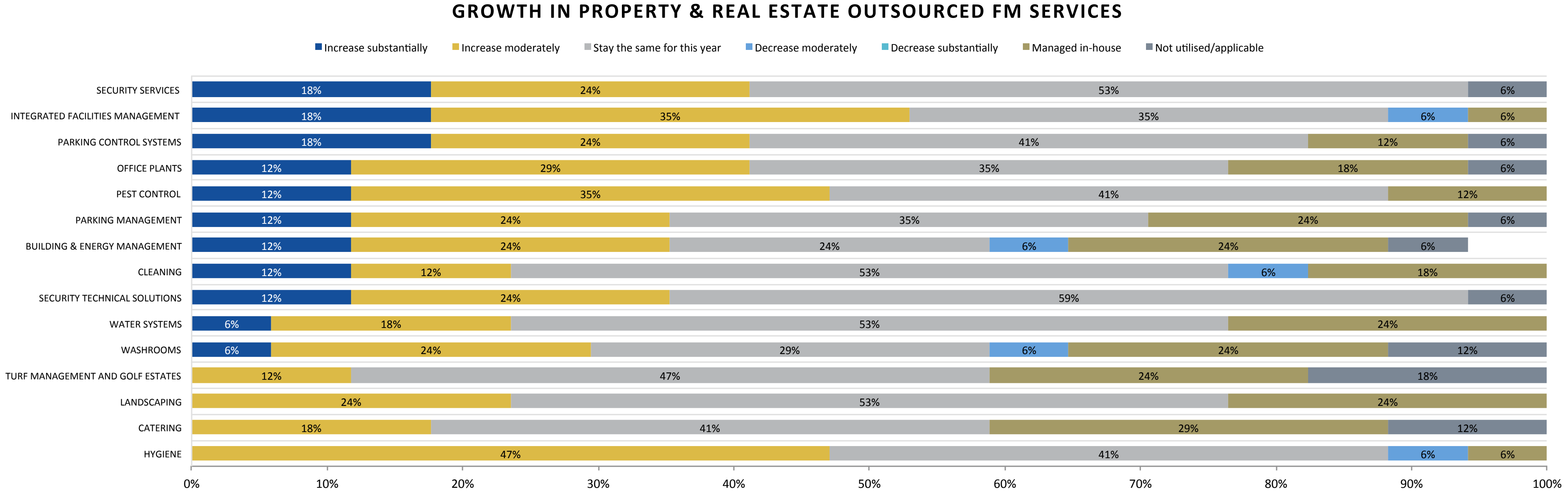
VERTICAL INDUSTRY GROWTH: FM SERVICES



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.

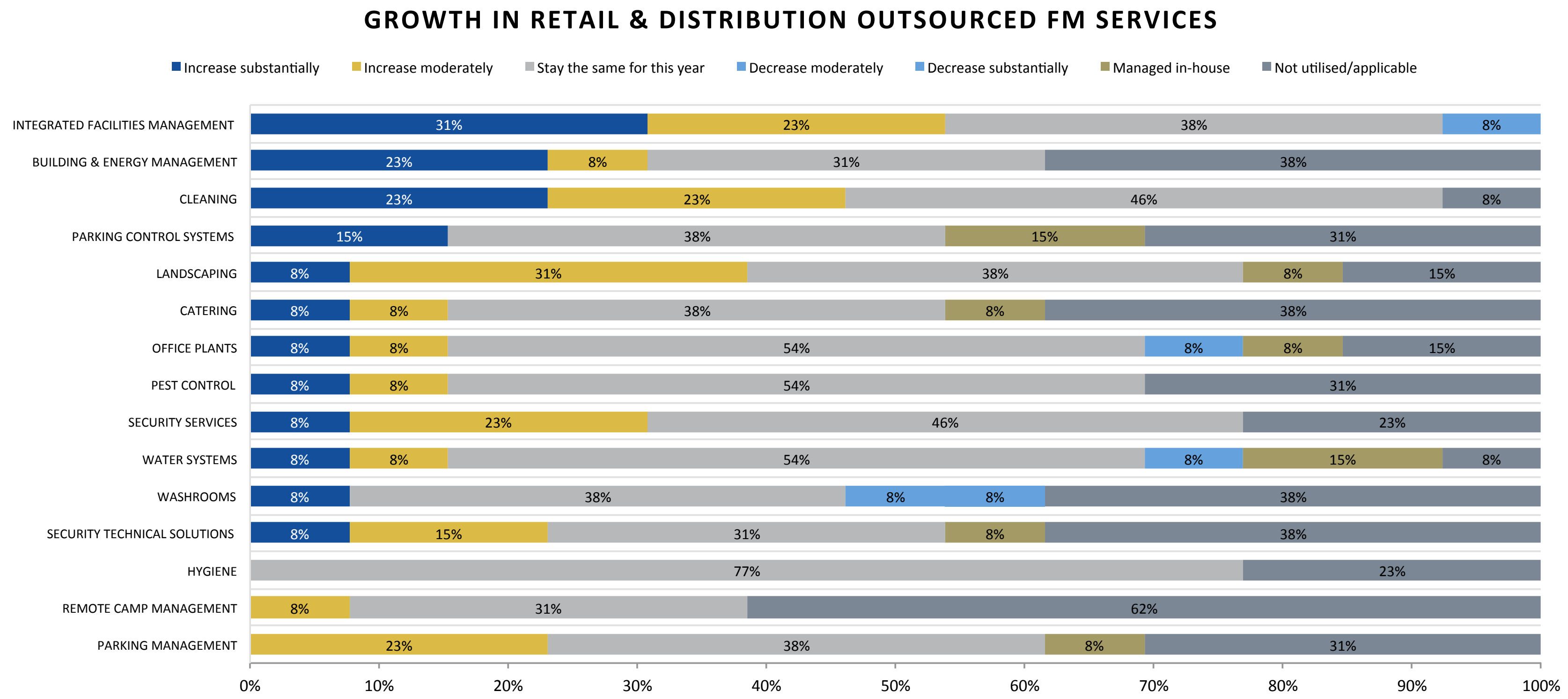
VERTICAL INDUSTRY GROWTH: FM SERVICES



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.

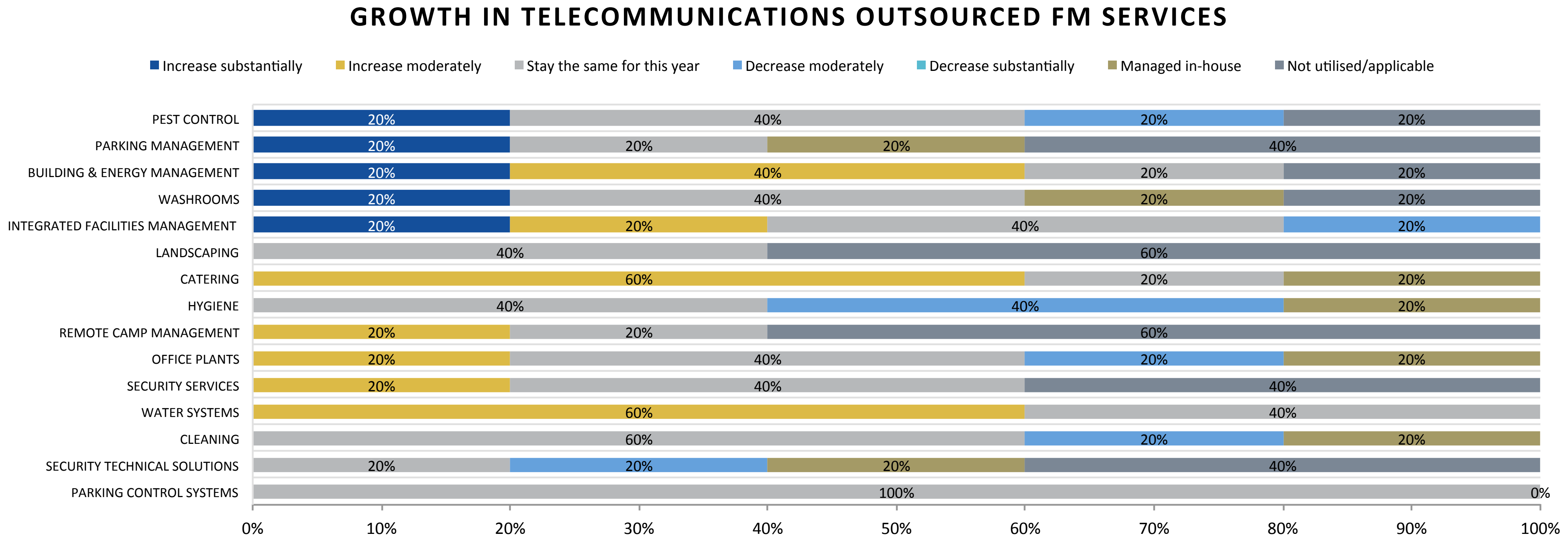
VERTICAL INDUSTRY GROWTH: FM SERVICES



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.

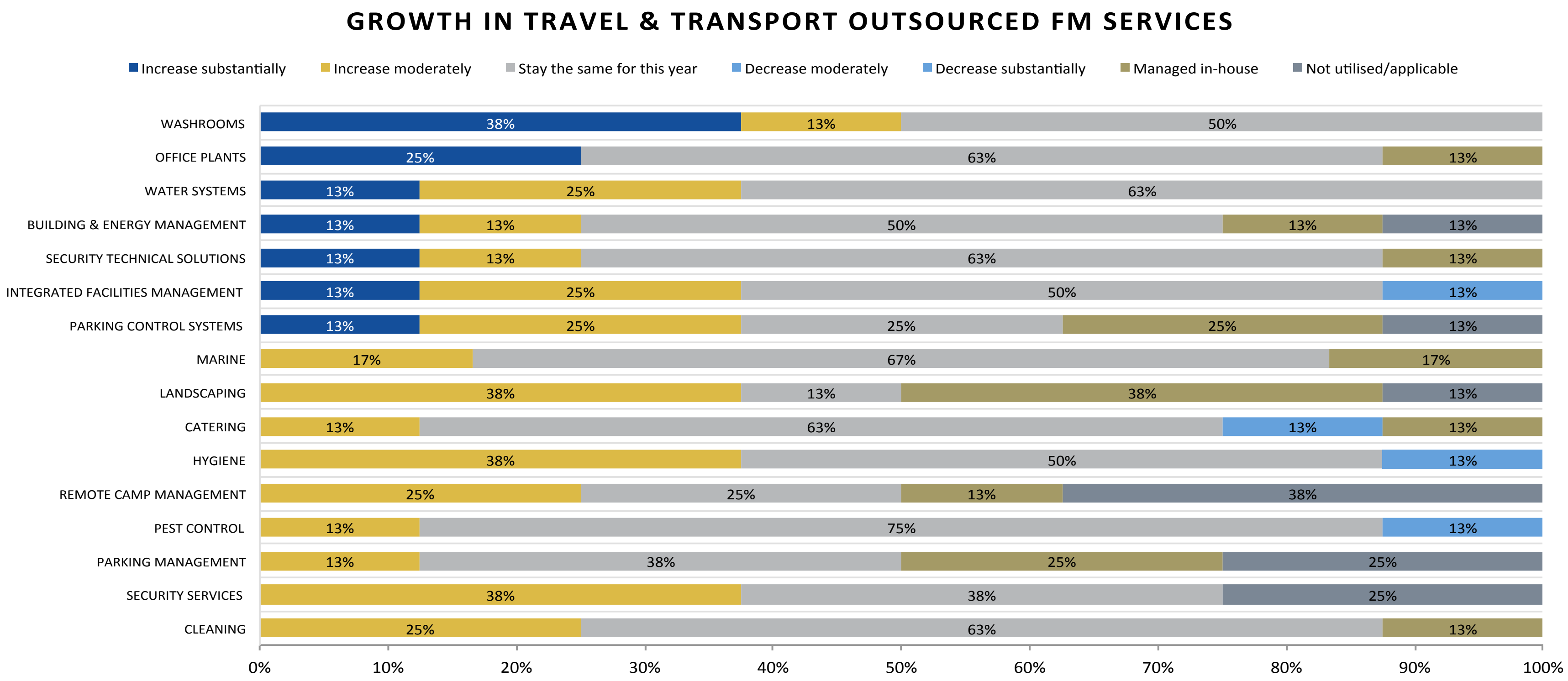
VERTICAL INDUSTRY GROWTH: FM SERVICES



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.

VERTICAL INDUSTRY GROWTH: FM SERVICES



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

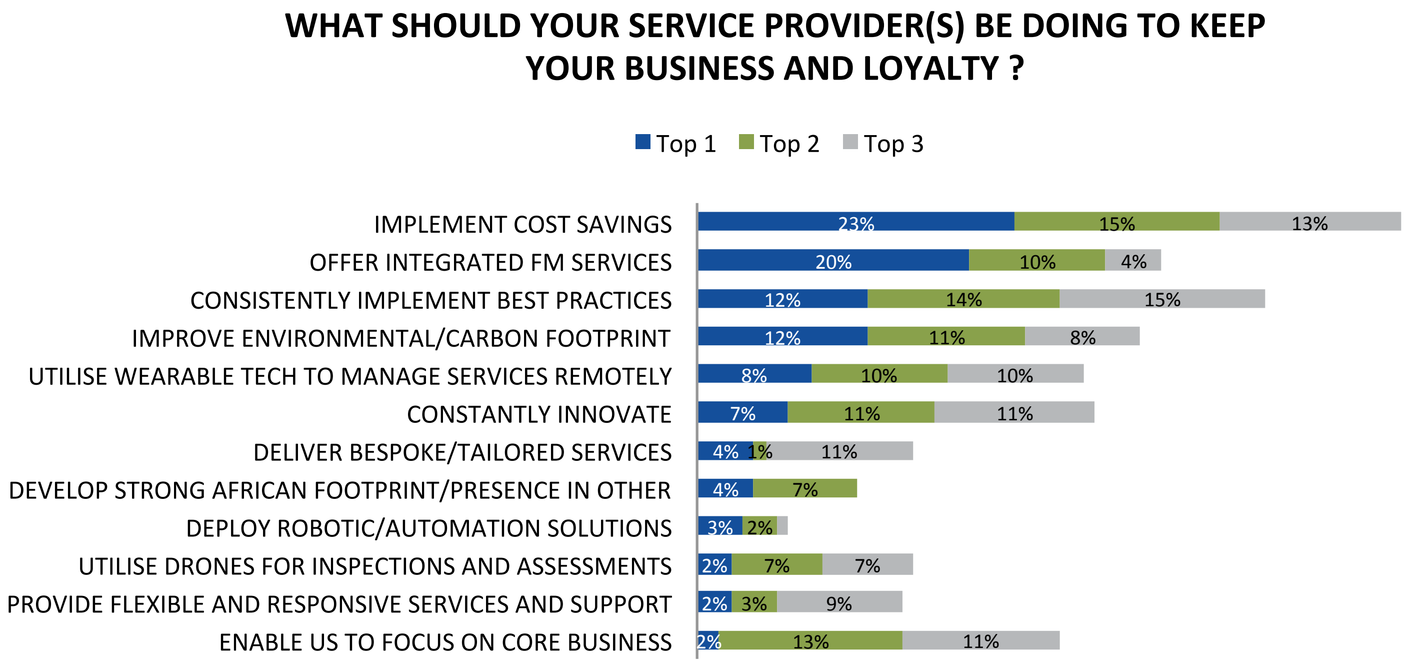
Travel and transport operators have indicated that they will grow outsourced activities for Washrooms, Office Plants, Water Systems, Parking Control Systems, Security Technical Solutions, Integrated Facilities Management and Building Management Systems & Energy Solutions substantially to moderately over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

VERTICAL INDUSTRY BUSINESS REQUIREMENTS

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.



