Master thesis : "(Re)defining the strategy and positioning of Facilicom."

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(RE)DEFINING THE STRATEGY AND POSITIONING OF FACILICOM

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Abstract

The purpose of this dissertation was to formulate strategic recommendations for facility service providers, more specifically multi-service providers, after performing a thorough industry analysis. We used Porter's Five Competitive Forces model to analyze the industry and performed a PESTEL analysis to determine possible macro-economic influences. The scope of our research was the Belgian market for FM multi-service providers. We define an FM multi-service provider as an organization that is able to provide most main FM services directly or through their subsidiaries. Our results indicated that the power of buyers is strong, rivalry among competitors is quite high, threat of entry and threat of substitutes are mediocre and the power of suppliers is the weakest force. We found the strongest macro-economic impact coming from economic, technological and socio-cultural variables. Our conclusion is that the market currently is profitable if players chose the right positioning. The main drivers for future change are technological developments, market growth and projected shortage in FM professionals. The most competitive advantage can be gained by identifying ways to differentiate successfully from competitors and aligning own services to meet market needs.

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Introduction

Facilicom Group Belgium

The core business of Facilicom Services Group Belgium (FSGBE) is facility management services (FM). FSGBE holds six companies that all provide single, combined or multi-services and can be offered accordingly. The companies are Gom, Trigion, Prorest, Facilicom Solutions, and Axxicom. Through these subsidiaries, FSGBE offers cleaning, catering, security, reception services and facility management directly to the Belgian market. Most subsidiaries have subdivisions with specialist go-to-market services.

Figure 1 Facilicom Services Group BE subsidiaries

Other complementary facility services (greenery, waste management,…) are offered through partnerships with specialist service providers. In the past FSGBE offered technical building maintenance (Hard FM), however in February 2021 the companies providing these services where divested from the group following the company strategy to focus primarily on soft FM services. A strategic partnership is held with the divested companies to offer hard FM services to the market.

The commoditization of the FM market

The perception within FSGBE is that the market for facility services is evolving towards a commoditized market. Reimann et al. (2010) describe the characteristics of this type of market as one with a high product homogeneity, high buyer price sensitivity, low switching costs and high industry stability. High product homogeneity means that customers perceive products of different suppliers as interchangeable (Greenstein, 2004). Apart from management and catering services, there is little room for differentiation. Due to the lack of differentiation possibilities, other offerings (cleaning, security, reception services,…) might seem interchangeable between different facility service suppliers. The lack of possibilities to differentiate results in cost-plus pricing models, a subsequent race to the bottom for prices and thin margins. Price sensitivity refers to the different reactions an individual can have on price changes, when highly sensitive a little variation in price will bring forth a big reaction and vice versa (Goldsmith & Newell, 1997). For FM services, buyer price sensitivity is even translated in tender scoring procedures. These procedures, more often than not, have the lion's share of points on price (ranging from 50% to 80%) and scoring is always relative to the cheapest one. Industry stability is reflected in predictable market demand, few changes in set of customers and in competitive structure (Reimann et al., 2010), this is also the case for the FM market. Only the switching costs are not completely in line with the description of Reimann et al. (2010). Although there are little to no monetary switching costs, there are procedural switching costs (Burnham et al., 2003). It takes a lot of time and effort to set up and execute a tender procedure to switch facility service provider.

Research results from Reimann et al. (2010) show that as commoditization increases, operational excellence and product leadership lose impact, while customer intimacy becomes a more vital performance driver.

Current position

For each of its services FSGBE faces competition from multiple angles, by other multi-service providers, by specialist single service providers and from Small and Medium Enterprises (SMEs). In recent years there has been extra competition coming from backwards integration of real estate players into the FM market. Increasing competition in a commoditized market brings certain topics recurrently to the FSGBE boardroom table and most likely to the agendas of all other major players in the FM market. How do we distinguish ourselves in the current market? How can we add value to our propositions? How should we position ourselves to remain relevant in future markets? For FSGBE, its current (unique) selling position (USP) is linked to its broad service portfolio. The broadness of the portfolio allows it to act as a one-stop-shop for all soft FM services. FSGBE is able to offer all main FM soft services through subsidiaries, in multi-service or integrated facility management (IFM) contract formula. These types of contracts provide strategic advantages because they enable operational synergies across the different services as well as in overhead, both synergies resulting in improved service quality and cost reduction. With our multi-service and IFM offerings, we can distinguish ourselves from single service providers and SMEs. Through this distinction, the competitor field is thinned out so that only other multi-service providers remain. Multi implies two or more, but in this context, we refer to a multi-service supplier as an organization that can provide almost all main FM services through owned subsidiaries. Bundling services through an IFM offering, is deemed a successful strategy to delay further commoditization by Quelch (2007). In his research, he identified three ways to delay commoditization and a number of strategical considerations for companies that are already in commoditized markets. The three ways to delay commoditization are innovation, bundling and segmentation. When already in a commoditized market, managers should rethink salesforce compensation and pricing, trim costs, acquire competitors and fire unprofitable customers.

Research question

To be relevant, an understanding of the current market and alignment of current offerings to that market is necessary. To remain relevant it is necessary to understand where your market is moving towards and to make sure you are moving in the same direction. There are well known examples of market leaders who vanished because they focused too much on the current market and did not align with where the market was heading. To name one example, Kodak was market leader in analogue photography in the 1970's. However, Kodak misjudged the digital revolution and got surpassed by its competitors leaving the company for years of struggle and nearly going bankrupt a number of times (DiSalvo, 2011). In order to be future-proof and avoid Kodak-like scenarios it is necessary to deploy the right strategy now. Through this dissertation, we want to determine the strategy and positioning that is most likely to be successful for a facility multi-service provider in Belgium. Our main research question therefor is: What is the most successful and sustainable strategy for a facility multi-service provider in Belgium?

Literature and concepts

Before we start analysing our industry and developing strategy, we will frame relevant theoretical concepts, terminology and models. We will start of by deep diving in to the history of Facility Management (FM) as a discipline and frame some relevant terminology. Next, we will discuss and evaluate relevant strategic frameworks. From the relevant frameworks, we will select one or more to determine the right strategy for a facility multi-service provider in the Belgian market.

Facility management definition

The exact origin of facility management as a distinct discipline is unclear. Historically its definition and scope depended greatly on the local culture, organisation's interest and people's personal interest (Lindholm, 2005). Over the past two decades, there has been a movement towards a common definition of facility management. At the turn of the century, FM's primary function was described as resource management, at strategic and operational levels of support. According to this definition four types of resource management are central in FM: financial resources, physical resources, human resources and informational and knowledge resources (Nutt, 2000). In 2003 the International Facility Management Association (IFMA) redefines FM as the profession that encompasses multiple disciplines to ensure functionality, comfort, safety and efficiency of the built environment by integrating people, place, process and technology (FMLink, 2003). The two latest relevant additions to the definition of FM come from NBN and ISO. In 2006 most European countries agreed to define FM as the integration of processes within an organisation to support and maintain certain agreed upon services, with the aim of supporting and improving the effectiveness of the primary process (BSI, 2007). The final relevant refinement of the definition of FM came from ISO, ISO defines FM as the organizational function which integrates people, place and process within the built environment with the purpose of improving the quality of life of people and the productivity of the core business (NBN, 2018). ISO's definition of FM is the most comprehensive in terms of scope, application and goals. For this dissertation, we will apply ISO's definition of FM.

Facility management scope

ISO defines a facility service as any support provision to the primary activities of an organization, delivered by an internal or external provider (International Organization for Standardization, 2017). These services can be clustered according to three interrelated elements of business, namely premises, support services and information technology (Cooke, 2017). Services that are related to premises and building management are generally referred to as Hard FM. Hard FM services include, amongst others, mechanical systems and services, electrical systems and services, HVAC, public health services, control systems, utility services, property management, fabric maintenance, external areas and landscaping. Business support services are usually referred to as Soft FM services. Soft FM services include, amongst others, mail/post/courier services, catering services, internal and external greenery, security services and cleaning services. Information technology services include data network, system integration, software development,…

Strategy theories and other frameworks

Through the years, there has been a lot of discussion about what is the right way to set up a company strategy. Numerous theories have been formulated and some gained more traction than others did. Discussions are ongoing and opinions are divided, but it seems clear that there is no one-size fits all for strategy development and some truth to be found in most of the theories. We have described the most relevant underneath and will evaluate which is most appropriate to use as a framework for our research question.

Peter Senge's learning organization

Senge (1990) describes the learning organization as the ideal structure for achieving continuous change and improvement. A learning organization can transform itself to survive and excel in rapidly changing business environment. His fifth discipline model suggests that a learning organization has five key disciplines: personal mastery, mental models, shared vision, team learning and systems thinking. These five disciplines can be divided into two categories according to either focus on individuals or groups. Personal mastery, mental models and system thinking focus on individual behavior and practices in an organization, while shared vision and team learning are inherently collective in nature. Personal mastery is the process of personal commitment to vision, excellence and life-long-learning. Personal mastery is achieved through continually clarifying and deepening our personal vision, focusing our energies, developing patience and seeing reality objectively. Mental models are assumptions, generations, pictures and images that influence how we understand the world and take action, they are established by maintaining a balance between inquiry and advocacy. System thinking focusses on interconnectedness, system archetypes and simulation. Shared vision means that individual visions and goals are integrated in a shared organizational vision. Senge states that an organization can only learn through team learning.

Figure 2 The five disciplines of the learning organization (Senge, 1990).

Porras and Collins' Big Hairy Audacious Goals

When comparing successful organizations in various sectors, Porras & Collins (1994) found that enduring successful organization often had a lofty, compelling and unifying goal. According to Porras and Collins, this goal generates incredible commitment and organizational development. They refer to this goal as a Big Hairy Audacious Goal (BHAG). By nature, a BHAG is tangible, needs little explanation, gives energy and is highly focused. Through its clarity and compellingness, a BHAG gives the people in an organization a unifying focal point to guide their effort towards a clear ending point. Therefor a BHAG is bold, creates a very high level of commitment, inspires willingness to take risks and is consistent with the core ideology of an organization.

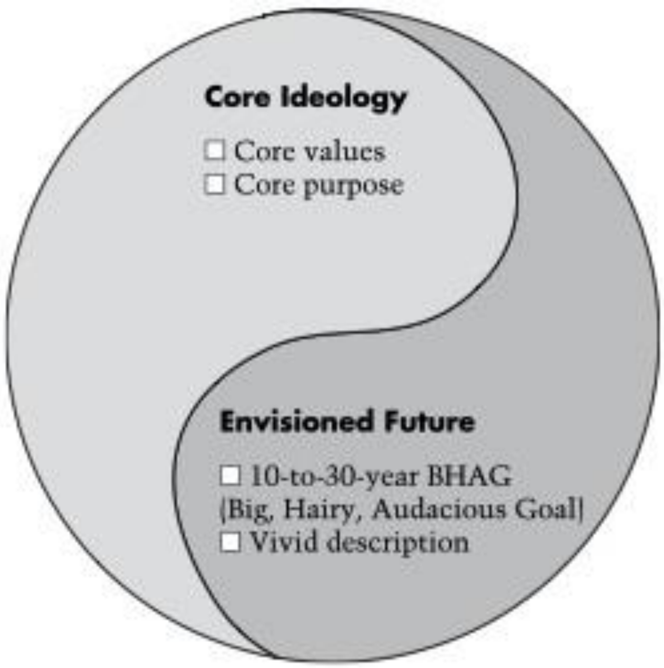

Figure 3 Vision, values and purpose according to Porras & Collins (Porras & Collins, 1994).