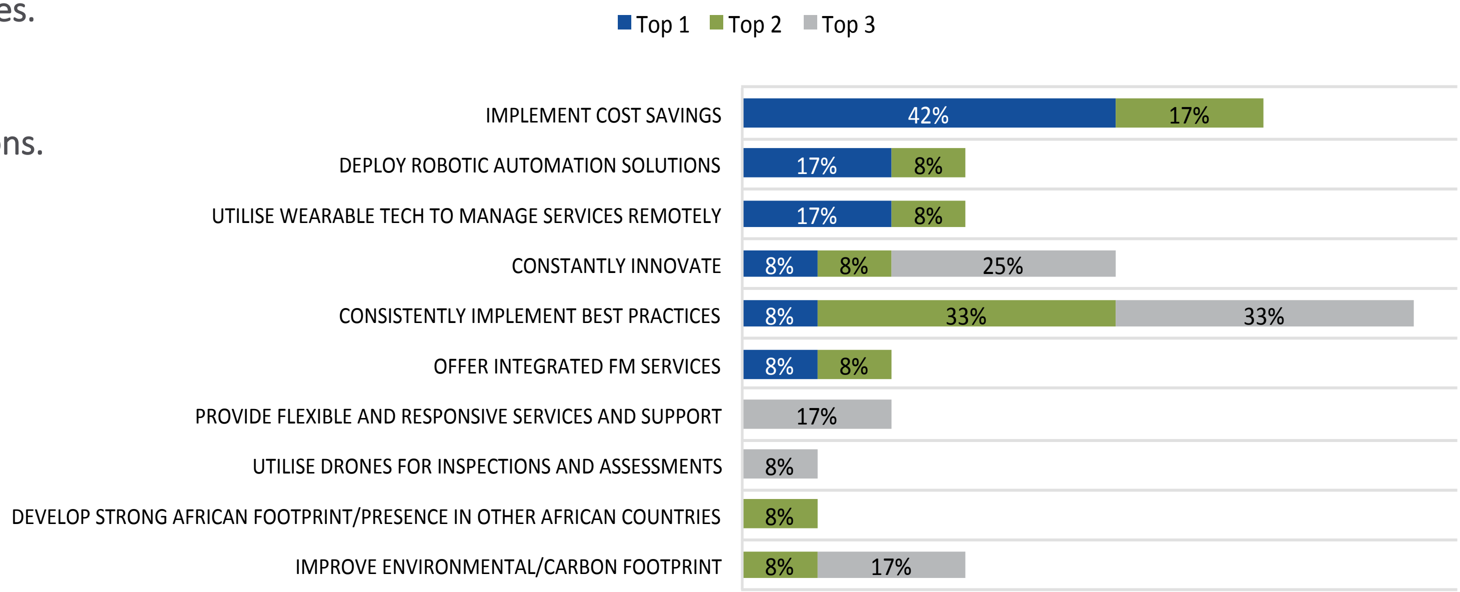
VERTICAL INDUSTRY BUSINESS REQUIREMENTS

Banking, Financial Services & Insurance:

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

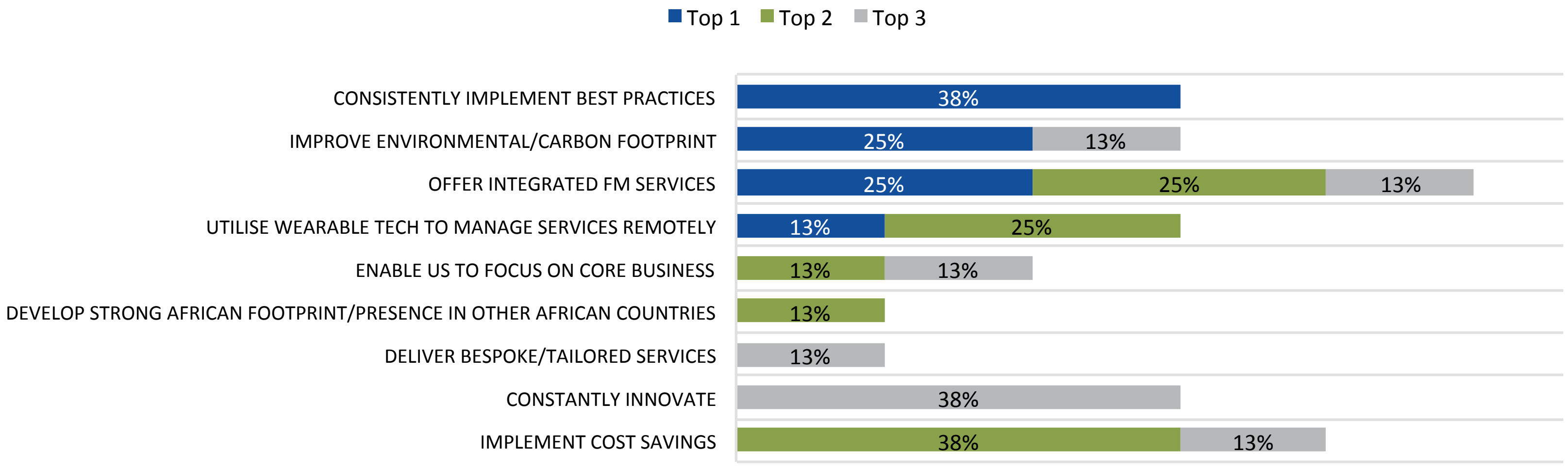
1. Continue to implement cost savings.
2. Consistently implement best practices.
3. Constantly innovate.
4. Offer integrated FM Services.
5. Deploy robotic or automated solutions.

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



VERTICAL INDUSTRY BUSINESS REQUIREMENTS

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



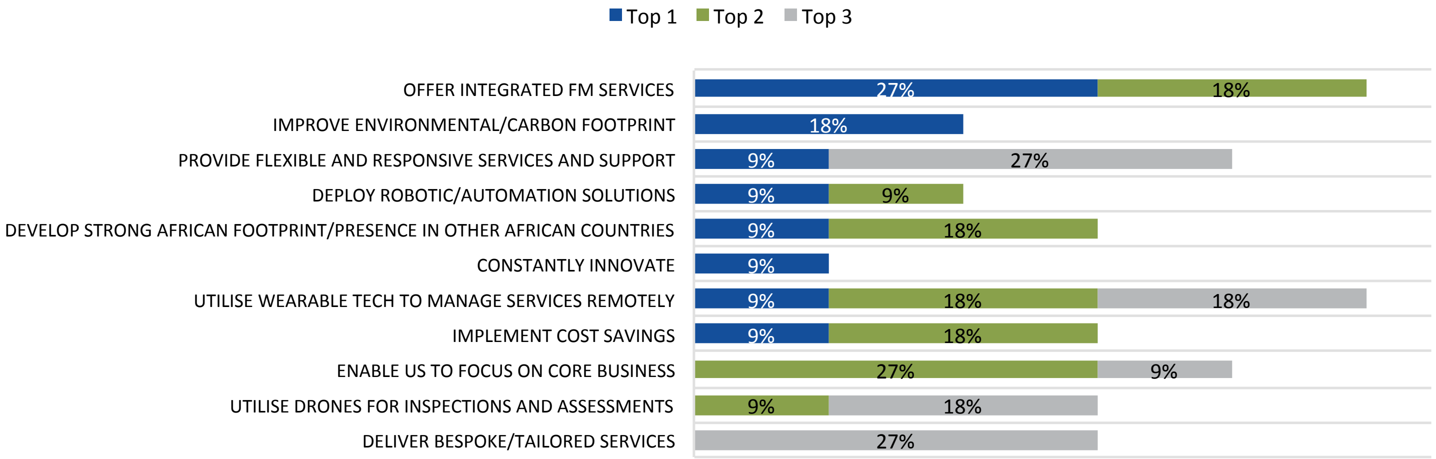
Education:

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

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

VERTICAL INDUSTRY BUSINESS REQUIREMENTS

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



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.

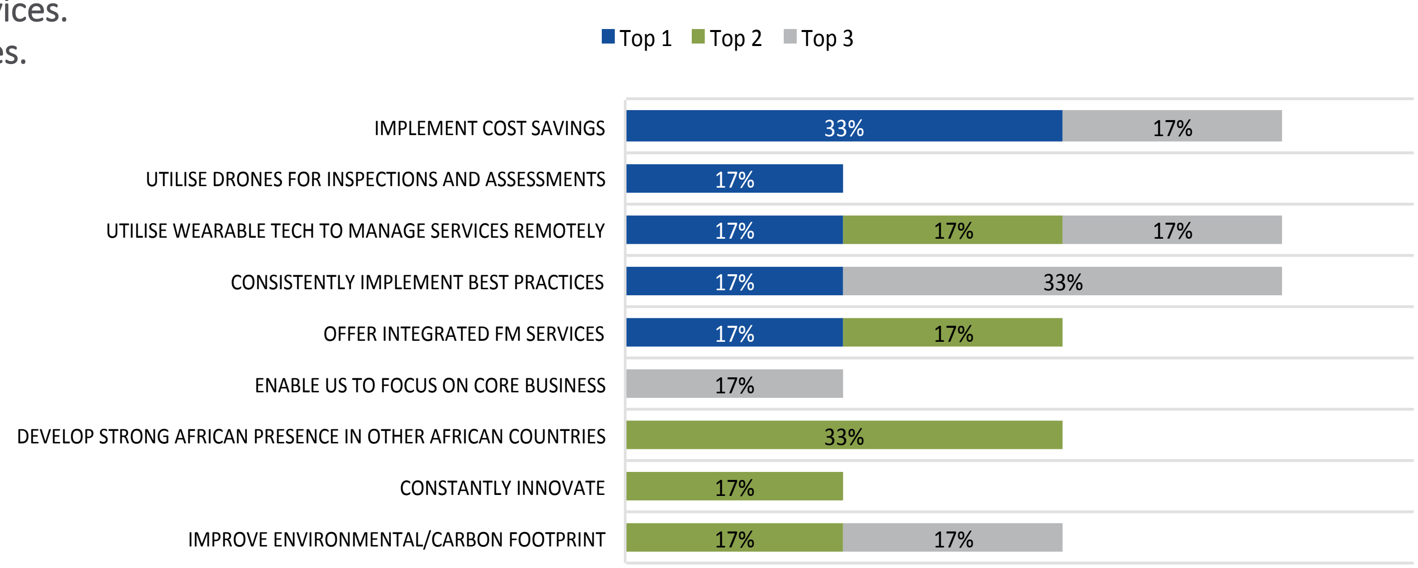
VERTICAL INDUSTRY BUSINESS REQUIREMENTS

Healthcare & Medical:

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

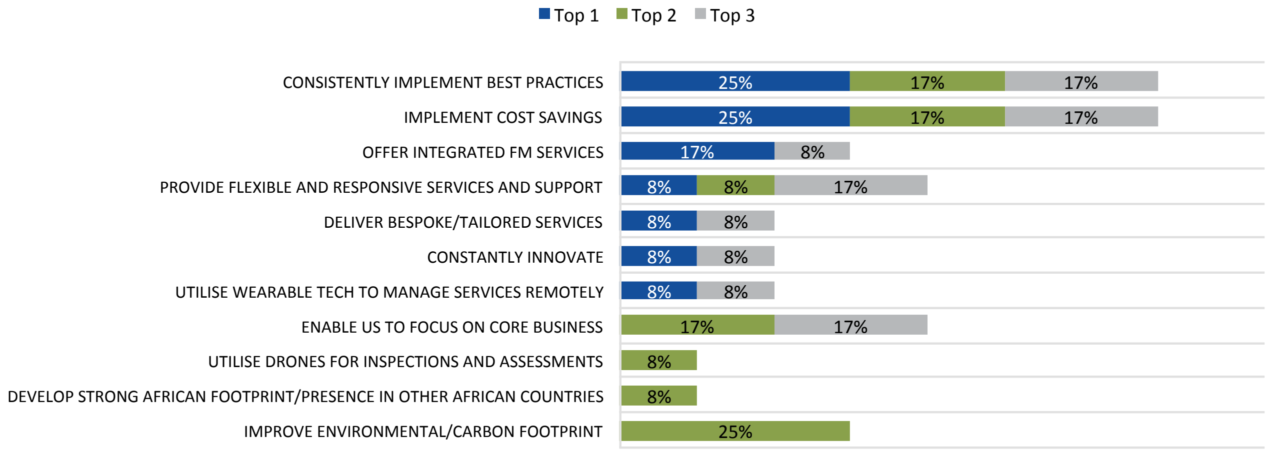
1. Continue to implement cost savings.
2. Utilise wearable tech to manage services.
3. Consistently implement best practices.
4. Offer integrated FM Services.
5. Utilise drones for inspections and assessments.

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



VERTICAL INDUSTRY BUSINESS REQUIREMENTS

WHAT SHOULD HOSPITALITY & LEISURE FM SERVICE PROVIDER(S) BE DOING TO KEEP YOUR BUSINESS AND LOYALTY?



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

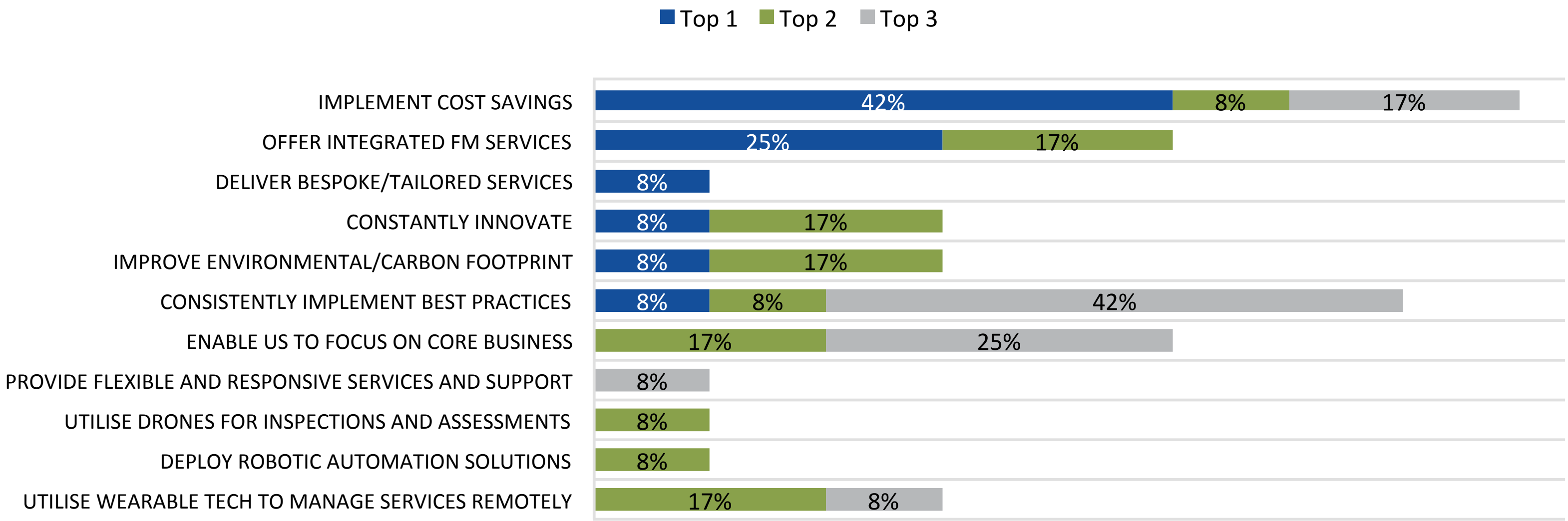
VERTICAL INDUSTRY BUSINESS REQUIREMENTS

Industrial & Manufacturing:

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

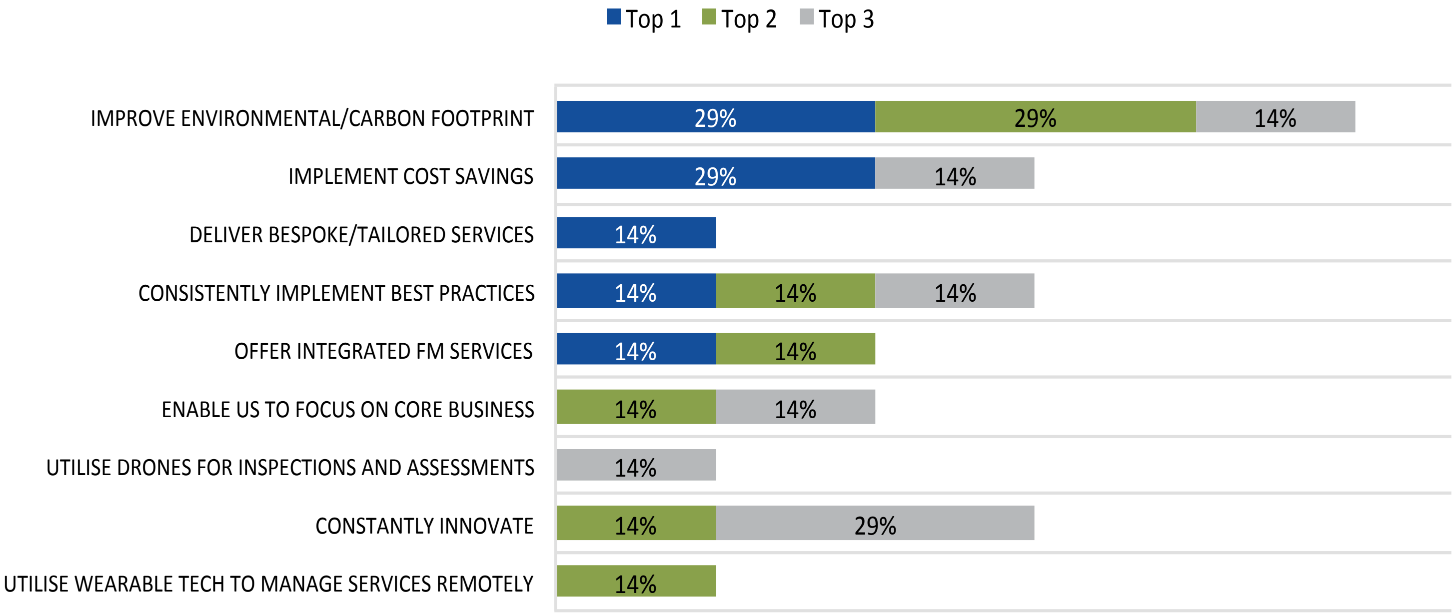
1. Continue to implement cost savings.
2. Offer integrated FM Services.
3. Consistently implement best practices.
4. Enable clients to focus on their core business.
5. Constantly innovate.

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



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.

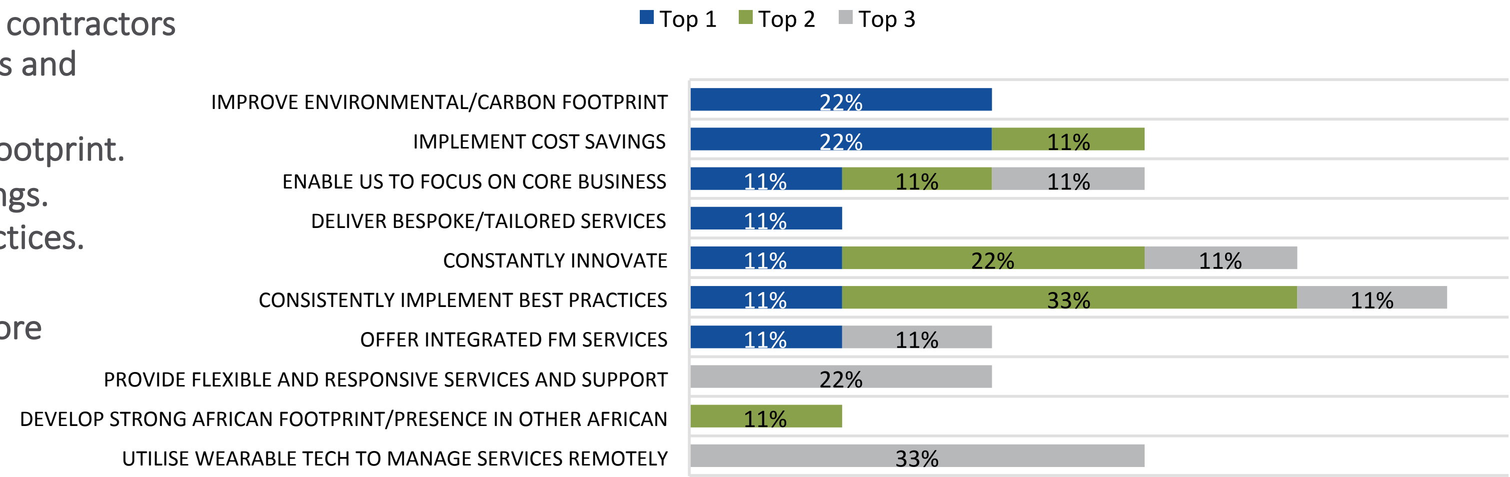
VERTICAL INDUSTRY BUSINESS REQUIREMENTS

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.

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



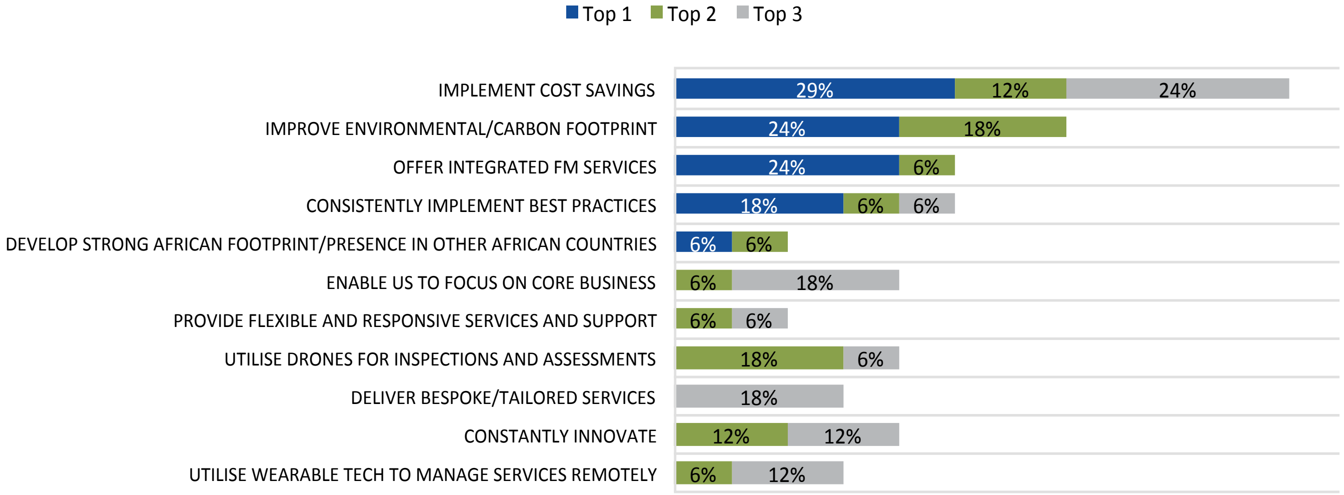
VERTICAL INDUSTRY BUSINESS REQUIREMENTS

Property & Real Estate:

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

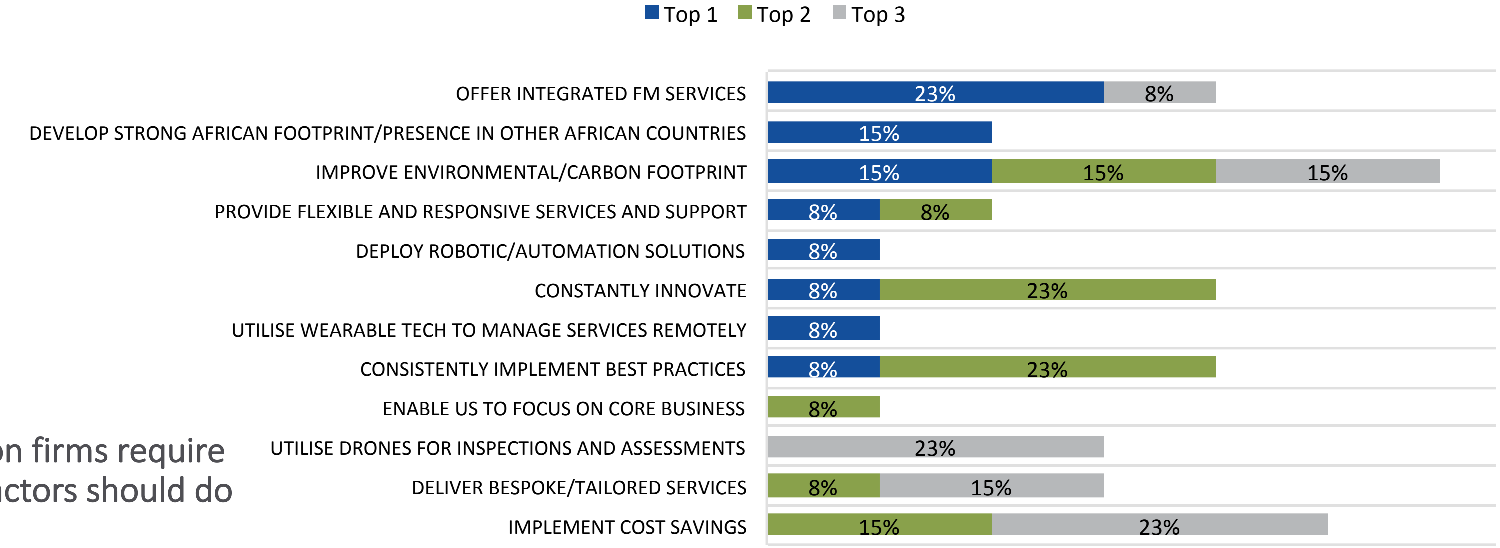
1. Continue to implement cost savings.
2. Improve environmental/carbon footprint.
3. Offer integrated FM Services.
4. Consistently implement best practices.
5. Enable clients to focus on their core business.

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



VERTICAL INDUSTRY BUSINESS REQUIREMENTS

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



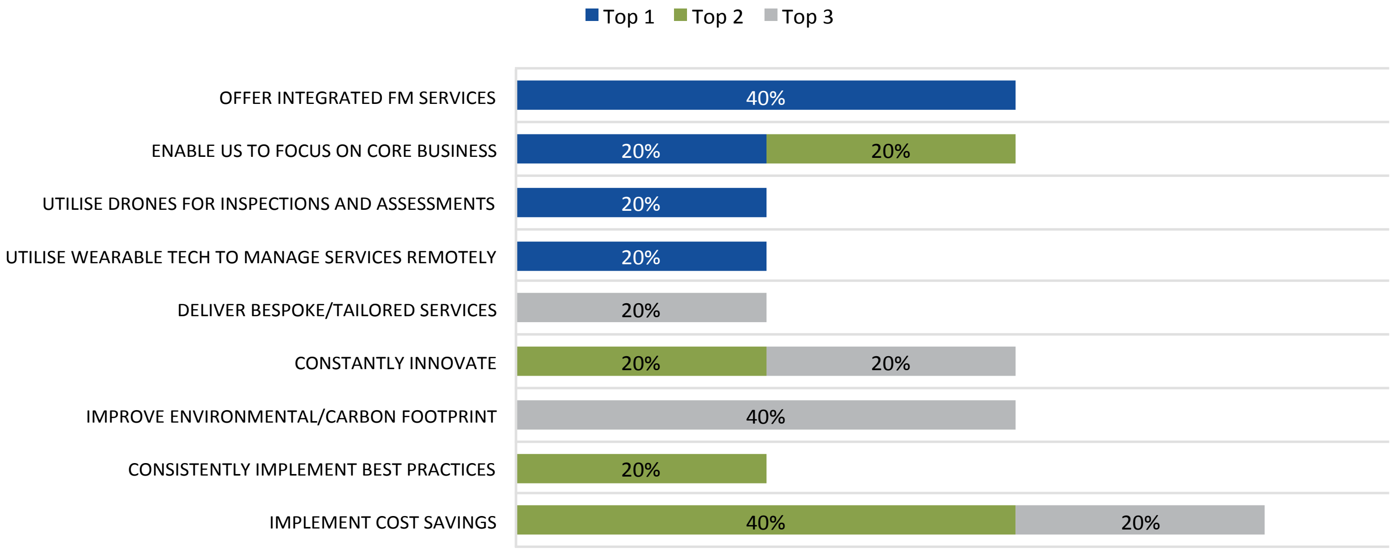
Retail & Distribution:

Retailers, wholesalers and distribution firms require that FM service providers and contractors should do the following to keep their business:

1. Offer integrated FM Services.
2. Improve environmental/carbon footprint.
3. Develop strong African footprints in other African countries.
4. Constantly innovate.
5. Consistently implement best practices.

VERTICAL INDUSTRY BUSINESS REQUIREMENTS

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



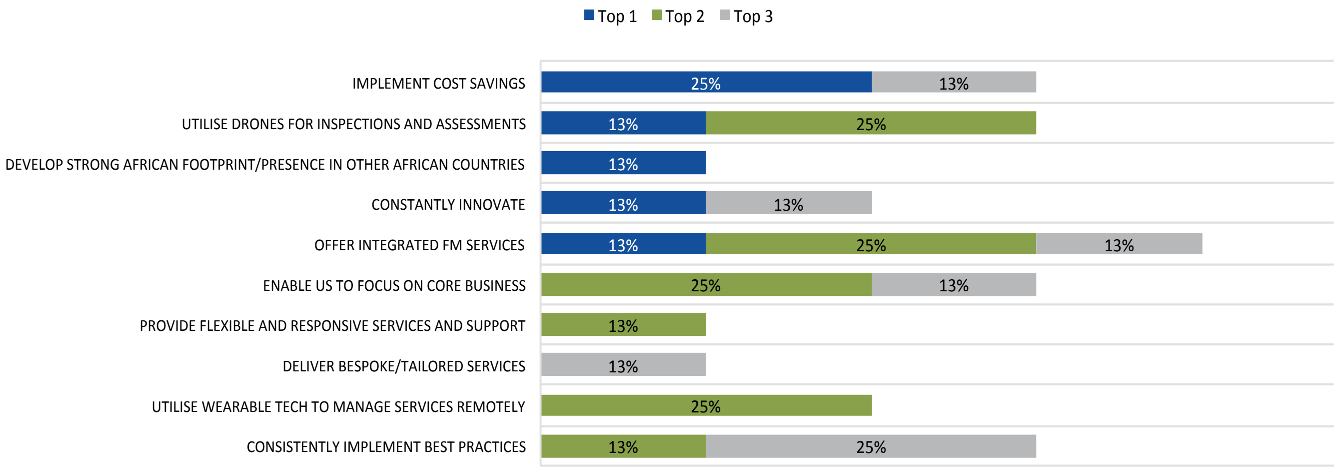
Telecommunications:

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

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

VERTICAL INDUSTRY BUSINESS REQUIREMENTS

WHAT FM TRAVEL & TRANSPORTATION SERVICE PROVIDER(S) BE DOING TO KEEP YOUR BUSINESS AND LOYALTY?