Kim and Mauborgne’s Blue ocean strategy

Kim & Mauborgne (2004) broadened views on strategy with their Blue Ocean strategy. They distinguished between Blue Oceans and Red Oceans, Blue Oceans are not yet existent and thus uncontested market spaces. Red Oceans are the already existent market spaces with established rules. In a Red Ocean, boundaries are defined and accepted, with competitive rules well understood by all players. In this type of market rivals compete with each other for a greater piece of market share and as the market space gets more crowded, products turn into commodities, profit and growth is reduced with competition ever rising. Blue Oceans on the contrary are not yet in existence, so they are without competition. In this market space, demand is created rather than fought over, this creates many opportunities for profitable growth.

Red Ocean Versus Blue Ocean Strategy

The imperatives for red ocean and blue ocean strategies are starkly different.

Red ocean strategy	Blue ocean strategy
Compete in existing market space.	Create uncontested market space.
Beat the competition.	Make the competition irrelevant.
Exploit existing demand.	Create and capture new demand.
Make the value/cost trade-off.	Break the value/cost trade-off.
Align the whole system of a company's activities with its strategic choice of differentiation *or* low cost.	Align the whole system of a company's activities in pursuit of differentiation *and* low cost.

Figure 4 Characteristics of both oceans (Kim & Mauborgne, 2004).

Kim and Mauborgne indicate that these markets can be created in two ways. Either by creating a completely new industry (e.g. eBay for online auctions) or from within a Red Ocean by a player that alters the existing boundaries (e.g. Henry Ford's conveyor belt). According to Kim and Mauborgne, it is key for a Blue Ocean strategy is making the right strategic move and creating a leap in value for both the buyers and themselves. A Blue Ocean strategy pursues both differentiation and low cost simultaneous. This can only be achieved if the whole system is aligned, from a company's utility, its price to the cost activities.

Porter's five competitive forces

The essence of strategy is coping with competition and competition is rooted in the underlying economics of an industry (Porter, 1980). Five competitive forces determine the total amount of competition within every industry. The collective strength of these forces determines the final profit potential of the industry. Next to competitors, customers, suppliers, potential entrants and substitute products all contribute to industry competitiveness. Strategy according to Porter is to assess the collective strength of the forces and identify the sources behind each force in order to find the best position in the industry to defend against the forces or use them in your favor.

Figure 5 The five competitive forces that shape competition (Porter, 2011)

PESTEL

An industry does not exist on itself, it is part of a greater macro-economic environment, which can have a profound impact the industry and the organizations in it. To assess the macro-economic environment we will make use of a PESTEL analysis. PESTEL is an acronym that stands for Political, Environmental, Social, Technological and Legal. The analysis assesses the possible impact of all of these variables.

Evaluation of frameworks

The learning organization underlines the importance of continuous learning to adapt to an ever-changing business environment. The theory describes clearly how to facilitate learning both at an individual and at a group level. This model focusses on the requirements to become successful at learning and strategy is limited to becoming a learning organization. Although providing relevant insights, this approach is not suited for answering our research question, a focus on and analysis of the broader industry is missing. Though the BHAG theory provides insight in the crucial effect an inspiring shared goal can have on the motivation of your workforce, it does not specify how broader company strategy should be determined. The Blue Ocean strategy is interesting in relation to our research question, in the sense that it broadens the view on possible markets and inspires to challenge existing industry boundaries. From all discussed frameworks, Porter’s Five Competitive Forces seems the most relevant framework to use for our research, as it can give insight in industry dynamics and can help us identify where in the market it is most interesting to play. In our case, the PESTEL analysis can be a valuable addition to Porter’s Five Competitive Forces, as it gives an additional view on the broader macro-economic variables impacting the industry.

Selected frameworks

Before applying them, we will go deeper into the chosen theoretical frameworks and the general principles that lie behind each theory.

Porter's Five Competitive Forces

Before diving into the analysis itself, it is important to clearly state the way Porter defines a few commonly used managerial concepts.

Strategy

According to Porter, strategy explains how an organization, faced with competition, will achieve superior performance. This starts with having the right mind-set. Competition is not warfare, it lies in an organization's ability to create unique value. Unlike in war and sports, there can be more than one winner. Thus, competion-to-be-the-best does not make sense in business, neither does it produce an optimal outcome for competing organization and their customers. Because there are so much different needs to be met in any market, trying to be the best and meeting all of them is by default an unreachable goal. Furthermore, if all companies in the market deploy this strategy, this would lead companies on a collision course due to competitive convergence. If everybody is pursuing the same goal, all offerings start to look alike as differences erode in trying to be the best. (Magretta, 2012)

Compete to be unique

Instead of competiting to be the best, organizations should compete to be unique. This concept is about the uniqueness of the value you create and how it is created. The focus here lies in creating superior value for a set of chosen customers, not by imitating or matching rivals. (Magretta, 2012)

BE THE BEST	BE UNIQUE
Be number 1	Earn higher returns
Focus on market share	Focus on profits
Serve "best" customer with "best" product	Meet diverse needs of target customers
Compete by imitation	Compete by innovation
ZERO SUM A race that no one can win	**POSITIVE SUM** Multiple winners, many events

Figure 6 differences between competing to be the best and competing to be unique (Magretta, 2012).

Competing for profits

According to Porter, the goal of competition is not to beat your rival it is to be profitable. There is more than one battle to be fought to become and remain profitable. Organizations compete with customers who always want to pay less, with their suppliers who want to be paid more, with producers of similar products that can substitute their product and with their rivals, current and future. According to Porter, these five fields of competition are present in each industry's structure, once formed they are persistent and determining for profitability of an industry. The general rule for assessing the impact of any force, the stronger the force, the more the pressure it will put on prices, costs or both (Magretta, 2012).

The five forces

The five competitive forces determining the chance of conducting profitable business in any given industry according to Porter are the power of buyers, the power of suppliers, the threat of substitutes, the threat of new entrants and the rivalry among competitors.

When buyers are strong, customers will push down prices or demand more value for the same price. Industry profitability will be lower because customers catch more value for themselves. This force should always be assessed together with the channel through which products are delivered. This force is linked to the economic concept of price sensitivity, the higher the sensitivity the more likely for customers to push prices down. A higher price sensitivity generally occurs when products are undifferentiated, expensive relative to their other costs or income and inconsequential to their own performance. (Magretta, 2012)

If the bargaining power of is strong, suppliers will charge higher prices for their products or insist on more favorable terms. When assessing this force we have to take into account all purchased inputs for product or service. Unions also fall under this force. Supplier power tends to be strong if the industry needs them more than they the industry, suppliers are large and concentrated relative to a fragmented industry, the cost of switching works in the favor of the supplier, high differentiation of supplier products and if they can credibly threaten to produce the industry product themselves. (Magretta, 2012)

The threat of substitutes, a substitute is a product or service that can meet the same industry need, but in a different way. Substitutes are often more difficult to anticipate on because they often suddenly appear. The threat of a substitute can be assessed by evaluating price-performance trade-off. Switching costs play a big role in assessing the threat of substitutes. (Magretta, 2012)

Perceived entry barriers of the industry determine the threat of new entrants. It has two negative effects on profitability, on one hand, it caps prices (higher prices make the industry more attractive for newcomers) and on the other hand, industry organizations typically have to spend more time to satisfy their customers. Determining factors for the threat of new entrants are economics of scale and the threshold to attain them, switching costs, network effects, investment costs for admission, other perks (not size) that incumbents have on new entrants, government policies and industry retaliation on newcomers. (Magretta, 2012)

The more intense the rivalry among existing competitors is, the less profitable the industry will be. Rivalry has to be looked at in the broad sense and can manifest on prices, advertising, new product introductions and increased product service. This type of rivalry is likely to be great if there are many competitors or if they are equal in size and power, industry growth is generally slow, high exit barriers and if rivals are irrationally (not just for financial performance) committed to the business. (Magretta, 2012)

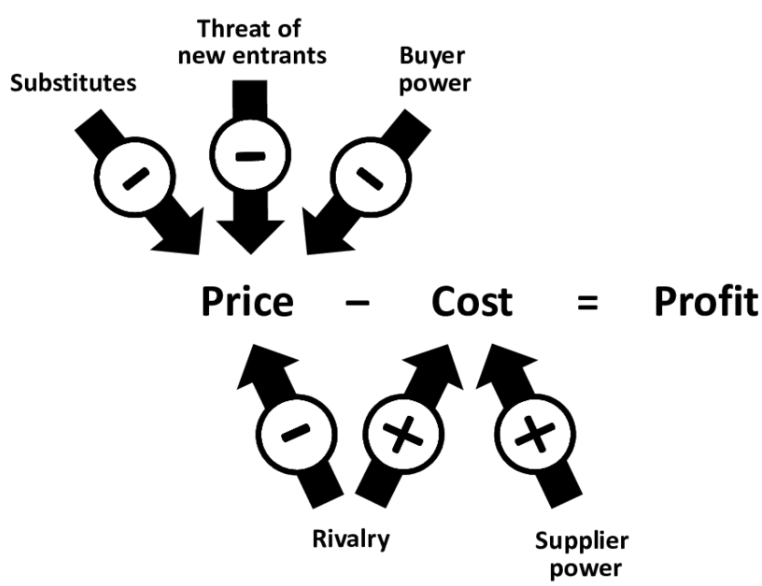

Figure 7 How the forces influence profitability (Magretta, 2012).

The collective power of the five forces determines the average profitability through their impact on prices and costs. A good analysis of these forces gives insight in current industry dynamics and how best to position your company in order to maximize profits. A good strategy is one that produces a P&L better than industry average. According to Porter, strategy explains how an organization, faced with competition, will achieve superior performance. Superior performance, thus outperforming competition, is always related to financial performance and can only be achieved by operating at a lower cost, commanding a premium price or both. Outperforming competition is referred to by Porter as having competitive advantage (Magretta, 2012).

Steps in an industry analysis using porter's five competitive forces

We start by defining the relevant industry by both its product scope and geographic scope. As a second step, all players constituting each of the five forces are identified and, if needed, segmented into groups. Next, the underlying drivers of each force are assessed. After the current industry structure is clear, we will analyse recent and likely future changes for each force. Finally, we will determine efficient positioning in relation to the five forces.