Travel & Transportation:

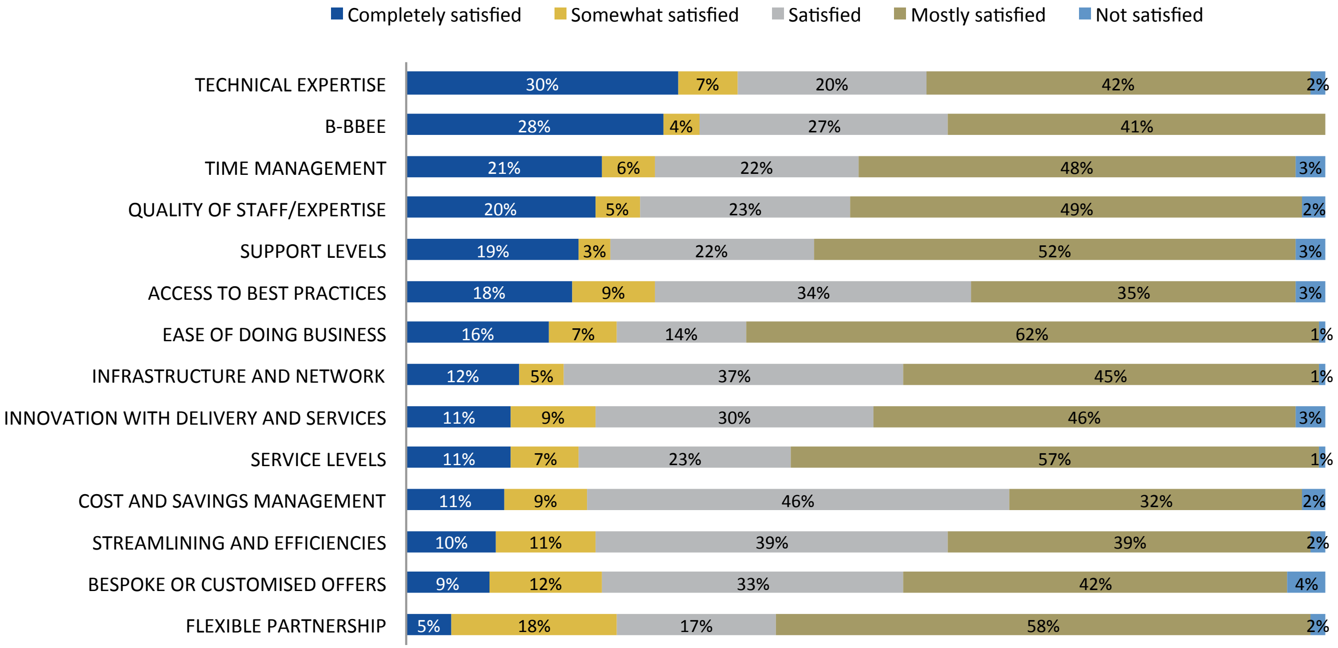
To retain the business of Travel & Transportation end-users and clients, FM service providers and contractors should:

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

FM SERVICE PROVIDER REQUIREMENTS

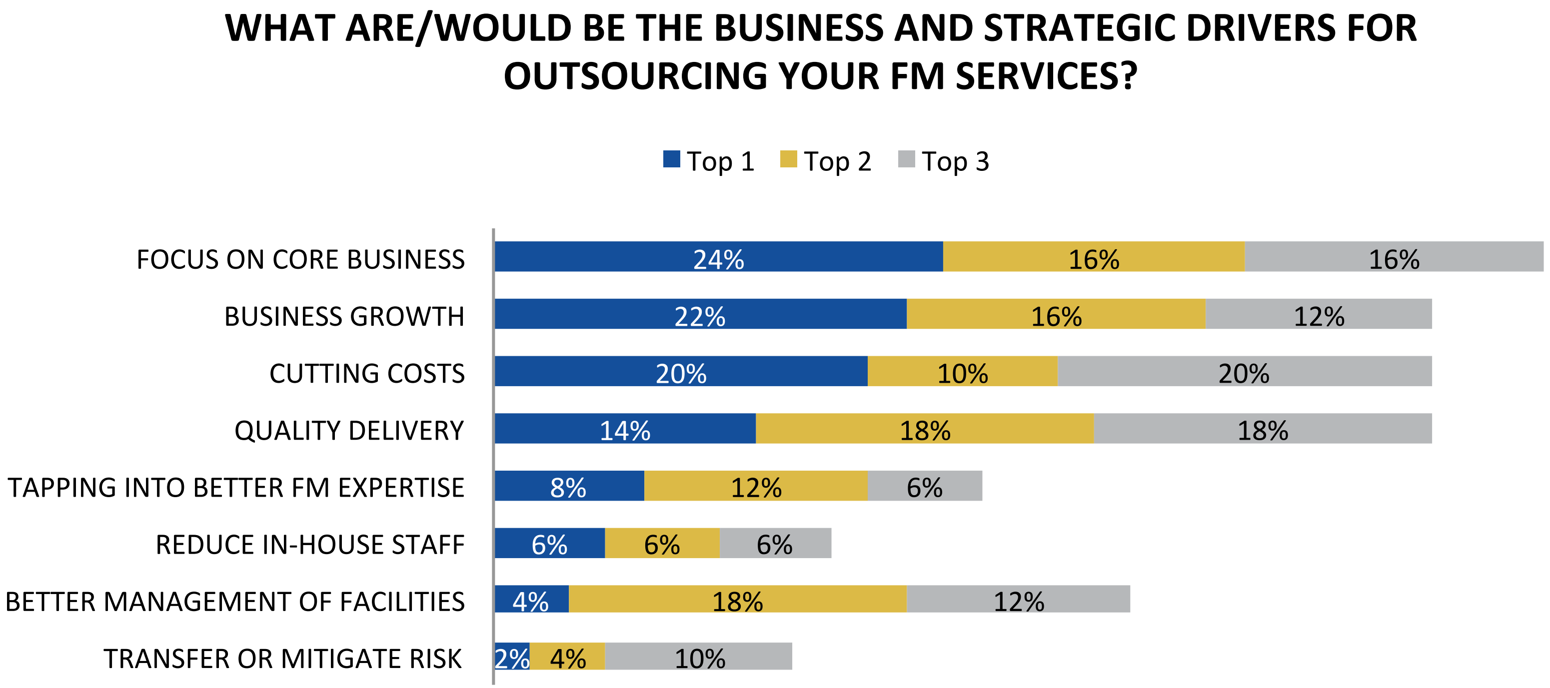
FM SERVICE PROVIDER REQUIREMENTS

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



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.

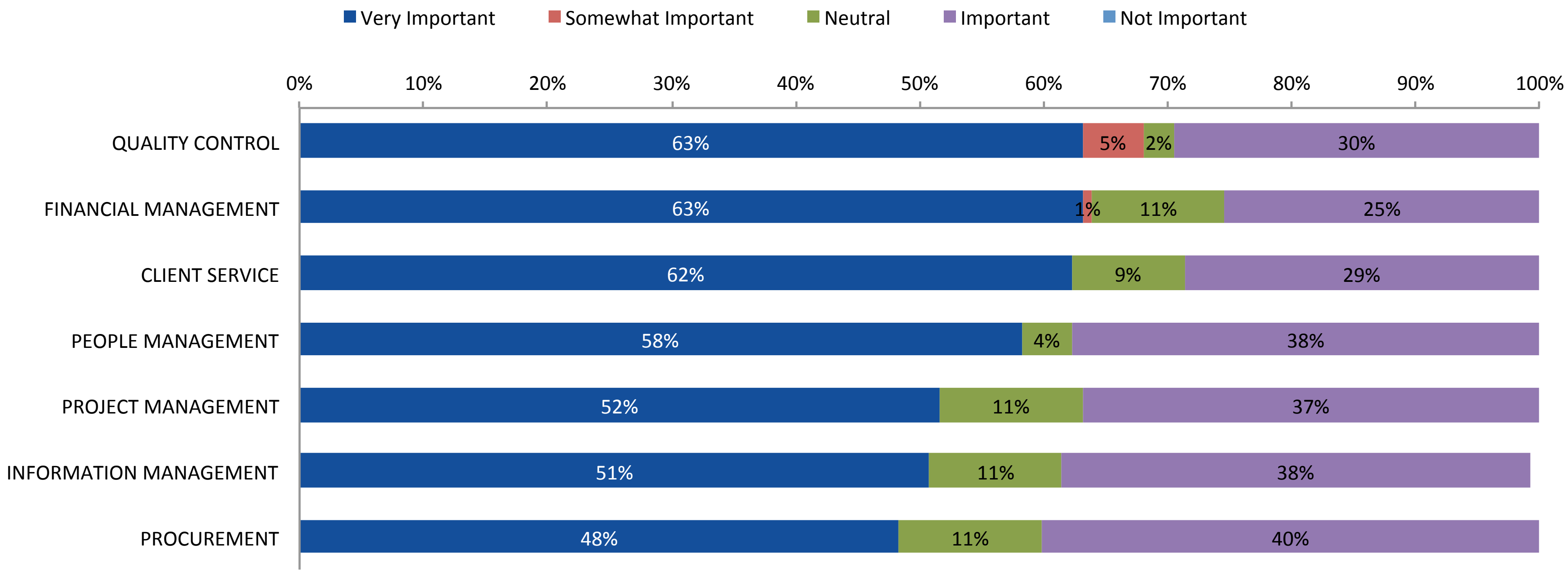
FM SERVICE PROVIDER REQUIREMENTS



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.

FM SERVICE PROVIDER REQUIREMENTS

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

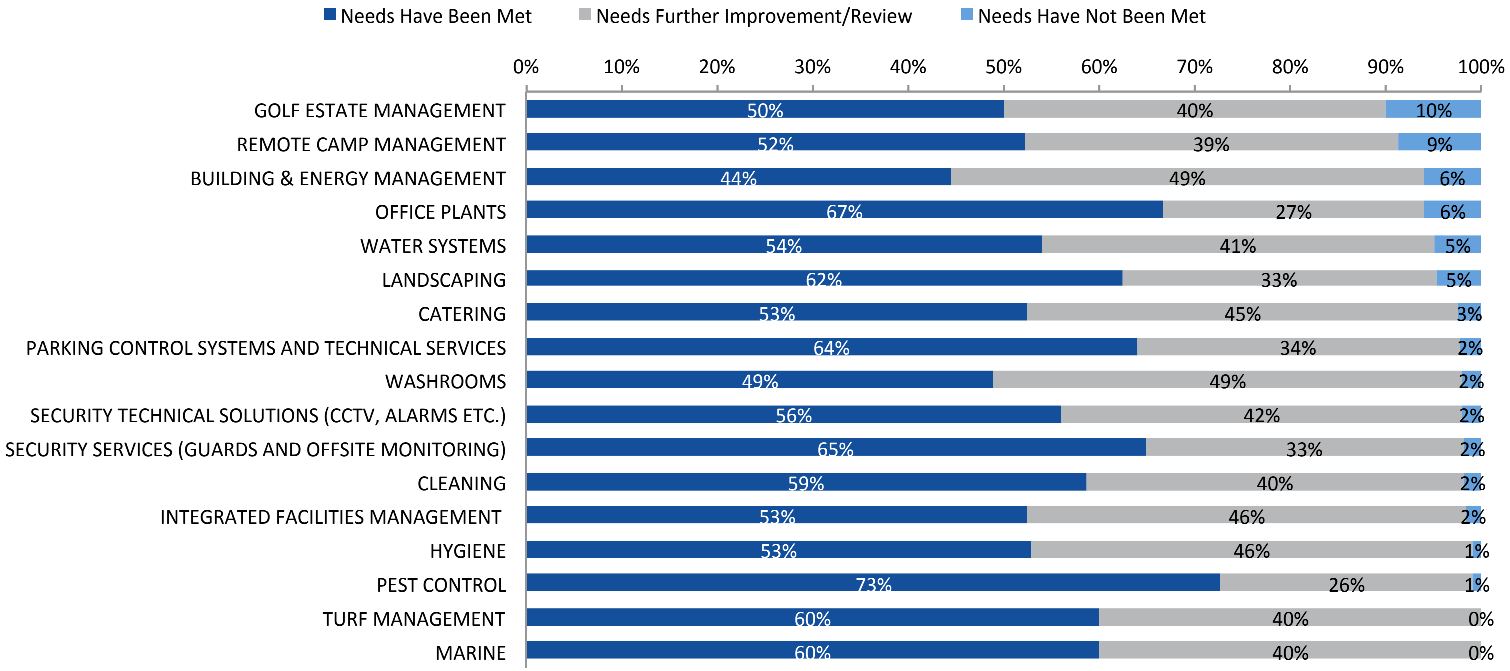


Quality Control, Financial Management and great Client Service are the top 3 most important attributes that end-users and clients look for in their FM service providers and contractors.

FM SERVICE PROVIDER REQUIREMENTS

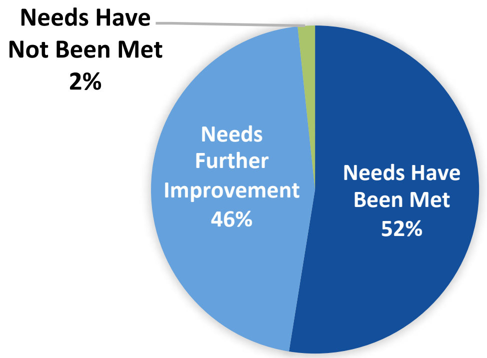
End-users or clients interviewed for the survey indicated that their needs are mostly being met (scoring over 60%) with Pest Control Services, Office Plants, Security Services, Parking Control Systems, Landscaping, Turf Management and Marine Transport Solutions. 10% of respondents for Golf Estates indicated 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?