Determining strategy

After assessing the industry's forces and the underlying drivers of each force a company can match its own strengths and weaknesses to determine where it is most likely to be successful. This strategic positioning entails devising a plan of action that can include:

1. Positioning the company so that capabilities give the best defence against the forces
2. Influencing the balance in the force to improve company position
3. Anticipating future changes in the forces to exploit

Positioning the company takes industry structure as fixed and will match company strengths and weaknesses to the power of the forces. The goal is to defend against the power of the forces, either by positioning where the forces are weak or where the company's strengths lie. This way a company determines where to choose for competition and where to avoid it. When trying to influence the balance, companies will adopt an offensive strategy trying to change the power of the forces through specific strategic decisions. Lastly, a company can try to forecast industry changes and try to exploit the change. Industry changes have to be evaluated in relationship to the forces, the most important changes are those that have an impact on competition (Porter, 1980). An appropriate time horizon for determining strategy is three-to-five years for most industries (Porter, 2011).

Practical application of the framework

Many people can name the five forces, but not many really understand what Porter means by them and how to use them thoroughly in an analysis. If the understanding is shallow, at best, the analysis will be incomplete, inaccurate and unhelpful. At worst, it can lead to disastrous organizational outcomes through poor decision-making brought forward by misanalysis. Dobbs (2012) recognised this problem and designed five (one for each force) templates to help conduct the analysis thoroughly and get valid, usable results. For our analysis, we will make use of the templates designed by Dobbs.

PESTEL

The macro-economic environment an industry resides in, inevitable has an impact on the functioning of an industry and can give valuable insights to refine projections on industry trends and drivers. We will discuss the different variables and illustrate through examples.

Political factors are focused on policy, both on a national and a federal level. Examples of political factors are tax policy and trade policy. The economic component aims to examine all economic issues that might have an impact. Examples of this category are inflation, interest rates, economic growth and the unemployment rate. The social factor assesses the impact of the socio-economic environment on the market. Examples of this category are demographics, cultural limitations, lifestyle and education. Through the technological variable, we assess the impact of technology on the industry. Examples of technological factors are technological advancements, lifecycle of technologies and the role of the internet. The legal factors include all legislation that affects the industry, this legislation can be on a national, a federal or a European level. Examples of this category are discrimination laws, health and safety laws, consumer protection laws and copyright and patent laws. The final category are the environmental factors impacting an industry. Examples of this category are climate changes, waste management and the use of eco-friendly products and practices (Frue, 2020).

Methodology

To answer our research question, ‘What is the most successful and sustainable strategy for a facility multi-service provider in Belgium?’, we followed the main steps of a Five Forces analysis as described by Magretta (2012) and used the templates created by Dobbs (2012) for the practical execution of the analysis. These six steps are:

1. Define the relevant industry by both its product scope and geographic scope
2. Identify the players constituting each of the five forces and, where appropriate, segment them into groups
3. Assess the underlying drivers of each force
4. Step back and assess the overall industry structure
5. Analyze recent and likely future changes for each force
6. How can you position yourself in relation to the five forces

The results of the PESTEL analysis are taken into account during step five of the Five Forces analysis. As discussed, the analysis should give insight where or how it is possible to ‘compete to be unique’, therefor we conducted research to our top five competitors and assessed their value propositions.

To conduct our research, both internal (knowledge within FSGBE) and external sources were used. For step two, interviews with experts per main facility service were conducted to identify the players that constitute each force. Input for step three and the PESTEL analysis is collected via market research.

With industry structure and the nature of competition clear, we formulated a strategy in relation to current forces and expected future changes.

Market research

We started by conducting market research. Our market research was twofold, we started with a survey using LinkedIn as a channel. The goal of the survey was to gauge after industry perception on the Five Forces and the PESTEL variables. The results we gathered via the survey were further detailed through researching other relevant sources. Secondly, we did a competitor analysis via trendstop.knack to gain insight in how our main competitors position themselves in the market.

Five Forces & PESTEL

Survey set-up

The survey was distributed via a paid LinkedIn campaign. During a period of three weeks, LinkedIn posted our survey in the feed of our target group. We targeted both on relevant work experience and on skills. For relevant experience, LinkedIn profiles with at least middle management experience in FM were targeted. With regards to relevant skill, we targeted those who attributed themselves the skill of 'Facility Management'. Geographically we focused our targeting to Belgium, we targeted both Dutch and English LinkedIn profiles in this region. The survey was drawn up in Dutch and English to accommodate both language profiles. There were a number of questions for which the scale was inverted, scores on these questions were inverted during the analysis of the results. As an incentive for participation we raffled out five books, English respondents have a chance on winning 'No Rules Rules' by Reed Hastings and Dutch respondents have a chance on winning 'Gigantisme' by Geert Noels.

Figure 8 Graphic of the English LinkedIn campaign

Our survey contained 15 multiple-choice questions related to one or more forces and 10 questions related to a PESTEL variable (appendix A). We limited the total number of questions of the survey to 25 to maximise the completion rate and not scare of respondents by the workload of the survey. Because the number of interview questions was limited, we made a first evaluation on relevant topics and for questions relating to the Five Forces, gave preference to questions that related to more than one force. The survey was set up using a six-point Likert scale ranging from ‘completely agree’ to ‘completely disagree’. We choose deliberately for a six-point scale to limit middle-of-the-road answering and force respondents to take a position on each question. Open answer boxes were included to provide respondents with possibility to give extra context on their answer, answering the box was kept on a voluntary basis to keep the threshold for completing the survey as low as possible. For the same reason we kept the amount of metadata on respondents limited and only made job title a mandatory question.

Five forces

Each force had a number of relevant questions in the survey to assess its relative strength. There were five questions related to the power of buyers. To get an indication of this power, we included questions related to buyer price sensitivity, product differentiation, availability of substitutes and the cost of switching. There were three questions related to the power of suppliers, these questions focused on necessity of third-party partnership to perform services, the availability of suppliers and the cost of switching between suppliers. To gauge the rivalry among competitors, we included five questions related to product differentiation, switching costs, customer loyalty and industry fragmentation. Threat of substitutes was explored via three questions related to alternative solutions to meet a need, cost of switching and buyer price sensitivity. Lastly, we included four questions related to entry barriers, effects of economies of scale and cost of changing to gauge after the threat of new entrants.

The survey gave us an indication how companies in the market assess the industry, we made these indications more concrete via focused research on the drivers behind each force. Throughout we keep the focus on multi-service facility service providers, however where relevant we deep dived in to one or more individual services. To assess the threat of new entrants we took into account economies of scale, product differentiation, capital requirements, other cost disadvantages independent of size, access to distribution channels and government policy. For the power of suppliers, we assessed industry supplier fragmentation, supplier product differentiation, substitute products, forward integration and importance of the industry as a market for the supplier's products. To assess the power of buyers, we assessed purchase volumes, differentiation of industry products, product cost in relation to buyers total cost, profitability of buyers, product importance to buyer core process, product's saving potential and buyer backwards integration. The threat of substitute products is assessed by availability of substitutes and the price-performance trade-off. Lastly, rivalry among competitors was assessed through competitor size analysis, industry growth, product differentiation, switching costs, fixed costs, capacity augmentation, exit barriers and the amount of difference between rivals.

PESTEL

Because the number of questions was limited, we had to choose which variables to include and how much emphasis to put on each variable. Because we deemed Political variables as less likely to have an impact, we excluded them from the survey. We included two questions in relation to the Economic variable. The two questions gauged after market growth dependency on other industries and change in customer buying power. We included one question related to the Socio-cultural variable, this question gauged after the indirect effect social and cultural trends have on the FM customers via the effect they have on their employee desires and needs. Concerning Technological variables, we expect them to have a big impact on the FM industry therefor we included three questions. The questions were on impact of technology, development of smart buildings and boundaries for acceptance of technologies. Both on the Environmental and on the Legal variable we included two questions. The Environmental questions were focused on customer perception of environmental impact and impact of environmental policies. The Legal questions were on the cost of permits and certificates and impact of changes in labour law.

In line with the additional research we did on the five forces, we concretized the influencing PESTEL factors further through research on other relevant sources. We assessed economic growth through GDP variation, both national and sector specific. To gauge the impact of socio-demographic factors, we assessed general demographics and societal trends connected to them. We concretized technological innovations and products that are likely to have an impact. Finally, we assessed the possible environmental variables and relevant legislation affecting the industry.

Competitor analysis

Our goal was not to map out the entire field of Belgian facility services providers, but to get an overview of the main players and their market positioning. To assemble a top five soft FM multi-service providers we used two criteria, revenue and number of soft FM services provided. We made use of the Trends Top online database (www.trendstop.knack.be) to compile our top five. The Trends Top database contains data from all published financial statements from the Nationale Bank van België (NBB) and the Kruispuntbank van Ondernemingen (KBO). Four search terms referring to individual FM services are used to distinguish relevant companies, CLE (Cleaning), CAT (Catering), SAF (Security) and FAM (Facility Management). From the search results, we excluded single service providers and non-relevant results. As a final step, we selected the five companies with the highest revenue for the last published year (2019). To assess services and positioning we analysed marketing data on the websites of the selected companies. Only companies that provide at least the before mentioned services were withheld.

Five forces templates

In his templates Dobbs (2012) included the main drivers underlying each force. Using the information that we gathered during our market research, we scored each individual driver on the given scales and identified the driving forces for the industry. Having a global view on the driving forces, we identified opportunities and threats per force.

Results

Market research

A total of 28 people completed the survey, eight of which completed the English survey and 20 completed the Dutch survey. On average, it took respondents 5’48” to complete the English survey and 06’18” to complete the Dutch version, the completion rates were respectively 5% and 16%. We noticed a big difference in completion rate between both surveys, the Dutch survey was more often completed after opening (attachment J). The first 15 questions of the survey are in relation to industry dynamics, while the last 10 questions are related to the macro-economic environment. We will discuss these results separately underneath.

Five forces

Power of buyers

Respondent are slightly in agreement with the statement that price is the most decisive criterion in a facility tender. Extra comments were made that quality is equally important and that there is an impact of the procurement department on the end price. One respondent stated if the tender is made up out of the right specifications, price is the most decisive criterion. When it comes to product differentiation, respondents indicate that there is a big difference between products and services of different facility service suppliers. With regards to buyer price sensitivity, respondents indicate that facility service providers cannot easily raise prices without it having negative effects on sales volumes, thus that buyers of facility services are price sensitive. When it comes to effort/cost of switching suppliers, respondents indicate that making the switch takes a lot of effort. One of the respondents replied that it takes up to a year to make the switch, while another indicated the switch could be facilitated by including the right clauses in the initial contract. Additional research results that constitute the power of were:

- Diane Kearn (2011) describes the three main drivers for outsourcing as cost savings, putting the focus on core business and gaining flexible access to a specific set of skills. Her findings are in line with customer feedback we get, most of our customers are moderate to high revenue and decent margin companies. These companies have more to gain by focussing on their core process rather than becoming an expert in the field of facilities.
- At a C-level the impact of FM is often underrated, rarely it is seen as key to company strategy. With the impact of FM on achieving company strategy not always clear, the FM related costs are crystal clear. The Occupier Cost Index (OCI), an index based on the European Norm for Facility Management (EN15221-4) that indicates office related costs per Full Time Equivalent (FTE), states that in 2020 the average FM costs for a Belgian office building are €11.972 per FTE (Colliers, 2020). For FSGBE the clients outsourcing FM in a multi-service formula have a workforce ranging between 500 and 2.500 employees. Using the OCI to estimate budget through workforce size, this means that budgets range from respectively 6MIO to 30MIO, quit a substantial amount contributing to buyer strength.
- When companies outsource FM in a multi-service formula, a substantial part of their operating budget is outsourced which makes for big buying orders. Since it is time consuming to execute a tender of this type and size, most often minimal contract duration is three years going up to five years.

- In the FM industry, around 80% of costs are related to personnel, wage scales are fixed by joint committee and freely accessible to all. With all information easily accessible, a buyer often holds information advantage over sellers.
- With regards to backward integration, the risk is minimal since customers are looking to outsource these services rather than to keep doing them their selves. Only takeover of personnel is sometimes on the table, but this risk is easily mitigated by including the right takeover clause in the contract.
- Contrary to survey results, we found that differentiation possibilities are minimal for most of the individual services. The main difference that can be made is not in the service that is provided, but rather in the staff providing the service.

When plotting our findings on the template (appendix B) we identified limited product differentiation, a big contribution of FM to total buyer costs and a minimal impact of the products/services to buyer core business as driving forces. As main threat from this force, we found the possible further commoditization of the separate services because of a further decrease in differentiation. We also found two opportunities, the first one lies in cost reduction. Since FM represents a substantial part of a buyer's overall costs, an opportunity can be to focus on cost reduction. The second opportunity is to focus on markets where the added value of FM to the core process and company strategy is greater and consequently buyer price sensitivity will be lower.

Power of suppliers

Respondents of the survey find that service quality of a facility service provider is highly dependent on their suppliers and third-party partnerships. Respondents indicated that costs for switching suppliers are low for facility service providers. At the same time, they indicated that there are enough suppliers in the market to switch. Additional research results were:

- Supplier concentration is mediocre and in general purchased volumes are quit high
- Supplier products are rather standardized, going from soap and mops to base materials for cooking and outfits for security guards.
- Each single service division has its own union and in case a division employs on average at least 50 employees, a committee for welfare and prevention has to be established. Since people provide FM services (security agents, cleaning staff, facility managers, reception hosts,…), the threshold of 50 employees is easily reached.
- Switching between suppliers is fairly easy and, unless there is a rental or leasing agreement in place, does not come at a great cost. There is one exception with regards to switching cost and that is IT suppliers. FM organisations often use a Facility Management Information System (FMIS) to guide operations, set-up costs for these systems are substantial and switching cost both monetary and in terms of time are big.
- Forward integration is an issue for some parts of our services, none of our suppliers are able or will soon be able to take over the total service offering. Two examples of forward integration the industry recently got to deal with were interior waste management and food walls. Cleaning companies traditionally collect and transfer waste from the interior to an on-premises waste storage point, from there on waste handers collect and further process the waste. Recently some waste handling firms also offer services collecting and sorting waste interior before storage in the on-premises point, thus threatening to take over a part of our business. We also saw some suppliers of liquid vending products coming to the market with food walls, competing with our catering offerings. These

forward integrations do not threaten us for multi-service contracts, since the suppliers cannot offer the total package solution.

When plotting our findings on the template (appendix C) we found that there are three main drivers for this force. The Belgian FM market is one with a high supplier concentration for standardized product and FM service providers purchase high volumes. We identify two opportunities through this force. The first opportunity lies in the strong negotiation position FM service providers have for volume discounts and kickback fees. The second opportunity lies in the possibility to integrate supplier products and services to own offerings in a total-package solution through subcontracting. Although suppliers are currently perceived as a weak force there does lie a threat to multi-service suppliers through supplier forward integration. Suppliers will never offer the total solution package, but they could destabilize our service through the single service market. To offer multi-service offerings a provider remains dependent on their single service market services for revenue, volumes and flexibility in workforce deployment.

Threat of substitutes

Respondents indicated that buyer switching costs have an impact on the threat that substitutes pose. If the cost of switching from current supplier is high, clients will be less inclined to make the switch, also to a substitute product. The respondents indicated that outsourcing facility services is not the only way to meet their needs, but it is the most preferred one. Further research results relating to the threat of substitutes were:

- The only substitute for a multi-service outsourcing of FM is a total insourcing. To set up an entire FM organisation is an immense job that most likely will not generate the same quality and have a much higher cost, so this threat is not credible.

- For parts of our total package solution, there are substitutes that sometimes give equal quality at the same or a better price. For instance, deploying cleaning robots in an open space without much obstruction will cost less than performing manual labour. The substitute performance-price-trade-off has to be evaluated separately for each substitute under the specific conditions of its deployment.
- Buyers are price sensitive and thus will look at better performing options with great interest.
- Generalizations on buyer profile cannot be made as they are determined by the characteristics of the FM or procurement department of each specific customer.

Through plotting our research finding on the template (appendix D), we found two driving forces behind the power of substitutes. Both buyer price sensitivity and substitute price/performance trade-off are likely to be driving forces. Total insourcing is the only substitute for FM total outsourcing and insourcing is highly unlikely once the organisation is set up through outsourcing. There lies a big opportunity, as there can be a customer lock-in effect once FM is outsourced. As discussed in the power of suppliers' results, an FM multi-service player is always active on the single service market and relies for it services on performance in this market. Therefor a destabilization of a single service market through a substitute product performs better at the same of a cheaper price can have its effect on the multi-service market. The main threat lies in price/performance trade-off, however not yet favourable for any substitute, if future developments increase the performance side of the scale, the price sensitive buyers will be looking with great interest.

Threat of new entrants

Survey respondents indicated that buyers have to deal with time and effort as switching cost, this might have a negative effect on the attractivity of an industry for new entrants. Furthermore, they indicate that economies of scale play an important role for facility service providers and can only be achieved by the biggest players in the market. Finally, the survey results indicate that a newcomer to the market has to make substantial investments in order to enter. These investments are either in personnel, real estate, assets or their knowledge base. Additional findings that contribute to the strength of this force were:

- There are supply-side economies of scale in coverage, supplies and consumables and overhead. A big player with national coverage can easily scale up to meet a need in a certain region without their workforce having to commute extensively. With regards to supplies and consumables, framework contracts make for premium prices for most products as well as possible end-year kickbacks. Synergies in overhead structure can be realized through keeping the middle and upper management structure efficient and lean.
- In the facilities industry, image and brand awareness are key to score big accounts and premium clients. Relevant expertise is always a prerequisite for selecting possible candidates. Without a number of big accounts as suitable references, other big accounts are hard to acquire. Therefore, there are mild first mover benefits due to references and brand awareness.
- All major multi-service players historically have started as single service provider. To start immediately as a multi-service provider is nearly impossible, due to immense amount of expertise in completely different domains and substantial investments needed in capital, human resources and licenses. A new entrant in the multi-service industry will

most likely come from a fast growing single service provider who broadens its product portfolio through acquisitions and/or expansion.

- Most commonly used distribution channels in the industry are company websites, LinkedIn marketing, direct advertisement, trade union, word-of-mount, corporate events,… Incumbents already take strategic marketing partnerships that create a lot of visibility, like being preferred partner to the Belgian Facility Management Association (Belfa). Apart from these few strategic high visibility partnerships there is little to no competition over channels, newcomers have easy access to them.
- Each individual service has its own regulation, necessary licenses, joint committees, unions and legislation. A few examples are the HACCP legislation for catering, the 'wet Jambon' for security, ABSU for cleaning, etc. Adhering to all these legislations and dealing with different unions is very time consuming and requires a lot of specific knowledge.
- When a single service provider expands to multi-service provider, they will not face direct retaliatory actions from incumbents.
- There are mediocre capital requirements per service. The lion's share of costs in providing facility services to a market lies in personnel. Investment in assets are limited to fleet, consumables and infrastructure (mostly for catering).

We plotted our research results on the template (appendix E) and found driving forces in supply-side economies of scale, demand-side benefits of scale and incumbency. Supply-side economies of scale are achievable, but only the biggest players can get access to them. National coverage, volume discounts and kickback fees are the three main advantages. Demand-side economies of scale are achievable through network effects, they mainly have their effect through brand awareness and obtaining relevant references. Two main opportunities we find through analysis of this force are maximising economies of scale and maximising efforts to secure big multi-service accounts. Economies of scale can be maximised through efficient procurement efforts and fixing long-term rates through supplier framework agreements. Because buyer end-price in a total package deal is influenced by supplier prices, chances on winning a tender will increase. Since relevant references are a prerequisite to participate in big multi-service tenders, efforts should be maximised to ensure acquiring new accounts and prolonging existing contracts. If incumbents gain all new accounts, new entry to the market gets nearly impossible. The biggest threat comes from single service providers that expand product portfolio through strategic partnership, acquisitions or joint ventures.

Rivalry among competitors

We already discussed the responses regarding product differentiation and the cost of switching for buyers. In addition to those two results, the respondents also indicate that a few big players dominate the Belgian market for facility services and, in general, customers are loyal to their suppliers. Although respondents indicate that there is differentiation between the products and services of different service providers, the difference in service quality is minimal. Hereunder we provide extra context to the strength of this force:

- For single services, there are competitors left, right and centre. When it comes to multi-services providers, the field of competitors is much thinner.
- The Belgian Gross Domestic Product (GDP), a measure for a nation’s economic prosperity, has increased by 1.4% in 2019. This increase is just under the average of the European Union (1,5%), indicating that Belgian economy is healthy but not necessarily fast growing. 19.7% of the Belgian GDP is attributed to ‘services to companies’. When

comparing the last ten-year-period, total GDP in BE has increased by 36.5% from 2009 to 2019, during the same period the branch 'services to companies' has increased by 60% (Statbel, 2020).

- FM market growth in Belgium from 2016 to 2018 is in line with the growth of GDP (circa 7%), this indicates that the growth is due to the improved economic climate in Belgium and not so much due to expansion of the FM market (IFMA, 2019).
- In the FM industry workforce is the main resource, so when assessing capacity expansion the focus is on workforce. There can be two ways to start up a new contract and thus having the need for capacity expansion. The first one is taking over an existing contract, in most of these cases the personnel is included in the takeover via sectoral agreements. The second one is starting up from scratch, which means we have to recruit the needed workforce, in practice operational staff is easily recruited.
- An analysis of the tenders we received during a one year period (q3/2020 – q2/2021) showed that multi-service tenders only represented 1.6% (8 out of 490) of the total tenders, but they accounted for over 8% (€8.7MIO on €107MIO) of total tender revenue. During the analysed period, a multi-service tender was on average €1,1MIO in comparison to €205k for the average single service tender (appendix F).
- There are moderate exit barriers in the industry. Real estate is limited to office buildings and minimal warehousing for stock of consumables. Sale of real estate or cancelling the rental agreement is a hurdle easily taken. Long-term leasing contracts, on car fleet and building infrastructure might form an exit barrier, but this can be mitigated by adding the right clauses in leasing contracts. On average a customer contract has a duration of three to five years, the cost of breaking the contract is mostly minimal but walking away from

a few years of certain earnings might form a barrier. The main operating cost is in personnel, if personnel all needs laying of this would amount to enormous costs. However, since the value of a facility service provider is in its personnel, acquiring companies are keen to take over staff.