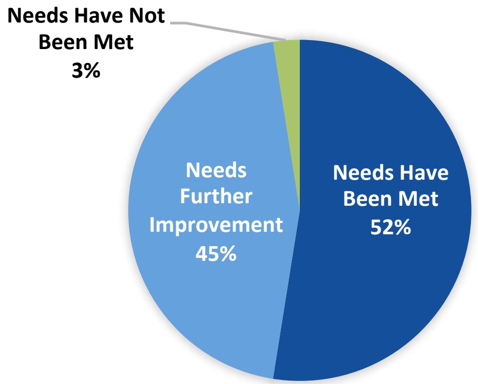


FM SERVICE PROVIDER REQUIREMENTS

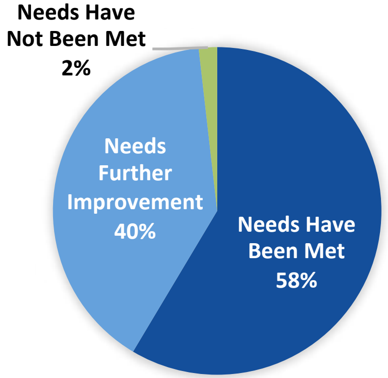
INTEGRATED FACILITIES MANAGEMENT



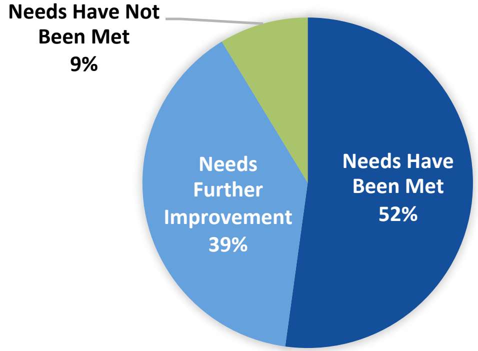
CATERING



CLEANING SERVICES

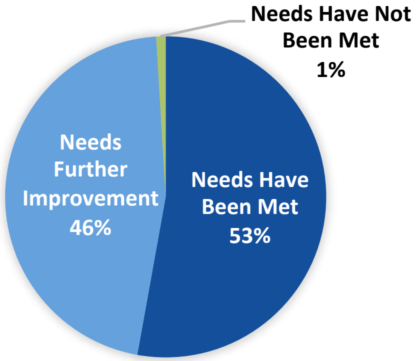


REMOTE CAMP MANAGEMENT

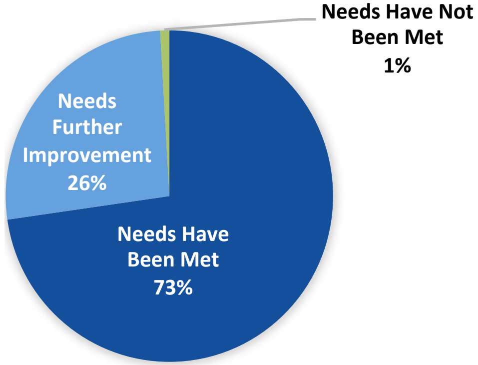


FM SERVICE PROVIDER REQUIREMENTS

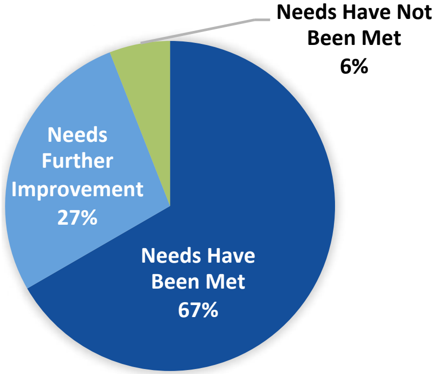
HYGIENE SERVICES



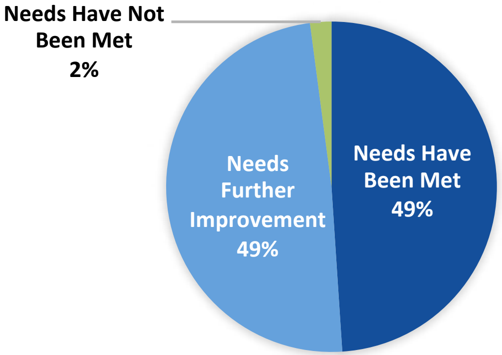
PEST CONTROL



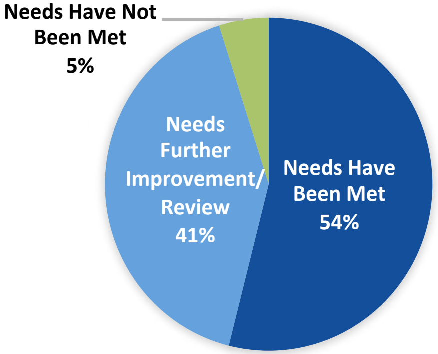
OFFICE PLANTS



WASHROOMS

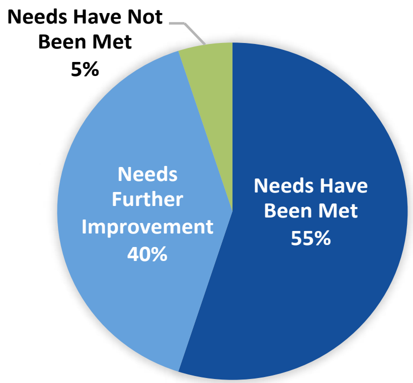


WATER SYSTEMS

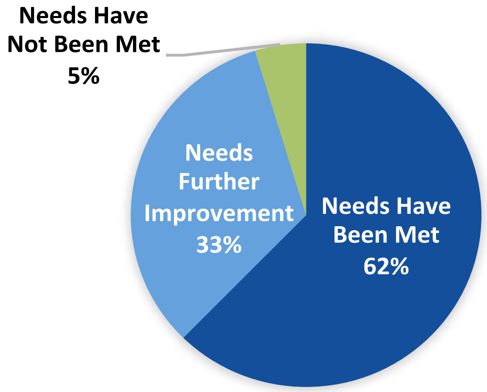


FM SERVICE PROVIDER REQUIREMENTS

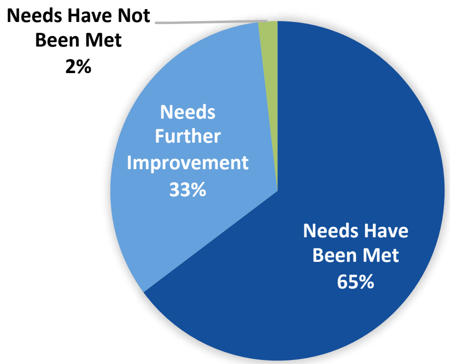
GOLF AND TURF MANAGEMENT



LANDSCAPING

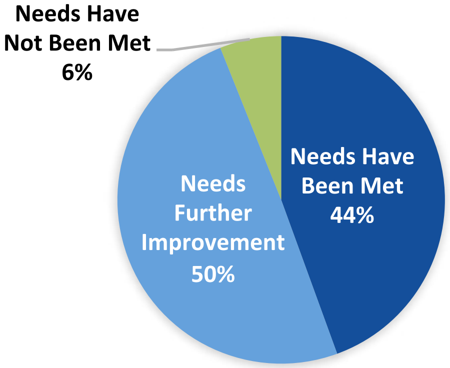


SECURITY SERVICES

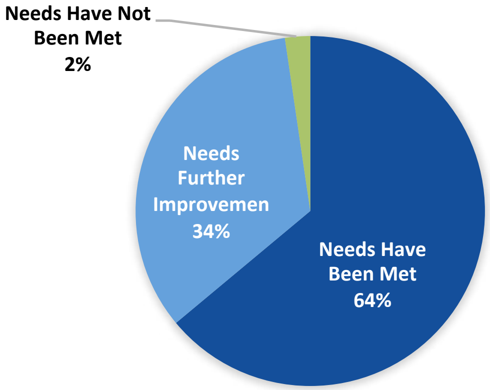


FM SERVICE PROVIDER REQUIREMENTS

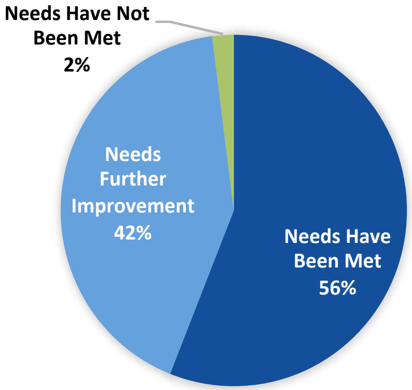
BUILDING MANAGEMENT SYSTEMS & ENERGY SOLUTIONS



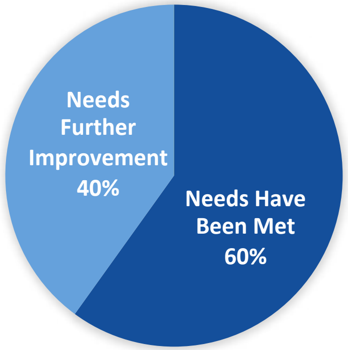
PARKING CONTROL SYSTEMS



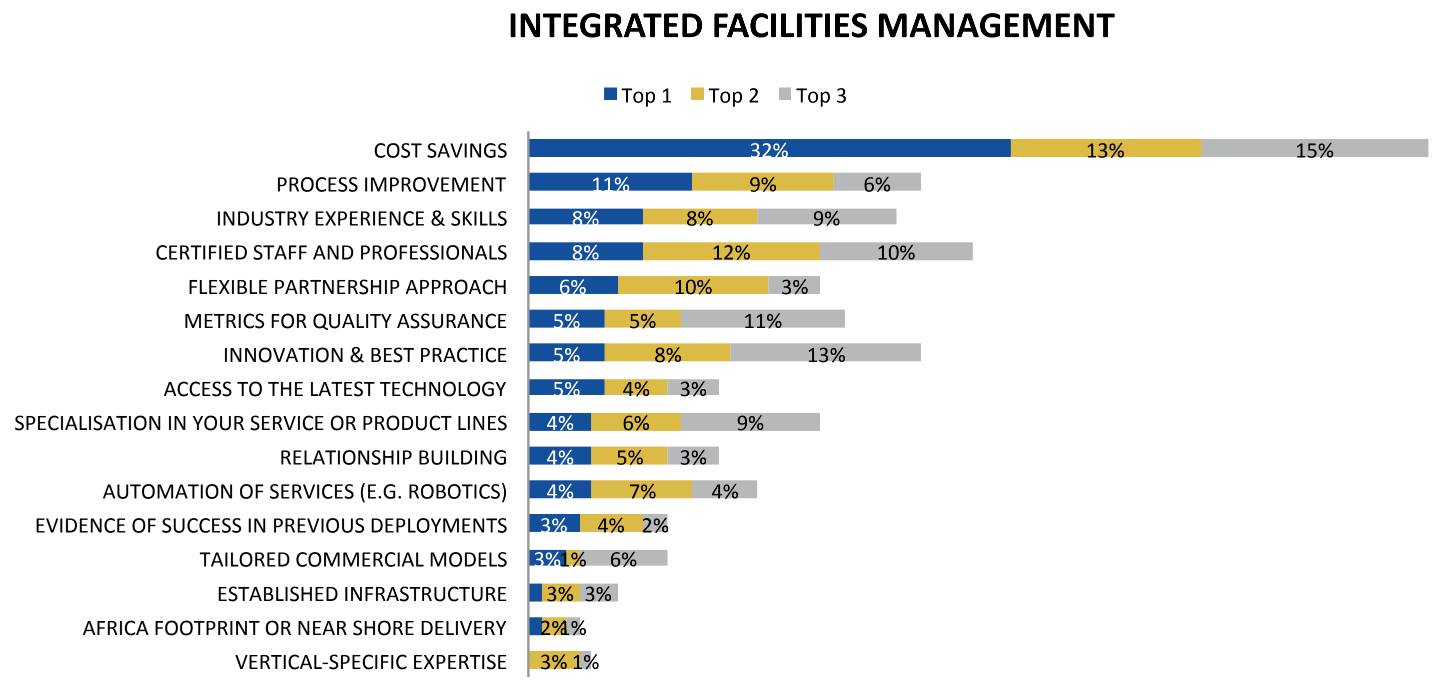
SECURITY TECHNICAL SOLUTIONS



MARINE TRANSPORT SOLUTIONS



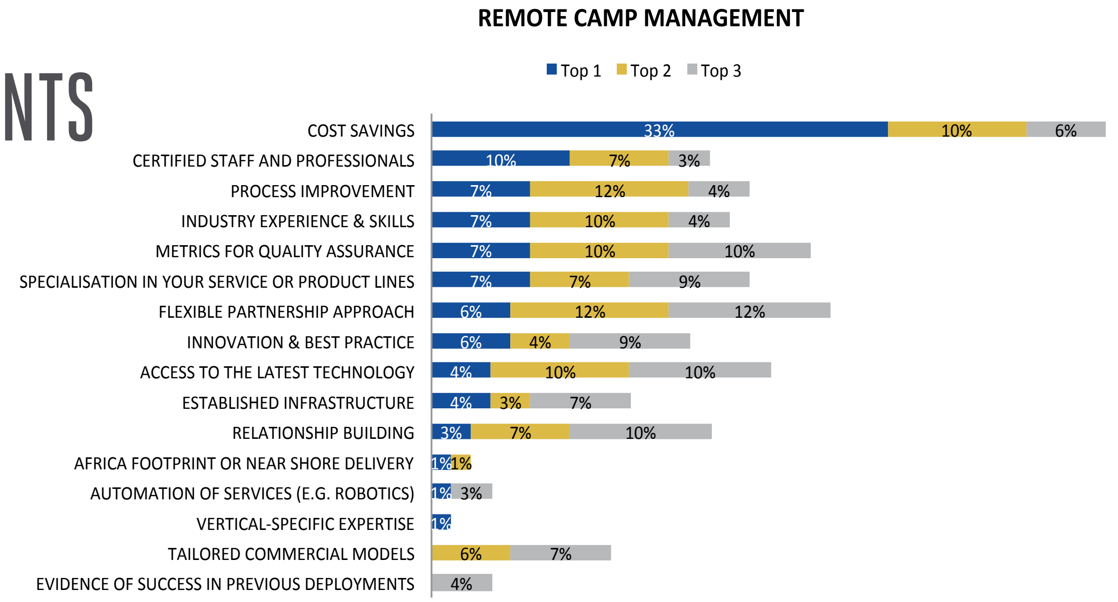
FM SERVICE PROVIDER REQUIREMENTS

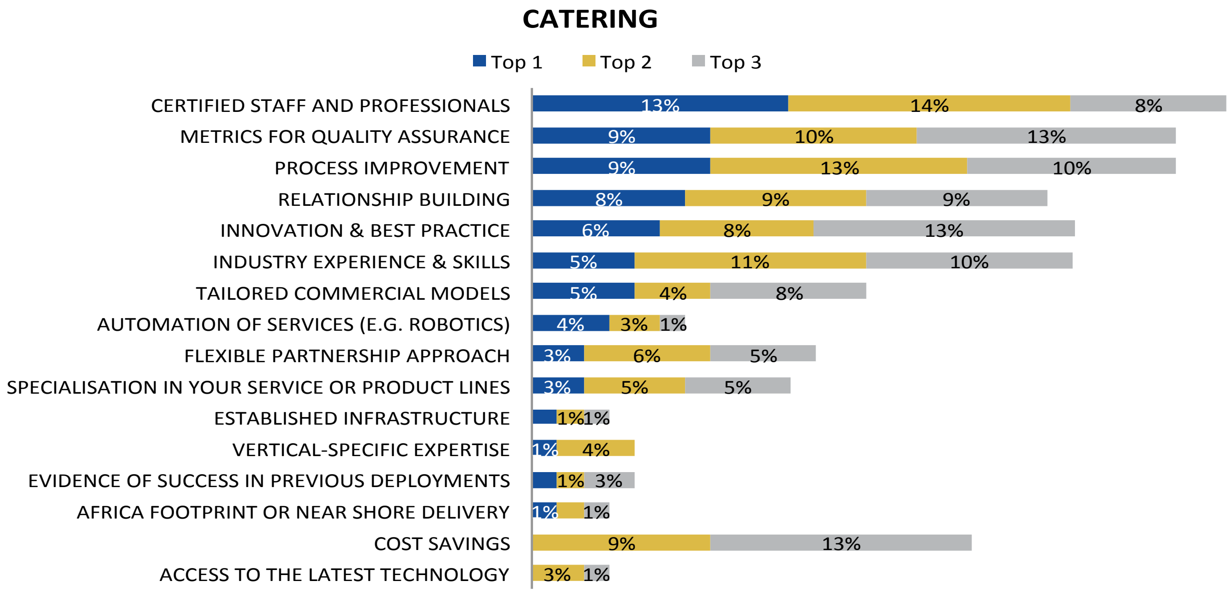


What criteria do you look for in your service provider(s)?

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.

FM SERVICE PROVIDER REQUIREMENTS



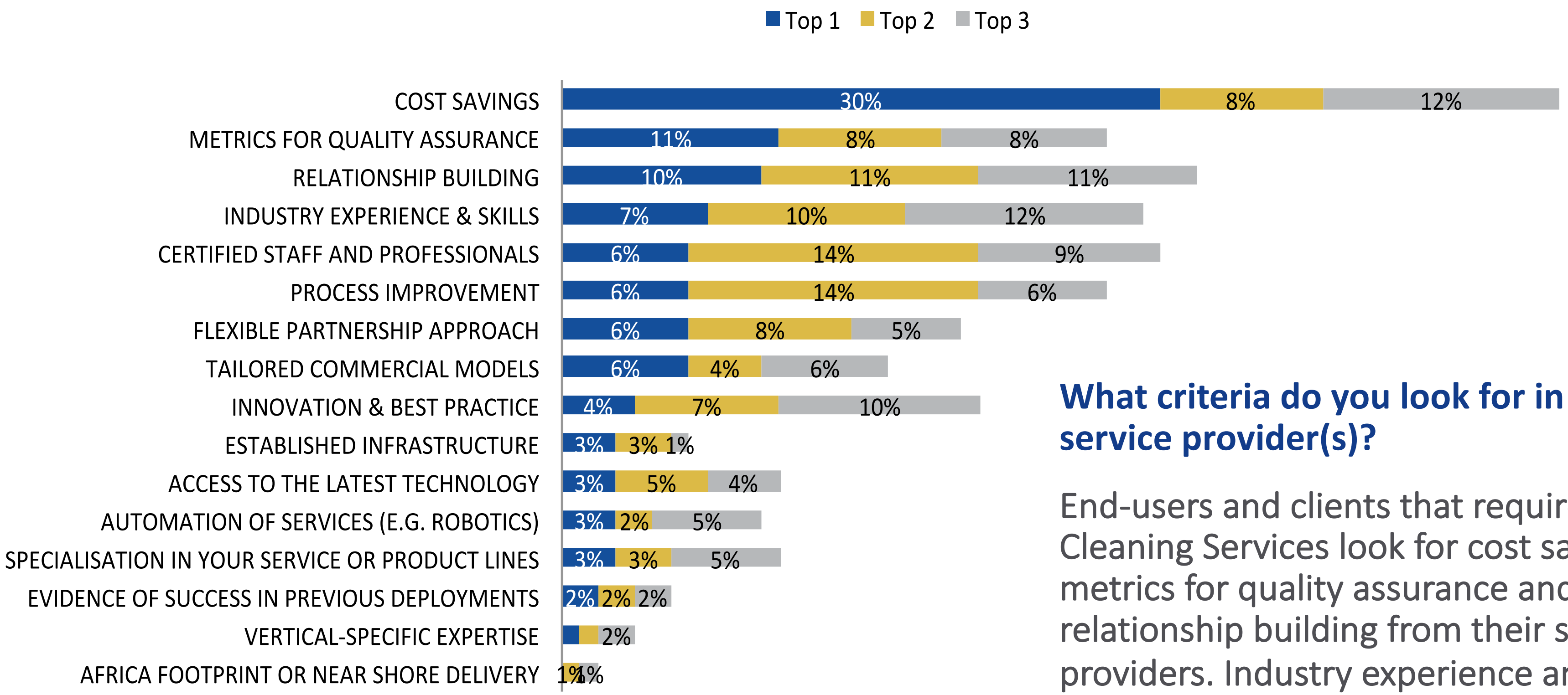


What criteria do you look for in your service provider(s)?

Both the Catering industry and end-users 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 stand-out criteria for Camp Management.