We plotted our research results on the template (appendix H) and found three main drivers behind this force. There are not a lot of competitors that offer FM multi-service solutions, between competitors there is little differentiation in services and there is a great strategic stake to the FM multi-service market. As a main opportunity, we identify the low number of competitors that compete for a few lucrative tenders. At the moment, there is little differentiation in services provided by all contestants, the opportunity is there for all contestant to maximise differentiation in order to win the few FM multi-service tenders that are launched every year. Here lies also the main threat, if a competitor differentiates more successfully, they are most likely to steal away the most lucrative FM contracts in the market. Taking into account the average size of the multi-service tenders and before mentioned perks in brand awareness and references, it is likely that these tenders get a lot of competitor attention and competition for them will be fierce.

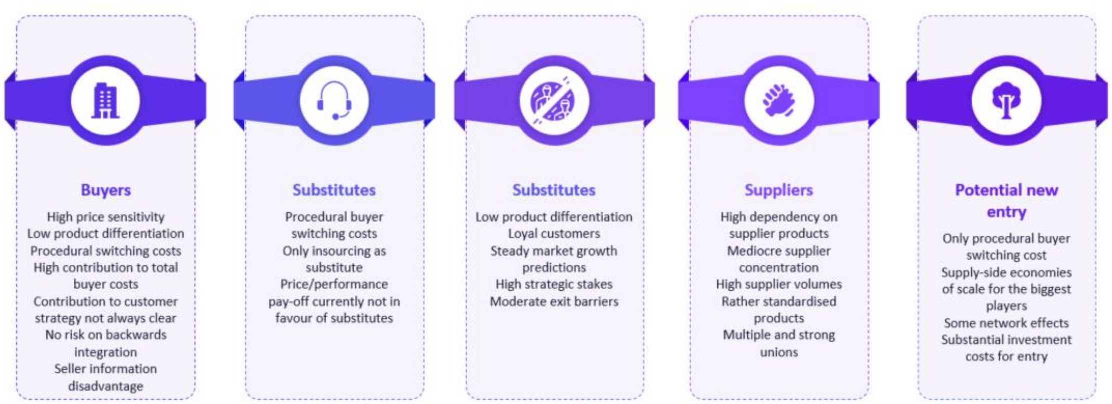

Figure 9 the five competitive forces shaping the Belgian FM multi-service market

PESTEL

The PESTEL results of our market research in the category Economic indicated that for its growth the market for facility services is dependent on other industries and that customers of facility service providers do not have a decrease in buying power. With regards to socio-cultural impact, respondents indicated that societal trends would have an indirect effect on the market for facility services through the impact they will have on the expectations that employees have of their organisations. When it comes to technological variables respondents indicated that both technological developments and the development of smart cities would have a strong impact on the Belgian market for facility services. Although it is expected technological variables will have a strong impact, respondents indicate that at this moment there still are reservations that keep companies investing in them. Environmental variables will have an impact on the market through environmental legislation and policymaking decisions. Respondents indicate that customers will value facility service providers that conduct their business in an environmental friendly way. Finally, the legal impact is also there, acquiring permits and certificates is timely and/or costly and it is likely that changes in labour laws will have an impact on the market. Underneath we describe the additional research results of each variable:

Political

- Labor unions are pushing to raise minimum wages. The operational workforce for all facility services constitutes of people in these wage categories. If policymakers will agree to raise minimum wages, the cost of personnel for FM providers will increase greatly.

- Belgian car taxation policy is changing and fleet costs are likely to increase due to these changes (De Rouck, 2020). Since facility service providers rely heavily on company cars to get there workforce to their customers, additional taxation costs will be felt greatly. Either resulting in higher industry prices or lower service provider margins.

Economic

- In 2018 the total revenue of the FM market in Belgium was estimated at €5.2bn of which circa 48% (€2.5bn) of the revenue accounts for out-sourced services (IFMA, 2019).
- In 2018 the gross domestic product (GDP) of Belgium was €451bn, the FM market accounts for circa 1.15% of the GDP (IFMA, 2019).
- Facility managers expect that in 2022 circa 53% of the FM budget will be used for outsourcing
- IFMA trends report indicates that FM suppliers are ready and eager to provide IFM and Management, but at this moment their customers are not that eager to outsource management (IFMA, 2019).
- In their trends report, IFMA found that 25% of respondents outsource FM to have an increased flexibility. 21% choose for outsourcing due to a lack of internal resources and/or FM skills. 23% indicates that the main reason for outsourcing is the increase in specialized services (innovations and new technologies) for which they do not have the knowledge in-house (IFMA, 2019).

Socio-cultural

- There is a shortage of FM professionals in Belgium, the imbalance between supply and demand is likely to increase in coming years due to two reasons. Firstly there are too few students that choose for FM related education and secondly Belgian FM education is not matched well with market needs (IFMA, 2019).

- Making the organization more customer-oriented was the main goal of the FM department according to the IFMA trend report (2019). Experience of employees and end-users remains a focus point for organizations.
- According to the IFMA trends report (2019) the most important topic influencing FM service providers will be the war for talent, more specifically helping their customers win the war for talent.

Technologies

- Both integration of technology and implementing innovations will be the most important goals for facility managers by 2022 (IFMA, 2019).
- Facility managers indicate there are three main technological topics influencing FM, Facility Information Management System (FMIS), use of mobile apps and big data in buildings (smart buildings and IoT).
- According to 24% of respondents big data in building will be have the biggest influence on FM by 2022. Other technological topics mentioned are Building Information Modelling (BIM), 3D printing and automation by robotics. (IFMA, 2019)

Environmental

- Around 65% of facility managers have environmental goals among their focal points. The top three environmental goals facility managers have are on reduction of energy usage, reduction of greenhouse gas and reduction of waste (IFMA, 2019).

- On a national and international level, there is a great focus on CO^2 reduction and limiting further climate change. Resulting in the formation of Sustainable Development Goals (SDG), the European Green Deal (European Commision, 2018), the European Energy Directive (European Commission, 2015),…

Other relevant findings

- Market research companies (Technavio, 2019; Infinity research, 2020 & MarketsandMarkets, 2020*)* predict compound average growth rates (CAGR) ranging from 10,6% to 14% over a four year forecast period. Main drivers for this growth include increase in demand for cloud-based facility management solutions, rise in demand for integrated facility management and intelligent software, increase in adoption of Internet of Things (IoT) along with analytics and Artificial Intelligence (AI), and shift in office environments and workplace.
- Bröchner et al. (2019) define digitalization and sustainability as the trends that have shaped and will shape the future of FM. In their opinion, digitization has a three-way effect on FM, through work support, building design and performance management. According to Bröcher the trends driving FM via work support digitization are mainly big data and IoT, while building design digitalization is driven by smart buildings and activity-based workplaces and performance measurement digitalization is driven by prop tech and big data from real-time condition surveillance. Underlying forces behind sustainability are smart cities and the rise of the sharing economy.
- Enviro Digital (2019) say the integrated facility management is likely to gain traction.
- The Covid 19 pandemic has forced the world to experiment with homeworking and revise current views on usage of office space (Molla, 2020). Whether the impact will be a

reduction of square meters, a revision of office fit-out or a combination of both, it will have some impact on facilities and the companies providing them.

Competitor analysis

Using turnover as the main criterion we assembled the top five FM multi-service providers for the Belgium market (appendix I). Six top ten organisations were excluded because they did not meet the criteria for multi-service provider. Securitas, G4S secure solutions, Compass Group Belgilux, Iris Facility Solutions and Laurenty were excluded for not meeting the multi service criterion. This exclusion left Sodexo Belgium, ISS facility Services, GOM (part of Facilicom Group), Cleaning Masters (part of Multi Masters Group) and Atalian as the top five FM multi-service providers in the Belgium market. We composed total turnover per multi-service provider by computing all revenue of related subsidiaries (appendix I).

Sodexo Belgium ranks its FM offerings under Food Services, Administration of Facility Services (includes cleaning, facility management and reception services), Security Services and Workplace and Technical Services. As an extra service, Sodexo also provides Benefits & Rewards Services, which entails a multitude of vouchers (meals, eco, gifts, sport, culture and training) and a voucher platform. The value proposition of Sodexo is: we improve the daily life and wellbeing of everybody we supply our services to, all our services contribute to a better quality of life.

ISS Facility Services describes its services as Cleaning, Catering, Support Services (includes Reception Services and Facility Management), Technical Services, Workplace Services, Security Service and Covid 19 solutions. The value proposition of ISS is: we connect people and places to make the world work better. Through working side by side with our customers on a daily basis, we understand every aspect of the user experience and our staff is able to handle problems and take chances when they occur.

Multi Masters Group includes a host of subsidiaries that cover most FM services, subsidiaries include; Cleaning Masters, Construct Masters, Techni Masters, Mobility Masters, Maintenance Masters, Hygi Masters (pest control), Green Masters, mobility masters, catering masters and Security Masters. Multi Masters have a new offering already on the website, Safety Masters will offer fire/safety lookouts and rental of safety equipment. The value proposition of Multi Master Group is similar to that of Facilicom: we ensure, through the provision of a wide range of services, companies and organization all over Belgium are able to concentrate fully on their mission.

Atalian's offerings are facility management, cleaning, catering, technical maintenance, hospitality, energy management, greenery and security. The value proposition of Atalian is: We enable organizations to focus on their core business and improve performances by caring for our people and their environment.

Conclusion

Product and geographical scope

The industry can be best defined as the Belgian industry of outsourced FM multi-services. Multi-services entail all facility soft and hard services.

Players per force

Our buyers are companies that source out multiple FM services. These companies often have a mediocre to big office space (>5.000m²) and have a workforce of above 250 employees.

We deal directly with procurement, facility director or manager and real estate directors. Our suppliers can be divided in two groups, the first one are supplies needed by subsidiaries to perform their services and the second one are FM services that we provide to the market via third parties. In the first category, we find suppliers of consumables, raw food material suppliers, clothing suppliers, kitchen builders, division specific soft- and hardware providers, external quality control agencies, unions and joint committees. The second group includes providers of greenery, pest control, sanitary supplies, technical building maintenance, waste management, vending and office supplies. The four main competitors are Atalian, ISS, Multi Masters and Sodexo. For multi-service outsourcing, the only substitute is insourcement. For individual services there are, next to insourcing, different alternatives. Robots can in certain circumstances, clean facades, windows and parts of buildings. Alternatives for office catering are external delivery services and food walls. A manned reception desk can be replaced by a virtual reception. Smart cameras can substitute security agents on premises. All single service providers in each of the individual facility services can be considered possible new entrants through portfolio expansion or acquisitions.

Underlying drivers of each force

Buyer power is quite substantial in the industry and has three as main drivers. There is limited differentiation in products, there is a substantial contribution of FM to total buyer cost and minimal impact of FM services to buyer core business. The power of suppliers is rather weak, it is driven by a high supplier concentration, mainly standardized supplier products and high volume purchases by FM service providers. The threat of substitutes is mediocre and driven by buyer price sensitivity and substitute price/performance trade-off. The threat of new entry is rather weak and has three main driving forces in supply-side economies of scale, network effects through brand awareness and first mover benefits. Rivalry among competitors is relatively high and driven by a limited number of competitors, low service differentiation and the strategic stakes that are attributed to this market.

Recent and likely future changes in the forces

There are many indications that outsourcing of IFM services will increase in the future (Enviro Digital, 2019; IFMA, 2019; Infinity research, 2020; MarketsandMarkets, 2020; Technavio, 2019). If incumbents can secure the multi-service contracts, they can increase own economies of scale and network effects, thus further strengthening their own position against possible new entrants. With an increase in volume, the bargaining position against suppliers is strengthened.

New technologies and innovations (IoT, big data in buildings, FMIS,…) will have a big impact on the FM industry (Bröchner et al., 2019; IFMA, 2019; Infinity research, 2020; MarketsandMarkets, 2020; Technavio, 2019) and the current shortage of skilled FM professionals will increase (IFMA, 2019). The effect of new technologies on the industry of FM multi-services is twofold. On the one hand, it will support the FM service suppliers in achieving higher quality standards and working more effectively and on the other hand, these technologies are likely to automate parts of the services currently provided by FM service providers. Thus, the threat of substitutes will increase if price/performance trade-off increases and a part of industry profitability is likely to shift to the suppliers. Since new technologies require more skilful FM professionals and these are likely to be scarce, the war for FM talent will kindle. Competitive rivalry is then to increase and FM suppliers will need to pay premium wages to attract and retain talent.

Customers are keen on winning the war for talent and the needs and desires of that talent are influenced directly by societal trends. Predicting the evolution and impact of societal trends can give facility suppliers the upper hand in competing against buyers.

How can you position yourself in relation to the five forces

There are three strategic actions possible, a company can assess the best position to take in relation to the current forces, strategic decisions can be made in positioning against expected changes in forces and a company can actively try to alter the forces. We will discuss all three underneath.

Positioning the company in the industry

Buyers are the most powerful force in the industry and their power is likely to increase if product differentiation decreases further. There are two positioning possibilities towards this force, the first one is in exploiting price sensitivity of buyers. Facility service suppliers can offer the most basic services at bottom prices and try to beat competition through price competition. A second strategy of positioning against buyers focusses on playing in a part of the field where buyers are less powerful because services have a bigger impact on business strategy, this will have an effect on buyer price sensitivity. One of the main focal points for organisations is winning the war for talent through providing an excellent office experience for their employees. Office experience comes mainly through the number and the quality of the office facilities. Because winning the war for talent is core to company strategy, these companies will be more likely to pay a premium for better quality services. This approach requires efforts to differentiate through marketing, branding and targeting. It is the second approach that has our preference as it will also have a positive effect on other forces through an increase in differentiation.

Suppliers are a relatively weak force where FM service suppliers can maximise profitability through volume discounts and kickback fees. In order to push volumes up, the number of different suppliers for one product or service should be kept at a minimum. Framework agreements need to be in place and periodically revised. The effect of these framework agreements will also have a positive effect on chances for winning tenders, as supplier prices determine FM supplier end-prices. This gives an advantage bargaining with suppliers.

The only substitute for total FM outsourcing is insourcing, it is highly unlikely that a company will switch from outsourcing to insourcing. This lock-in effect contributes to the low threat of substitutes. To exploit this lock-in effect, FM service suppliers can push their own current single service customers to outsource more services. Locking in customers also ensures supplier volumes stay high and references needed for gaining access to other tenders are available, this strategy further limits the bargaining the power of suppliers and limits the threat of new entrants.

There are already quite substantial barriers to entry to the FM multi-service market. To keep and raise these barriers FM multi-service suppliers should be aggressive in maintaining current customers and winning new contracts. This strategy would deny new entrants access to references. Next to the positive effect this strategy will have on the bargaining power of suppliers through further increase economies of scale it is also likely to have the opposite on competitive rivalry. Since FM multi-service tenders only represent a small, but lucrative portion of the total FM tenders, an aggressive approach is likely to spark competitive rivalry.

Competitive rivalry is quit a strong force and before mentioned tactics will only contribute to its intensity. With a limited number of competitors and a growing market, incumbents are best off fending of possible new entrants to keep the competitor field in a status quo. By keeping new entrants to a minimum, the level of rivalry between incumbents might decrease due to projected market growth.

Exploiting industry change

Research shows that FM multi-service outsourcing will gain traction in the future, however we do not expect a big effect on competitive rivalry. Since the projected growth is not of that nature that tenders will be numerous, competition among incumbents will remain fierce. We do not expect much new entrants in the market, the biggest threat on entry comes from single service providers that expand product portfolio through strategic partnership, acquisitions or joint ventures. The effort to make an entry remains substantial and incumbents have hold all cards to prevent entry through winning new tenders and prolonging current contracts.

The war for talent is expected to be a hot topic in years to come, to attract and retain talent it is necessary to understand employee needs and societal trends. An FM service provider who is able to align his services to societal trends to meet employee needs could gain competitive advantage.

Currently most technological substitutes are not viable alternatives to traditional FM services, which are mainly performed by people. They are not viable yet, due to the negative price/performance trade-off. However, we expect that this trade-off will shift during the coming years. A few concrete examples are cleaning robots, automated window washing and deployment of robots for security purposes and reception services. These technological evolutions will shift a part of the industry profitability to the suppliers. Since it is customary in an FM multi-service contract to include third-party services through subcontracting and the third parties cannot offer an FM total package solutions themselves, there is no threat for forward integration in the FM multi-service market. There is however a risk for forward integration in the single service market. Since FM multi-service providers are dependent on this market for revenue, the multi-service market might be destabilized via the effect on a single service market. For each of the single services an industry analysis is needed to determine the right positioning in order to defend against this threat.

New technologies coming forth from IoT, FMIS and big data developments require more skilful FM professionals. The projected increase in shortage of skilled FM professionals could bring forth an unbalance in workforce supply and demand, resulting in an increase in personnel cost and in intensity in the war for FM talent. FM service providers can mitigate the risk for shortage of skilful FM professionals by setting up own training manuals and programs focused on needed skills and knowledge.

Shaping industry structure

There is little very little differentiation between offerings and value propositions of the biggest players. Two players (ISS and Sodexo) have value propositions related to increasing wellbeing of their customers' employees and the other players (FSGBE, Atalian and Multi Masters Group) value propositions' are focused on allowing customers to focus on their core process. The value propositions of the five main players are very similar and it would appear that they are formulated from the service provider's perspective rather than from a customer's perspective. Since the key to influencing the bargaining power of buyers' lies in differentiation, FM service providers can identify the piece of the market they want to serve and align offerings in line with the needs of those customers.

Conclusion

Our research question was: ‘What is the most successful and sustainable strategy for a facility multi-service provider in Belgium?’ To answer this research question we conducted a five forces analysis on the Belgian market. Our results gave insights in market dynamics and best way for an organization to position itself to be profitable now and in the future.

In short, we can state the power of buyers is the strongest and can mitigated by choosing the part of the field where the contribution of FM to achieving company strategy is strongest. Suppliers are rather weak and players can utilise their position towards this group to maximise profitability. The threat of both substitutes and new entry are both low and can be mitigated respectively by subcontracting and denying possible entrants access to references. Rivalry among competitors is high, differentiation of services and denying new entrants access to references are suitable tactics to keep this force under control.

Future changes are coming from industry growth, technological developments and the need for skilled FM professionals. To exploit future change, incumbents should keep new entry from the market by denying them access to references. They should consider own positioning against future technological developments and put the focus on attracting and retaining FM talent. It can be useful to develop in-house training to prepare for future shortages in FM professionals.

Changing the forces is not evident, it seems the most viable option for FM suppliers is to increase differentiation of services in order to best match the piece of the market you want to serve.

Discussion

Through this dissertation, we have identified general market dynamics and ways for an organization to position itself to be profitable. When applying this to FSGBE, we see discrepancies with the groups positioning towards the forces and our conclusions. We can formulate a few concrete recommendations through which FSGBE can increase profitability. Firstly, the bargaining position against suppliers is one that FM service providers absolutely have to utilize. FSGBE does not fully utilize this position. The group currently lacks clarity on total volumes, does not have enough preferred suppliers and framework agreements are not in place for most suppliers. Procurement has to be viewed on a group-level and to maximize profitability all subsidiaries have to follow the group policy. For FSGBE the first step is a group-wide inventarization of all services and products purchased from different suppliers. Next the total volumes can be used to negotiate framework agreements and based on agreed terms choose a limited number of preferred partners for each service and product. After establishing the right framework agreements, the chosen suppliers should be pushed as much as possible towards current customers to maximize effects. The second recommendation is in relation to the value proposition of FSGBE. The current value proposition is very general and the group lacks a differentiation on offerings for different industries. The group's value proposition is based on the definition of FM and in line with the value propositions of competitors. A value proposition should be appealing to that piece of the market you want to serve, rather than a general description of services and the industry. Since all competitors also lack a meaningful value proposition, FSGBE can distinguish itself by actively searching for the added value it can bring to certain parts of the market and formulate value propositions accordingly. The third recommendation is with regards to the main threat of substitutes, which comes from technological developments. At this moment, it is hard to predict how this impact will manifest and the attitude within FSGBE is to wait-and-see. However rather than awaiting the outcome, FSGBE could actively participate in developing technologies. This approach would give early insights in shortcomings, strengths and likely impact of the technologies on the industry. These insights can be used to adapt positioning and apply sustainable strategies. The final recommendation we want to make is in relation to the projected shortage of skilled FM professionals. Rather than waiting until this problem arises FSGBE can set up training manuals and refine standard operating procedures (SOPs). If the group is able to train workforce itself and deploy it efficiently through a higher level of standardization of procedures, competitive advantage might be achieved.

Our findings give relevant insights in the market for FM multi-service outsourcing. However, since multi-service providers also play in the single service market, it is short of the mark to say that positioning based on our analysis would automatically be in the best interest for the company as a whole. To determine the best strategy, all single service markets should be analyzed using the same framework and only then, the right strategic decision can be made taking into account the effects of the forces.

There are a number of topics relevant to our subject that need further research. The strongest force in our market is the bargaining power of buyers, FM suppliers can identify parts of the market where the suppliers are less powerful and thus chances on profitability are higher. If FM suppliers can identify fields where it is more clear that their services contribute to customer strategic goals, they can identify the most interesting parts of the market to play. Other relevant follow up research can be done on societal trends and their expected effects on employee needs and desires.