FM SERVICE PROVIDER REQUIREMENTS

CLEANING



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

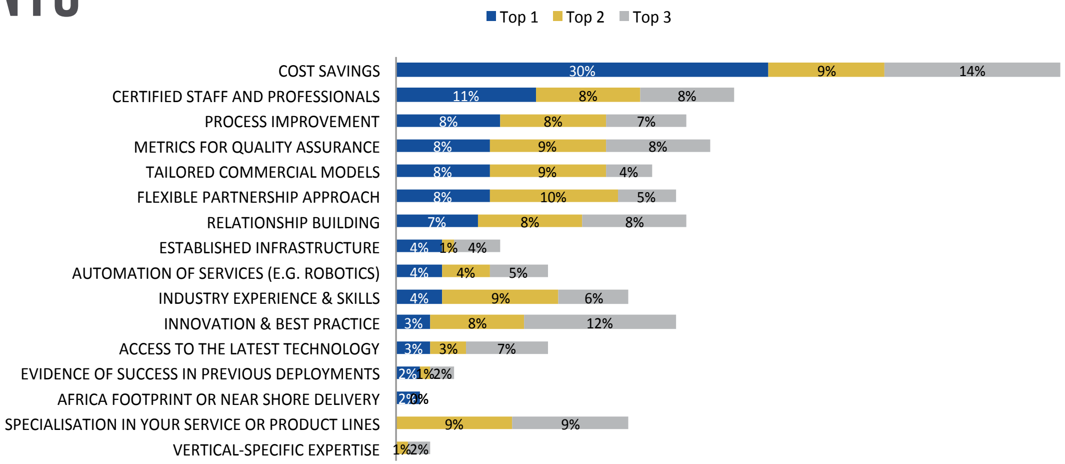
End-users and clients that require Cleaning Services look for cost savings, metrics for quality assurance and relationship building from their service providers. Industry experience and skills, certified staff and professionals and process improvement are also key criteria that they look for.

FM SERVICE PROVIDER REQUIREMENTS

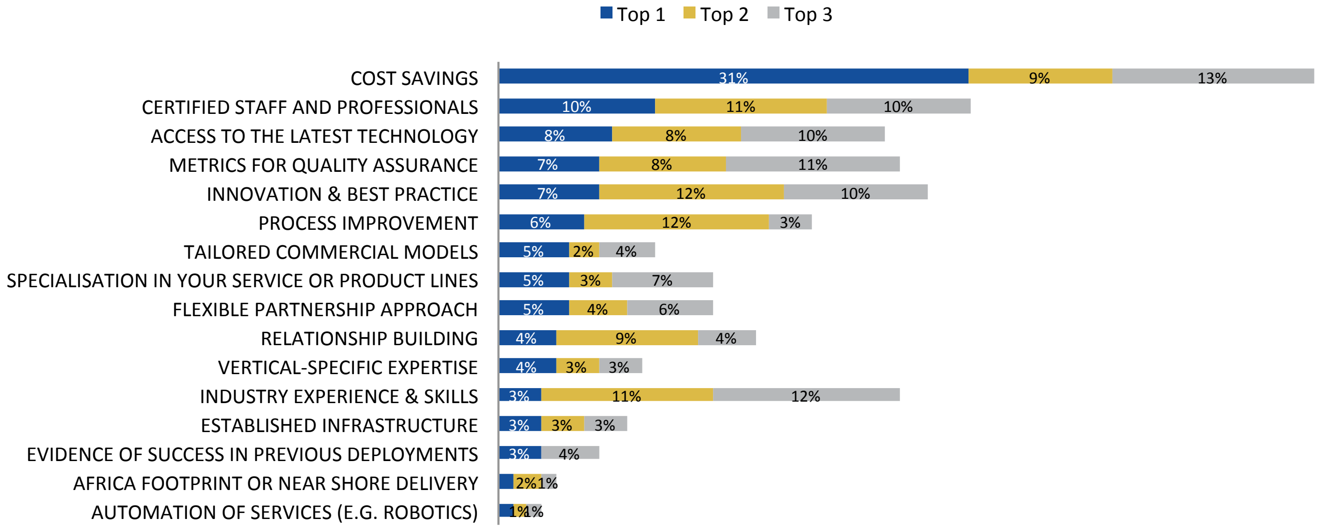
What criteria do you look for in your service provider(s)?

Besides the principal criteria of cost savings and certified staff and professionals, end-users and clients of Hygiene and Pest Control services also look for access to the latest technology, metrics for quality assurance with innovation, best practice and process improvements.

HYGIENE



PEST CONTROL

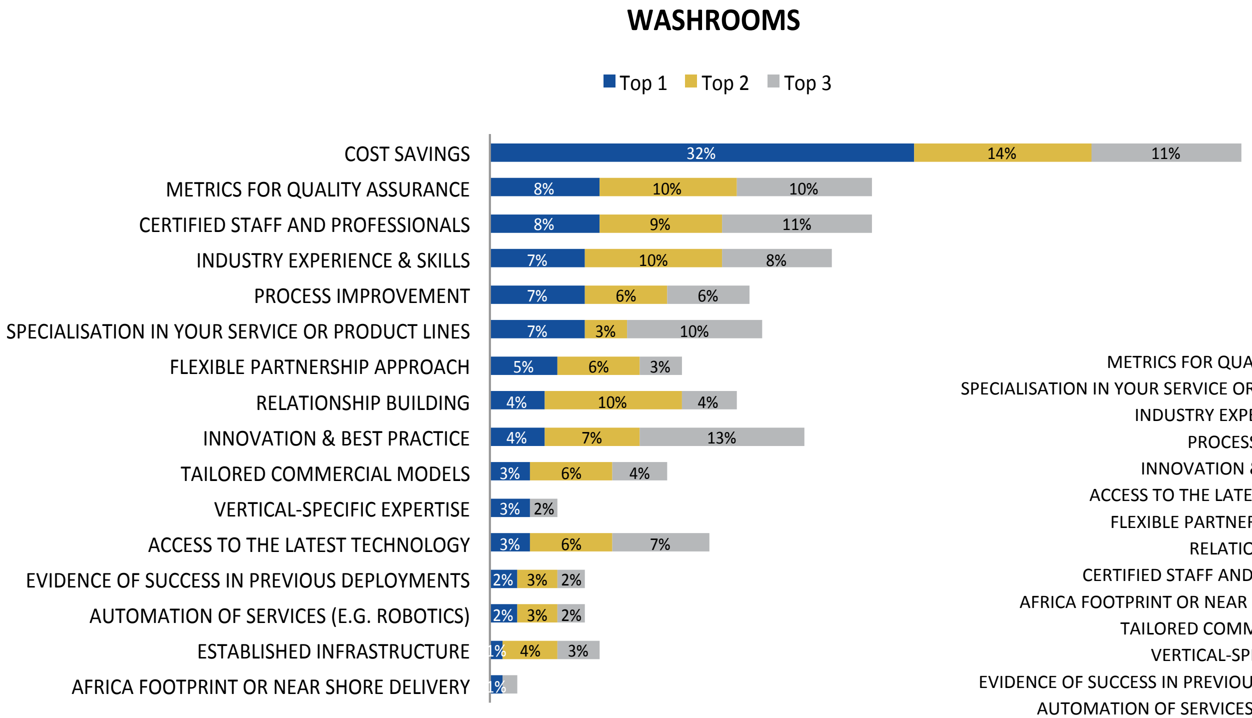


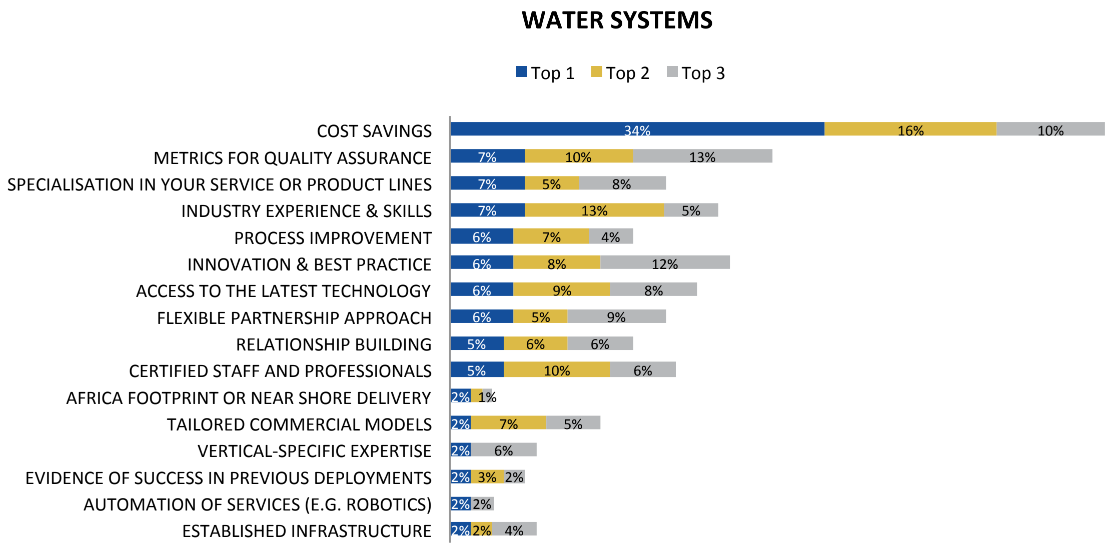
Editors Note
About the research
Executive summary
Overall FM market share
FM growth and service lines
Vertical industry growth
Vertical industry requirements
Service provider criteria
Tenders and proposals
Budget ranges and cycles
Epilogue
Glossary

FM SERVICE PROVIDER REQUIREMENTS

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

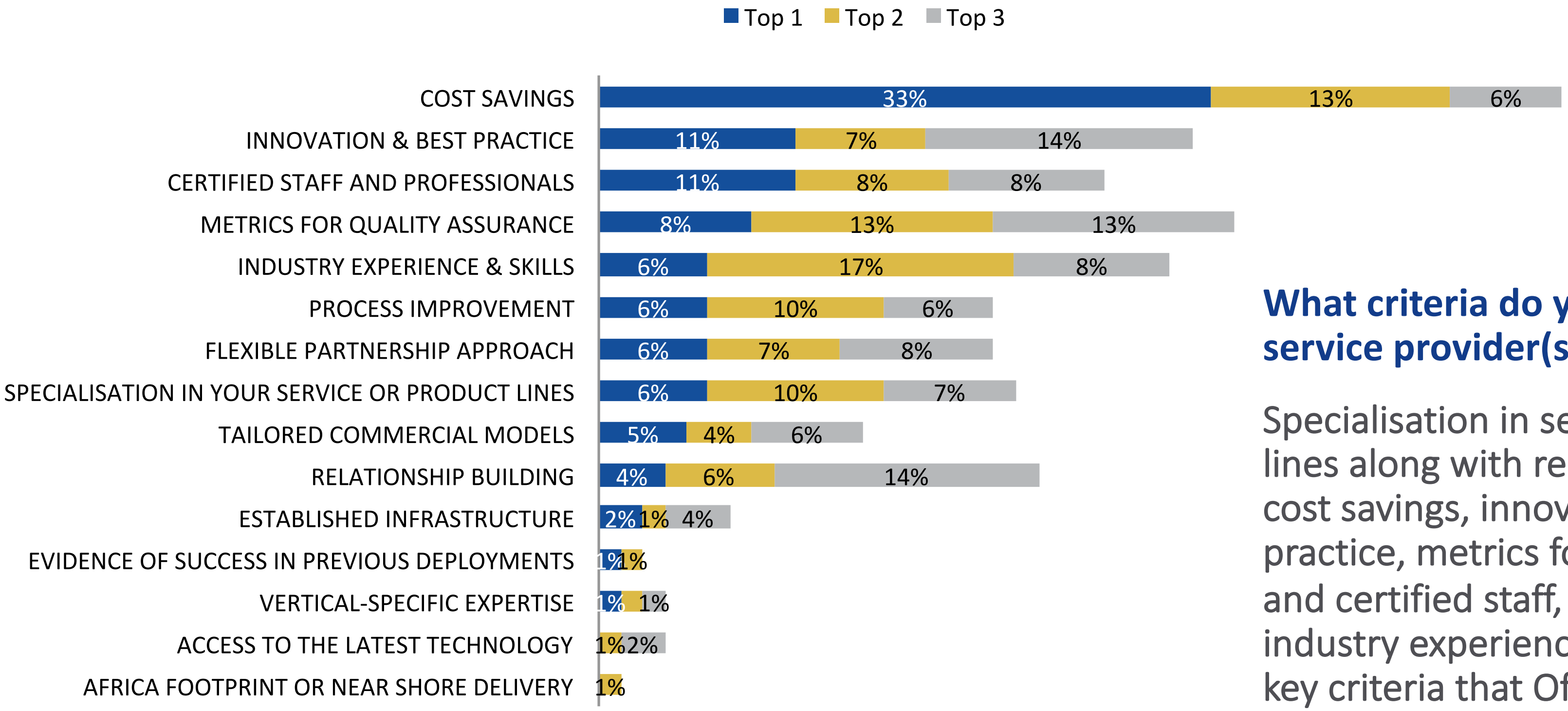
End-users of Washrooms and Water Systems also look for specialisation in these service or product lines in addition to cost savings, metrics for quality assurance and certified staff, professionals, industry experience and skills.





FM SERVICE PROVIDER REQUIREMENTS

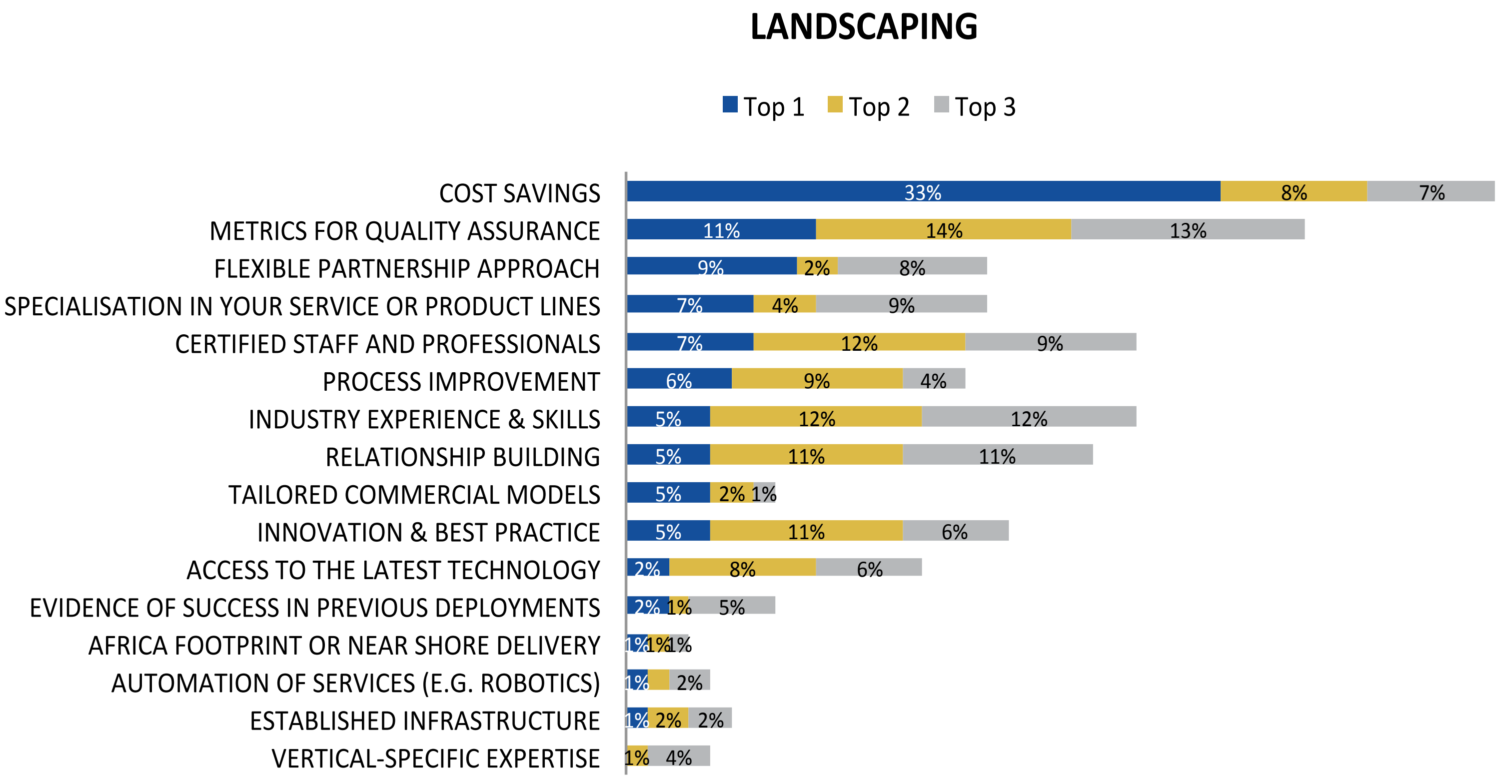
OFFICE PLANTS



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.