When we look critical to the conducted market research, we must conclude that the use of a survey as a mean for our research did not produce optimal results. We used a LinkedIn survey to maximize reach, ensure anonymity to prevent prejudice and utilize LinkedIn's efficient targeting system. To maximize response rate we made multiple-choice questions mandatory and kept the open answer questions optional. Through this approach, qualitative data was likely to be less, but quantitative would be maximized. Eventually response rate was much lower than expected and due to our survey set-up, qualitative input was also limited. Validation of this dissertation's assumptions and conclusions via focus groups or qualitative interviews with representatives of all forces can be valuable follow-up research.

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Appendix A Survey questions

Analysis	variable measured	question	average score
5 forces	power of buyers	price is the most decisive criterion in a facility tender	3,64
5 forces	power of buyers rivalry among competitors	there is a big difference between the products and services of different facility service providers in the Belgian market	2,71
5 forces	power of buyers	a facility service provider can easily raise prices without having a negative impact on their sales volumes	4,04
5 forces	threat of substitutes rivalry among competitors threat of new entrant power of buyers	it takes a company a lot of effort and/or costs to change from one facility service provider to another	2,96
5 forces	threat of new entrants	economies of scale play an important role for facility service providers	2,39
5 forces	threat of new entrants	economies of scale can only be achieved by the biggest players in the market	3,07
5 forces	rivalry among competitors	the Belgian facility market is dominated by a few big players	2,86
5 forces	rivalry among competitors	Generally speaking, companies don't often switch from one facility service provider to another	2,93
5 forces	rivalry among competitors	there is not a big difference in service or product quality between the different facility service providers in the Belgian market	3,43
5 forces	threat of new entrants	a new facility service provider has to make big investments (personnel, real estate, assets, knowledge base,...) before they can enter the market	2,61
5 forces	power of suppliers	the quality of products and services provided by facility service providers are heavily dependent on their suppliers and third-party partnerships	4,50
5 forces	power of suppliers	a facility service provider has a lot of different suppliers and partners to choose from within the Belgian market	3,57
5 forces	threat of substitutes power of buyers	for most facility needs or problems outsourcing is not the only option	3,93
5 forces	threat of substitutes	outsourcing facility services is the most preferred option by most companies	2,96
5 forces	power of suppliers	a facility service provider can easily switch between suppliers	3,50

PESTEL	Economic	Growth in the facilities market is very dependent on other industries	4,11
PESTEL	Economic	Customers of facility service providers have seen a decrease in buying power	3,43
PESTEL	Socio-cultural	societal trends have an indirect effect on the facility service providers, due to the effect they have on the needs and desires of the employees of their customers	4,79
PESTEL	technological	technological developments will have a strong effect on the Belgian market for facility services	5,04
PESTEL	technological	The development of smart buildings will have a strong impact on the Belgian market for facility services	4,75
PESTEL	technological	Currently, there are still reservations that keep companies from investing in technological developments that will have an impact on facility services	4,25
PESTEL	Environmental	Facilities suppliers that conduct business in an environmentally friendly manner is highly valued by customers in the facilities market.	4,50
PESTEL	Environmental	current and future environmental policy and legislation (national & international) have a big impact on the Belgian market for facility services	4,71
PESTEL	Legal	acquiring permits and certificates requires a great investment (time and/or budget)	4,57
PESTEL	Legal	it is likely that changes in labor laws will have a big impact on Belgian market for facility services	4,14

** Scoring of the survey was on a scale of one to six, for interpretation 3,5 should be taken as the mean*

Appendix B Template bargaining power of buyers

***Threat of Buyers/Buying Groups*[*] ( )**

DF[†]	Low	THREAT LEVELS	High
☐	Single/Few	Buyer Orders	Large Volumes
		big buying orders, decent contract duration (3-5y)	
☐	Low	Buyer Information	High
		information is easily accessible	
☐	Not Feasible	Buyer Backward Integration	Credible Threat
☒	Highly Differentiated	Industry Products	Standardized
		fairly standardised products and services.	
☐	High	Buyer Switching Costs	Low
		Mainly time intensive	
☒	Low %	Overall Buyer Costs	High %
		FM costs are substantial	
☐	High Profits	Buyer Profitability	Operating Losses
☒	High Impact	Buyer Product/Service	Low Impact
		less in markets where added value is more clear (cf. cleaning in a hospital)	

THREATS
1. further decrease of differentiation, moving more to commoditisation
2.

OPPORTUNITIES
1. buyer cost optimization
2. focus on markets where service has greater value

[*] Powerful buyers (the first five) and/or price sensitive buyers (the last three) force down prices, demand better quality/service, & play competitors off one another.
[†] DF – Driving factors of industry dynamics to be indicated with check marks.

Appendix C Template bargaining power of suppliers

Threat of Suppliers/Supplier Groups* ( )

Low	THREAT LEVELS	High
DF†		
☒ Many Organizations	Supplier Concentration	Few Organizations
☒ High %	Supplier Volume/Profit	Low %
☐ Not Feasible	Supplier Forward Integration	Credible Threat
☒ Standardized	Supplier Products	Highly Differentiated
☐ Low	Industry Switching Costs	High
☐ Many Viable Options	Supplier Substitutes	No Viable Options

Supplier Volume/Profit: high volumes and long-term contracts

Supplier Forward Integration: it is for single-services, not for multi-services.

Industry Switching Costs: Apart for IT suppliers there are little to no switching costs

THREATS

1. pressure on single service market by supplier forward integration
2.

OPPORTUNITIES

1. subcontracting provides protection and additional revenue
2. high volume of standardised products gives a strong negotiation position

* Powerful suppliers charge higher prices, limit product/service feathers/quality, and/or shift costs to other industry players.
† DF – Driving factors of industry dynamics to be indicated with check marks.

Appendix D Template threat of substitutes

Threat of Substitutes * ( )

Low	**T H R E A T L E V E L S**	**High**

DF†

☐ *More Expensive* — Price/Indirect Costs, — *Less Expensive*

only substitute for outsourcing is in-sourcing, this is time intensive and costly

☒ *Low* — Buyer Price Sensitivity — *High*

most buyers are price sensitive

☐ *Lower* — Performance — *Higher*

for single service substitutes, circumstance dependent

☐ *High* — Buyer Switching Costs — *Low*

mainly time intensive

☐ *Risk Avoidance* — Buyer Profile — *Risk Seeking*

depends from buyer to buyer.

☒ *↑Cost, ↓Performance* — Substitute Industry Price/Performance Trends — *↓Cost, ↑Performance*

T H R E A T S
1. buyer price-sensitivity will make a decent substitute a threat.
2.
O P P O R T U N I T I E S
1. There is a lock-in effect, it takes so much effort to insource
2. every service after outsourcing, that barely anyone will do it

* Substitutes perform the same/similar function as products of the industry but by different means. Viable substitutes place a ceiling on prices and drive up costs related to product performance, marketing, service, and R&D.

† DF – Driving factors of industry dynamics to be indicated with check marks.

Appendix E Template threat of new entry

_Threat of New Entrants_*

Low	THREAT LEVELS	High

DF†

☒ High — Supply-Side Economies of Scale — Low

volume discounts and regional coverage

☒ High Network Effects — Demand-Side Benefits of Scale — Low Network Effects

broad awareness and access to big tender through references.

☐ High — Switching Costs — Low

only in time

☐ High — Capital Requirements — Low

mediocre, mostly investments in personel, a little in infra

☒ First Mover Benefits — Incumbency — Late Mover Benefits

mild first mover benefits through EOS

☐ Limited Access — Distribution Channels — Easy Access

☐ Regulations — Government Policy — Subsidies

☐ Retaliatory — Anticipated Incumbent Response — Welcoming

THREATS
1. Single service providers acquiring other companies or expanding portfolio
2.
OPPORTUNITIES
1. maximizing EOS provides procurement possibilities
2. minimize the chance on new entrants by securing new tenders

* The threat of new entry puts downward pressure on prices, and upward pressure on costs/rate of investment necessary to keep new entrants out of the industry.
† DF – Driving factors of industry dynamics to be indicated with check marks.

Appendix F Tender analysis

tender size	number of tenders	% of total tenders	cumulated turnover
0 - 100.000	308	60,63%	9.357.988,68 €
100.000 - 250.000	91	17,91%	14.670.141,76 €
250.000 - 500.000	57	11,22%	19.374.586,52 €
500.000 - 1.000.000	29	5,71%	22.058.043,97 €
1.000.000 - 2.500.000	19	3,74%	27.276.631,98 €
2.500.000 - 5.000.000	3	0,59%	8.857.127,90 €
5.000.000 - 10.000.000	1	0,20%	6.420.171,63 €
total	508	100,00%	108.014.692,44 €

tender overview from Q3 2020 to Q2 2021

tender size	number of tenders	% of total tenders	cumulated turnover
250.000 - 500.000	1	12,50%	460.000,00 €
500.000 - 1.000.000	3	37,50%	2.368.162,76 €
1.000.000 - 2.500.000	4	50,00%	5.880.863,88 €
total	8	100,00%	8.709.026,64 €

overview of all multi-service tenders from Q3 2020 to Q2 2021

Appendix H Template competitive rivalry

Threat of Competitive Rivalry*

Low	THREAT LEVELS	High

DF†

Few/Leader — Existing Competitors — Numerous/Balanced
There are not a lot of multi-service providers

High — Industry Growth — Slow/Negative
Growth is in line with GDP

Low — Fixed and/or Storage Costs — High

High — Product Differentiation — Low
Apart from catering, differentiation possibilities are limited

High — Switching Costs — Low
Only procedural (time)

Low — Strategic Stakes — High
The most revenue per contract in this part of the FM market

Small Increments — Capacity Expansion — Large Increments

Low — Exit Barriers — High

THREATS
1. a competitor is more successful at differentiating
2.
OPPORTUNITIES
1. only a few competitors for the most lucrative FM contracts
2.

* Rivalry necessitates price cuts, new product development, advertising campaigns, service improvements depending on the intensity and basis of competition between rival organizations.
† DF – Driving factors of industry dynamics to be indicated with check marks.