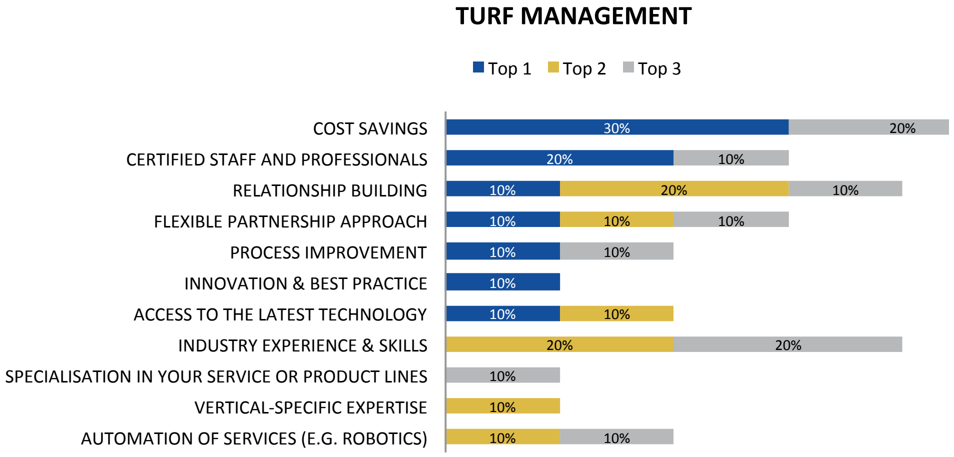
FM SERVICE PROVIDER REQUIREMENTS

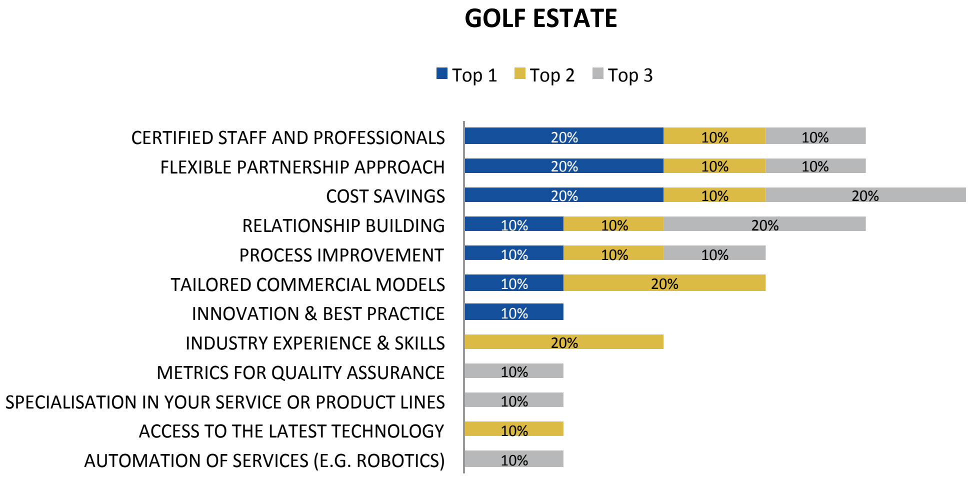


What criteria do you look for in your service provider(s)?

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.

FM SERVICE PROVIDER REQUIREMENTS

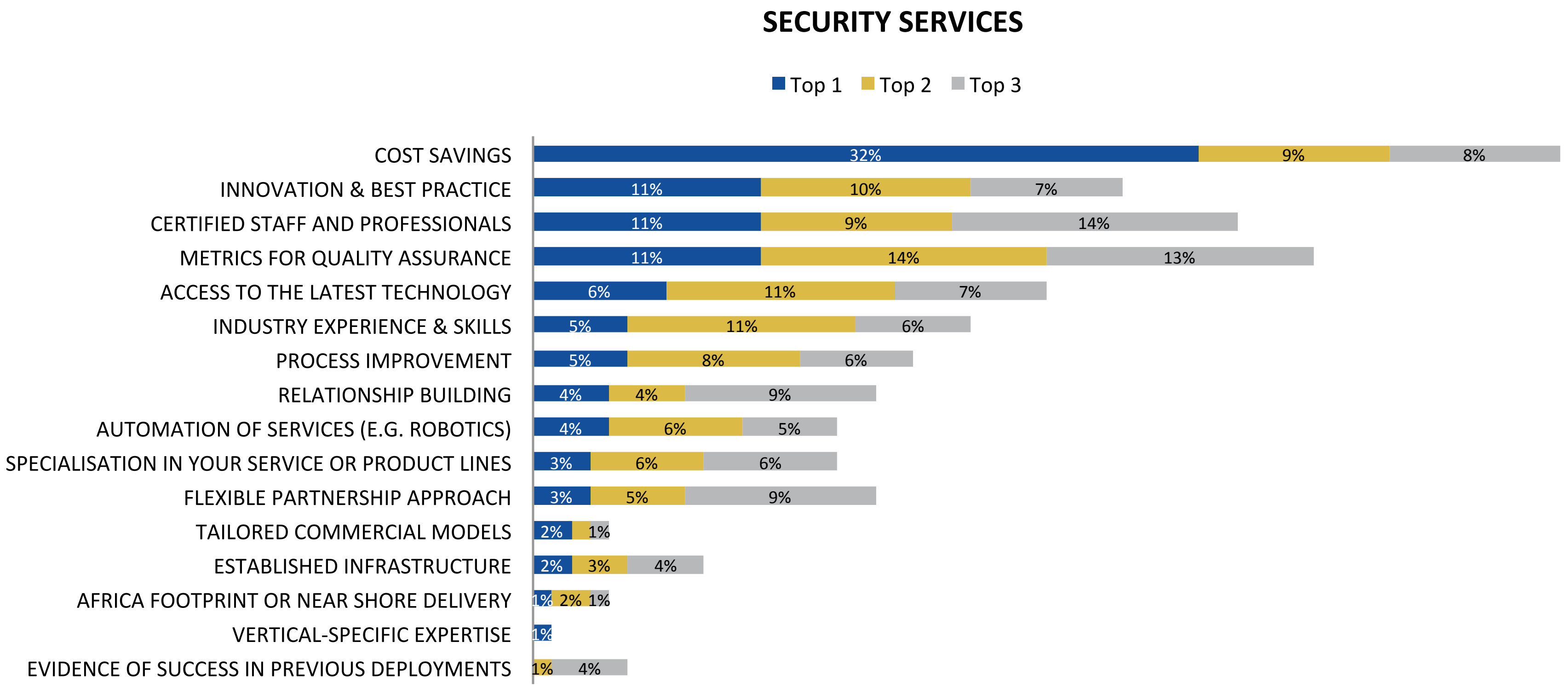




What criteria do you look for in your service provider(s)?

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.

FM SERVICE PROVIDER REQUIREMENTS

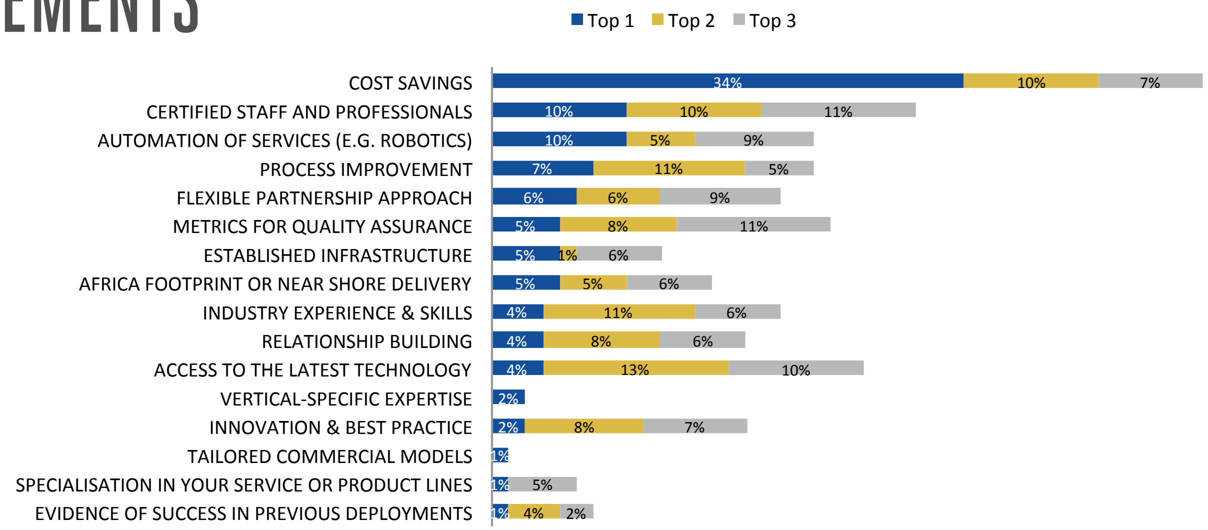


What criteria do you look for in your service provider(s)?

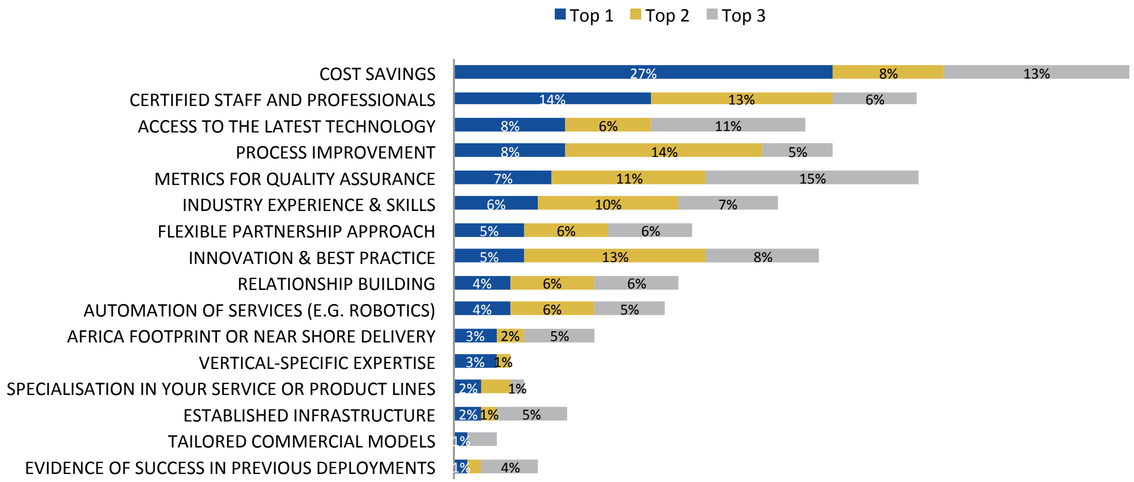
When deploying Security Services and with that guards, surveillance and monitoring services, end-users and clients require that these service providers provide quality assurance, qualified guards and professionals along with innovation, best practice and access to the latest security technology.

FM SERVICE PROVIDER REQUIREMENTS

PARKING CONTROL SYSTEMS



SECURITY TECHNICAL SOLUTIONS



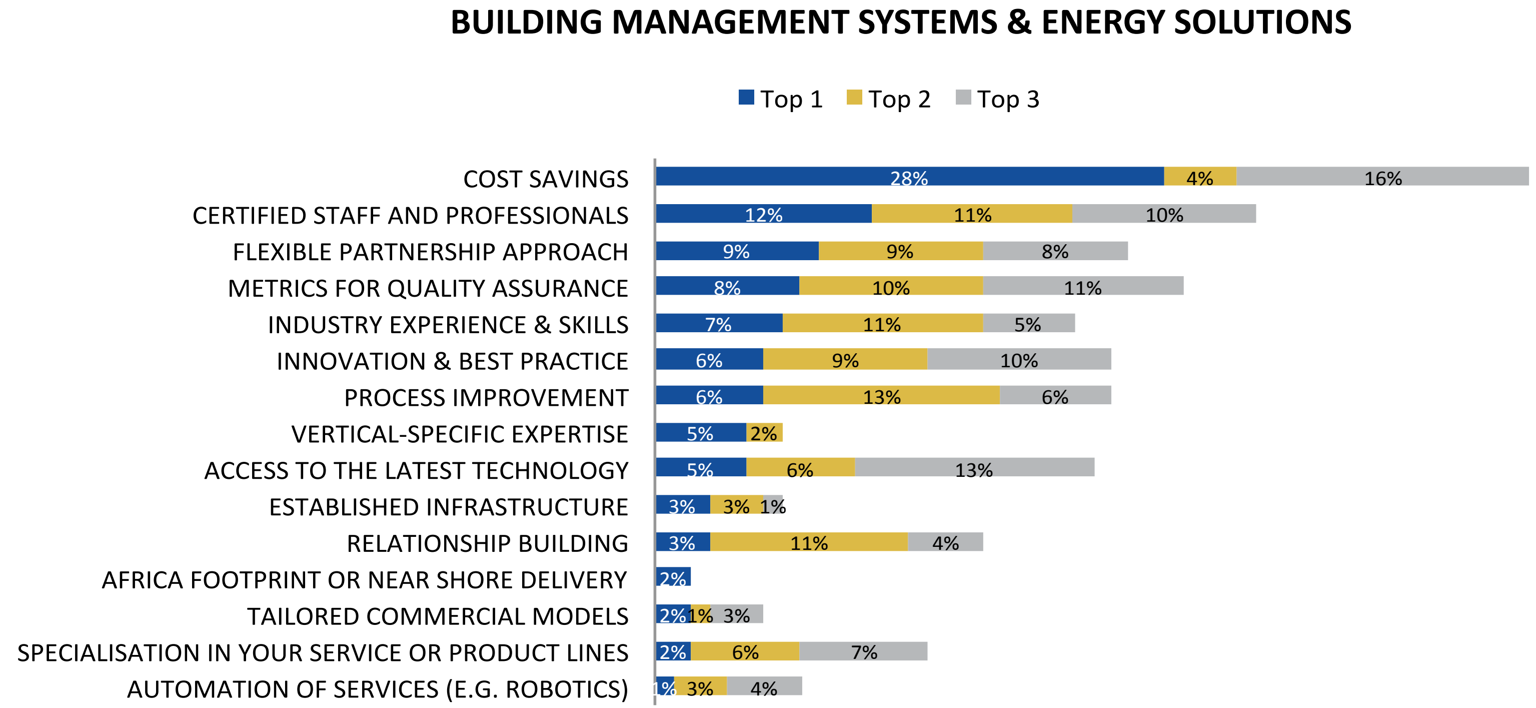
What criteria do you look for in your service provider(s)?

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.

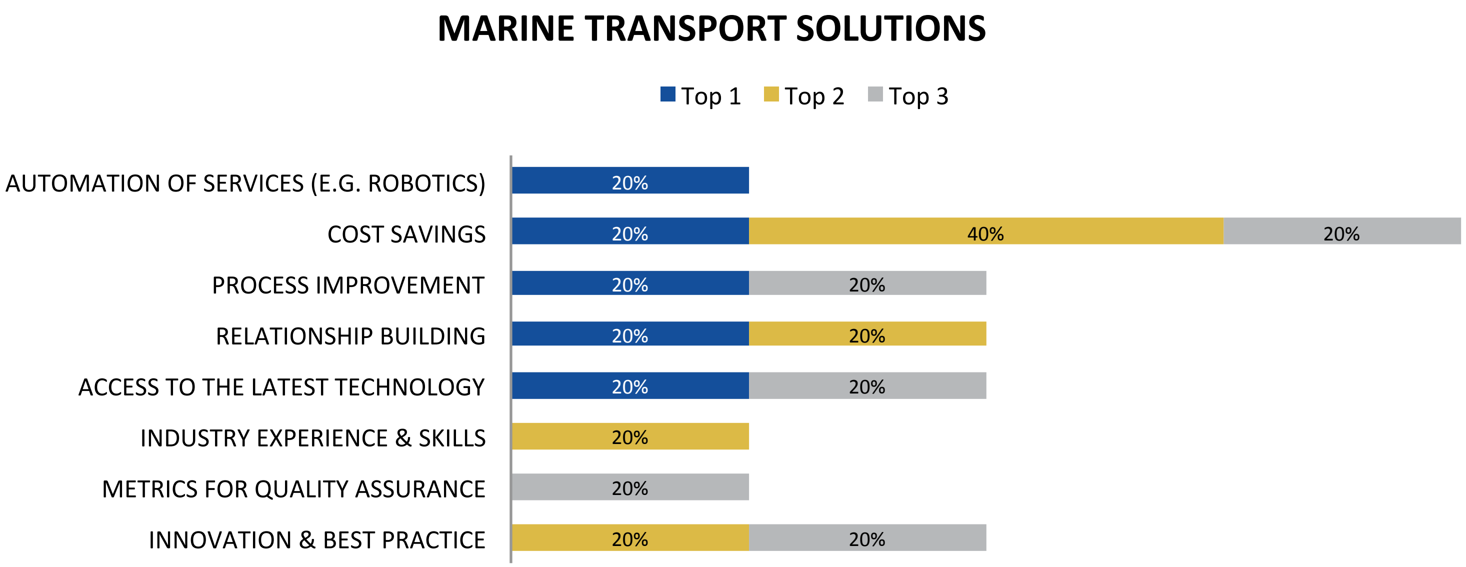
FM SERVICE PROVIDER REQUIREMENTS

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.



FM SERVICE PROVIDER REQUIREMENTS



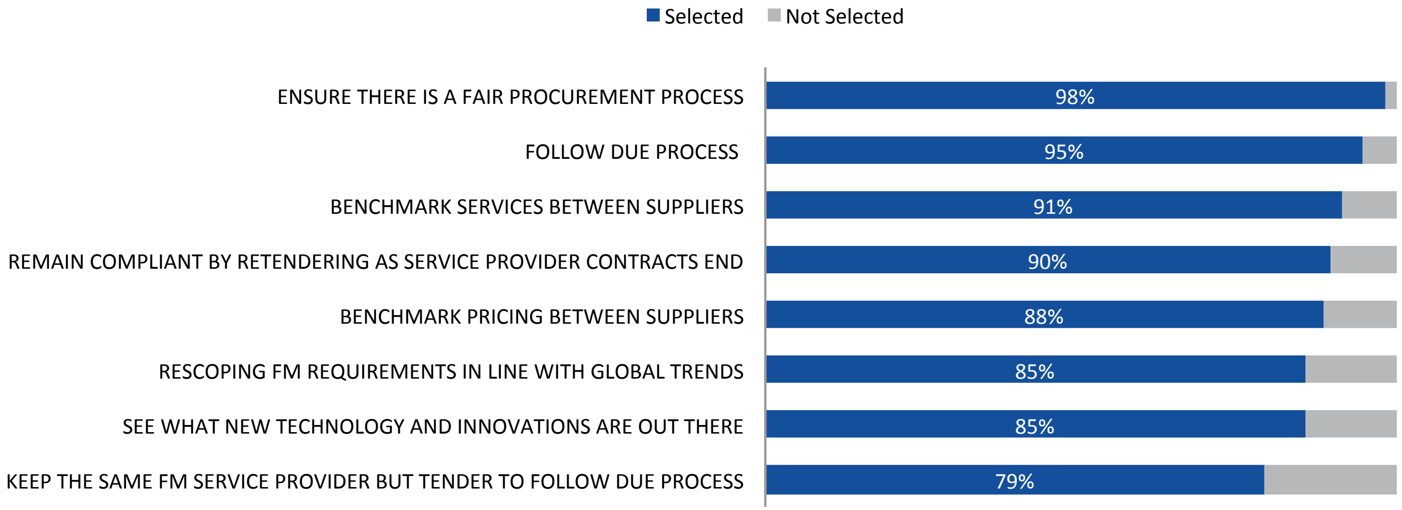
What criteria do you look for in your service provider(s)?

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.

TENDERS & PROPOSALS

TENDERS & PROPOSALS

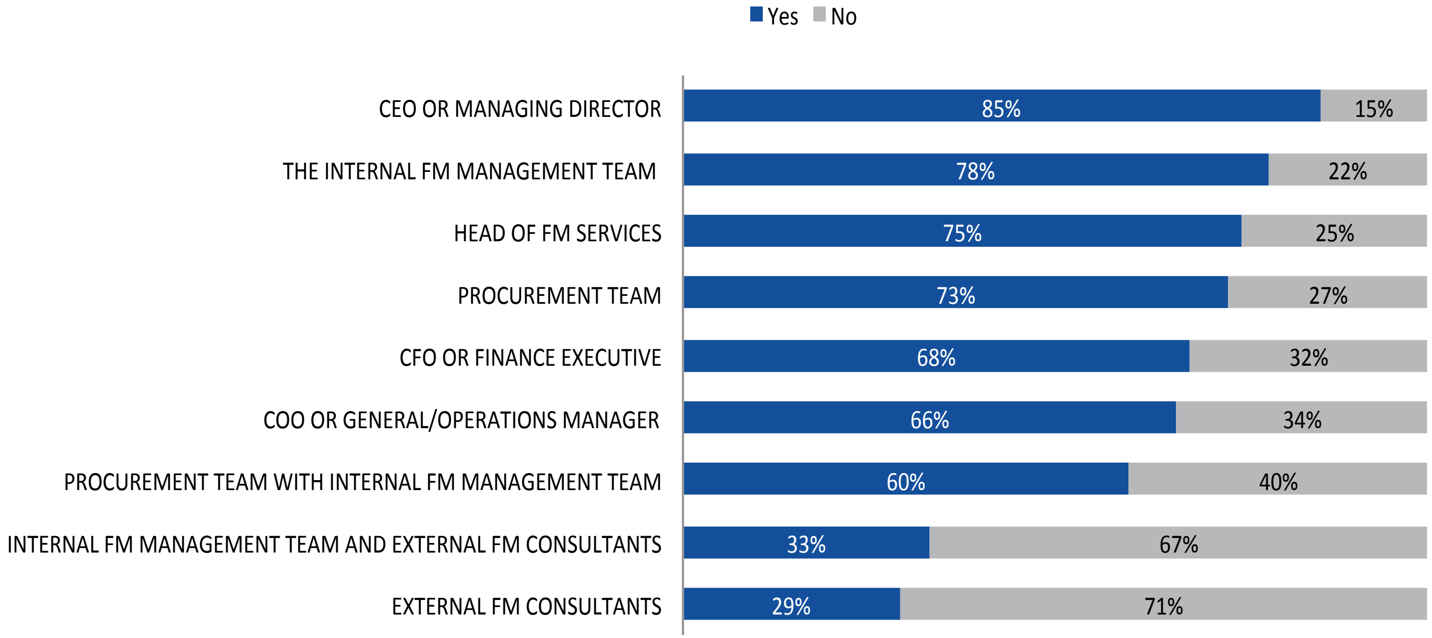
WHEN YOUR ORGANISATION PUTS OUT A REQUEST FOR PROPOSAL (RFP) OR TENDER, WHAT ARE YOUR OBJECTIVES?



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

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

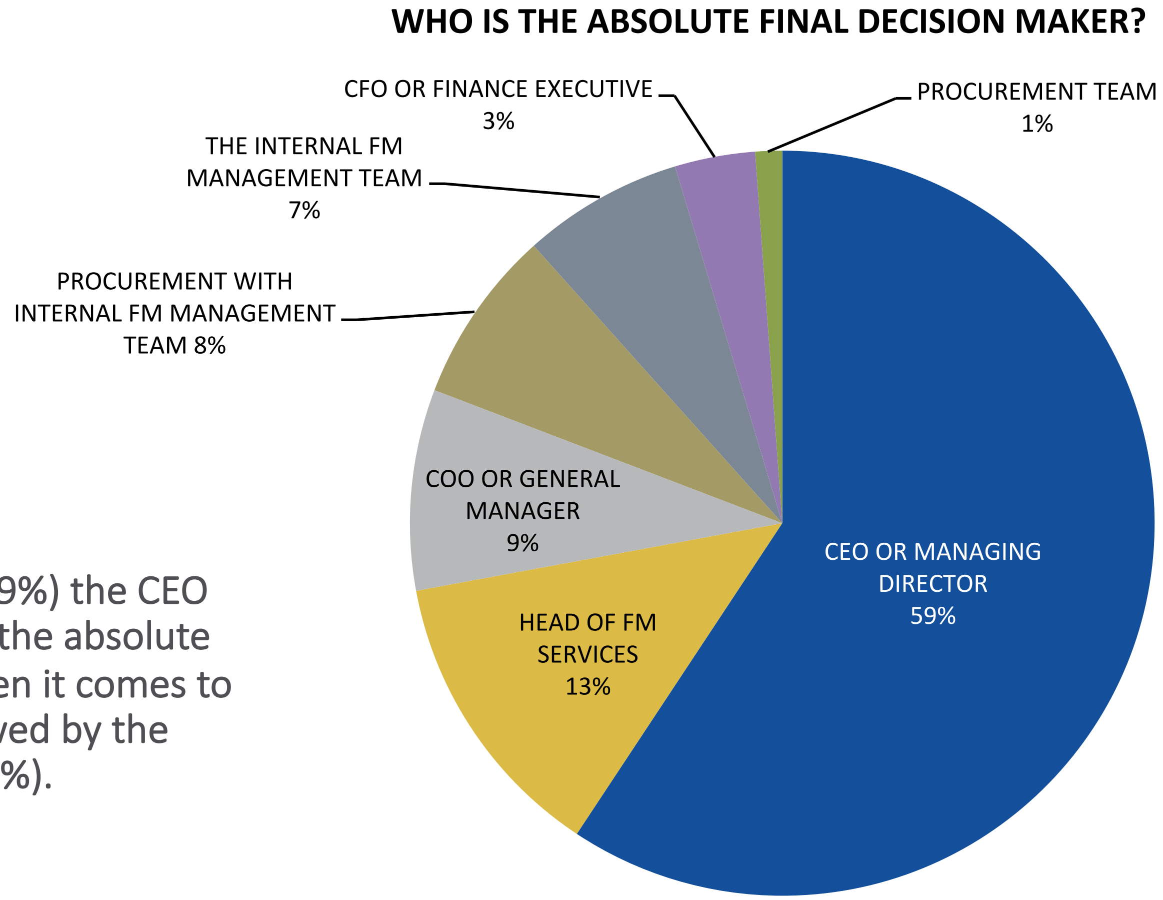


The following decision makers normally make up the tender team:

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

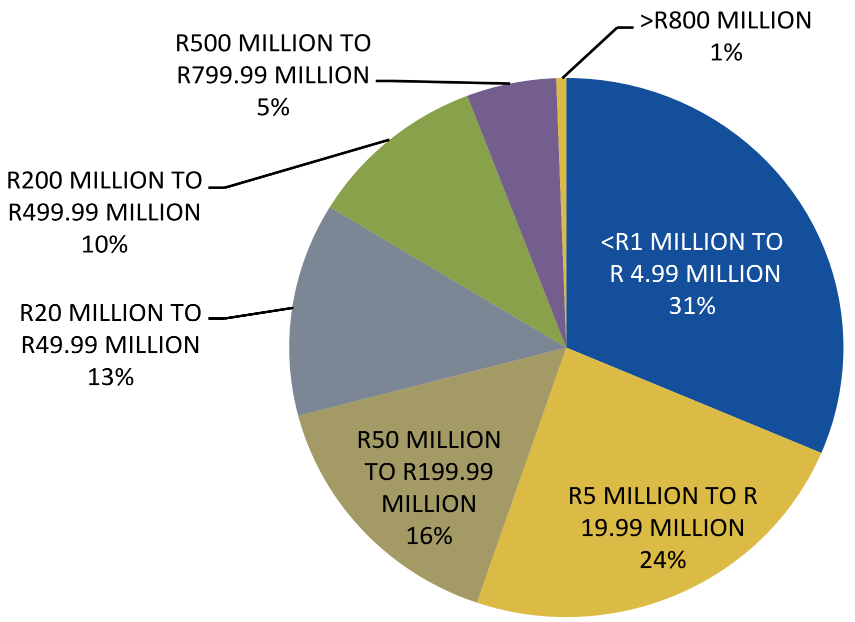


In most organisations (59%) the CEO or Managing Director is the absolute final decision maker when it comes to awarding tenders, followed by the Head of FM Services (13%).

FM BUDGET RANGES & CYCLES

FM BUDGET RANGES & CYCLES

WHAT WAS YOUR TOTAL OPERATIONAL BUDGET RANGE FOR FM SERVICES FOR THE PAST 12 MONTHS OR FINANCIAL YEAR?



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%).

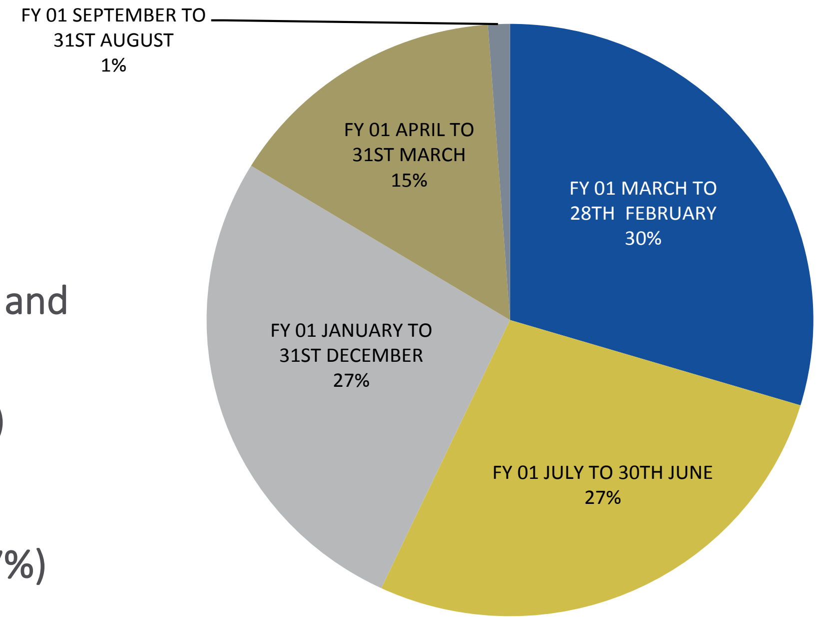
FM BUDGET RANGES & CYCLES

Financial Years

Financial Years sit in 4 main periods and timelines:

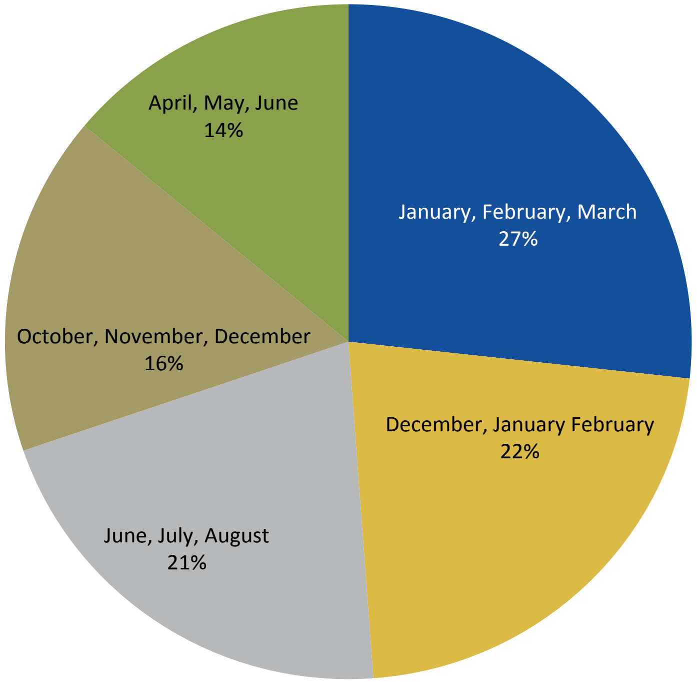
1. 01 March – 28th February (30%)
2. 01 July – 30th June (27%)
3. 01 January – 31st December (27%)
4. 01 April to 31st March (15%)

WHEN DOES YOUR FINANCIAL YEAR RUN?



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%)

EPILOGUE

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.**

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.

TERMS, CONDITIONS & POLICIES

2018 – 2019 FACILITIES MANAGEMENT MARKET ANALYSIS SURVEY: SOUTH AFRICA

Servest Head Office
Corner of Bridal Veil Road and
Tugela Lane, Waterfall Logistics
Precinct, 209
www.servest.co.za
Tel: +27 (0) 860 22 55 84

Knowledge Executive Head Office
1st Floor, Block L South, Central
Park Office Park, 400 16th Street,
Cnr. New Road, Midrand, 1685
www.knowledge-executive.com
Tel: +27 (0) 026 7870