Appendix I Competitor analysis

Name	Revenue 2019	Evaluation
Sodexo Belgium	378.700.325,00 €	withhold
Securitas	312.635.210,00 €	single service provider
ISS Facility Services	304.300.204,00 €	withhold
G4S Secure Solutions	173.827.200,00 €	single service provider
Compass Group Belgilux	161.802.148,00 €	single service provider
Gom	123.657.061,00 €	withhold
Cleaning Masters	108.074.185,00 €	withhold
Iris Facility Solutions	102.367.273,00 €	no catering & security
Laurenty	101.007.300,00 €	single service provider
Plus Home Services	96.922.489,00 €	single service provider
Atalian	85.659.113,00 €	withhold

Company & subsidiary	Turnover
FSGBE	211.507.796,00 €
GOM	123.657.061,00 €
FS	37.885.443,00 €
HEC	226.483,00 €
trigion	20.649.063,00 €
prorest	19.090.411,00 €
wheels	2.014.988,00 €
axxicom	2.196.915,00 €
OBM	5.787.432,00 €
Atalian	90.457.145,00 €
Atalian	85.659.113,00 €
temco (RE)	343.002,00 €
mngt services	4.455.030,00 €
Multimasters	177.265.595,00 €
cleaning masters	108.074.185,00 €
security masters	9.014.741,00 €
construct masters	3.297.257,00 €
mobility masters	28.049.320,00 €
techni masters	3.753.915,00 €
green masters	971.659,00 €
recrewtment	24.104.518,00 €
ISS	375.410.162,00 €
facility services	304.300.204,00 €
reception & support	3.623.579,00 €
catering	67.486.379,00 €
sodexo	382.481.703,00 €
sodexo FAM	378.700.325,00 €

security	3.781.378,00 €

Appendix J LinkedIn campaign results

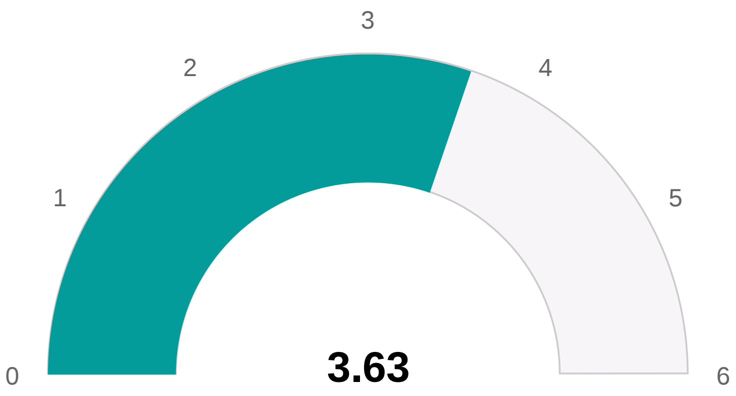
MARKTONDERZOEK FACILITAIRE MARKT ENGELS

- First Response 13 Jun 2021 09:22 pm
- Last Response 26 Jun 2021 09:53 pm

Number of responses	Average Duration	Completion rate
8	05 min 48 sec	5%

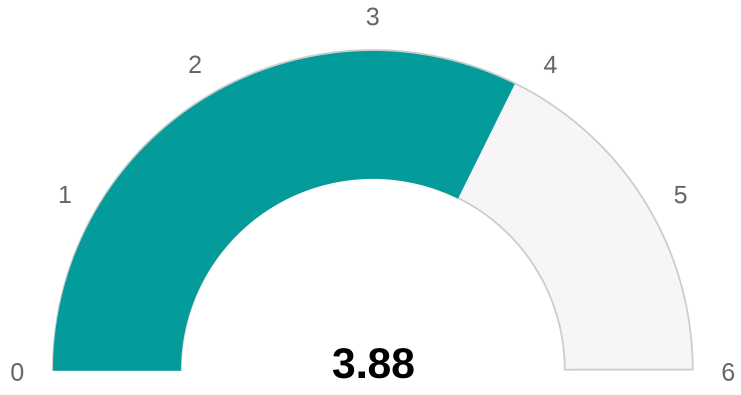
1. Please indicate to what extent you agree with the following statements, from 1 star (do not agree at all) to 6 stars (totally agree). You can explain your choice under each question.

2. Price is the most decisive criterium in a facility tender.



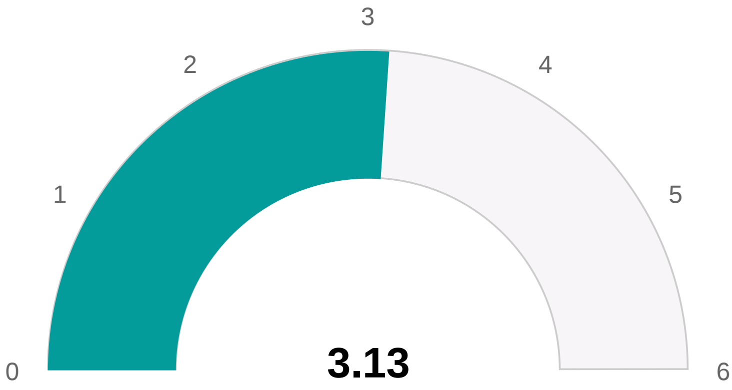
Response Date	Respondent Name	Respondent E-mail	Response
13 Jun 2021 09:22 pm			4
14 Jun 2021 10:15 am			2
21 Jun 2021 08:46 pm			6 **Additional text:** If the tender has good specifications. It's the most decisive criterium.
22 Jun 2021 09:58 am			3
23 Jun 2021 12:27 pm			5
23 Jun 2021 04:23 pm			4 **Additional text:** Quality and service are important as well
25 Jun 2021 10:02 am			3
26 Jun 2021 09:53 pm			2

3. There is a big difference between the products and services of different facility service providers in the Belgian market.



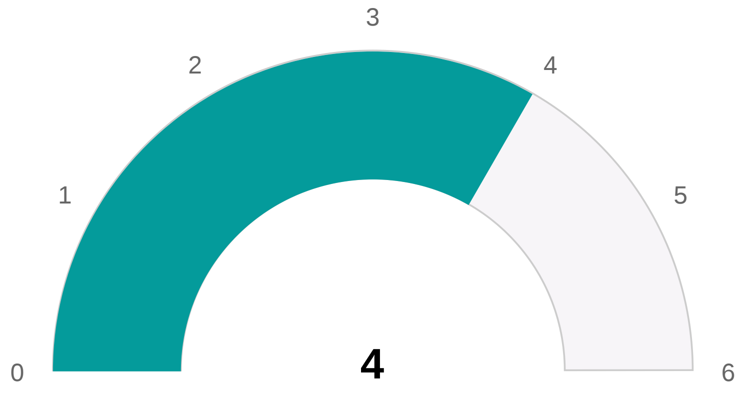
Response Date	Respondent Name	Respondent E-mail	Response
13 Jun 2021 09:22 pm			4
14 Jun 2021 10:15 am			4
21 Jun 2021 08:46 pm			4 **Additional text:** The main one is to get local people to do the job.
22 Jun 2021 09:58 am			5
23 Jun 2021 12:27 pm			3
23 Jun 2021 04:23 pm			3 **Additional text:** Don't know
25 Jun 2021 10:02 am			3
26 Jun 2021 09:53 pm			5

4. A facility service provider can easily raise prices without having a negative impact on their sales volumes.



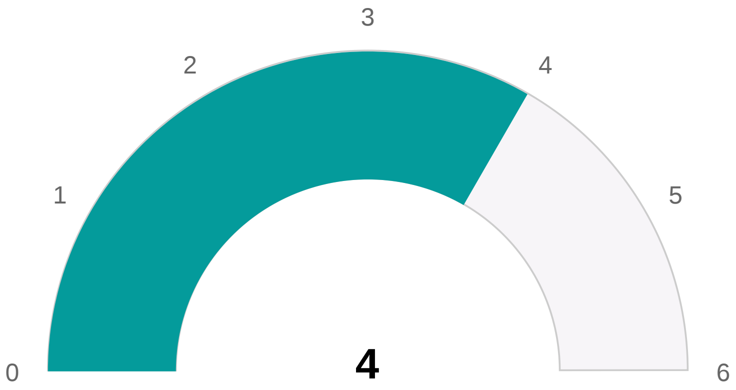
Response Date	Respondent Name	Respondent E-mail	Response
13 Jun 2021 09:22 pm			5
14 Jun 2021 10:15 am			1
21 Jun 2021 08:46 pm			4 **Additional text:** If the service is valuable, customer will tend to continue even if the price is raised.
22 Jun 2021 09:58 am			3
23 Jun 2021 12:27 pm			3
23 Jun 2021 04:23 pm			1
25 Jun 2021 10:02 am			5
26 Jun 2021 09:53 pm			3

5. It takes a company a lot of effort and/or costs to change from one facility service provider to another.



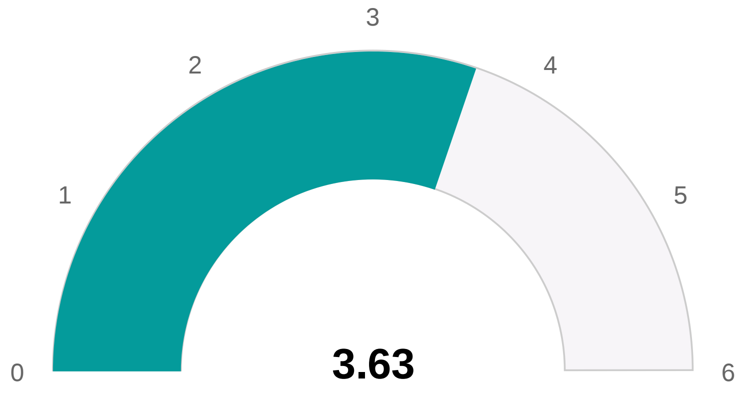
Response Date	Respondent Name	Respondent E-mail	Response
13 Jun 2021 09:22 pm			5
14 Jun 2021 10:15 am			4
21 Jun 2021 08:46 pm			4 **Additional text:** All is about your specifications. When we define a tender we always start by thinking how to switch to another provider.
22 Jun 2021 09:58 am			5
23 Jun 2021 12:27 pm			3
23 Jun 2021 04:23 pm			4
25 Jun 2021 10:02 am			5
26 Jun 2021 09:53 pm			2

6. Economies of scale play an important role for facility service providers.



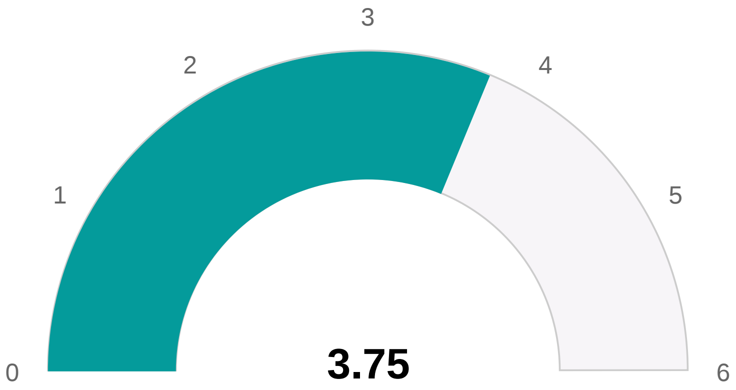
Response Date	Respondent Name	Respondent E-mail	Response
13 Jun 2021 09:22 pm			4
14 Jun 2021 10:15 am			4
21 Jun 2021 08:46 pm			4 **Additional text:** Except if the final customer is facing lower quality...
22 Jun 2021 09:58 am			4
23 Jun 2021 12:27 pm			4
23 Jun 2021 04:23 pm			4
25 Jun 2021 10:02 am			3
26 Jun 2021 09:53 pm			5

7. Economies of scale can only be achieved by the biggest players in the market.



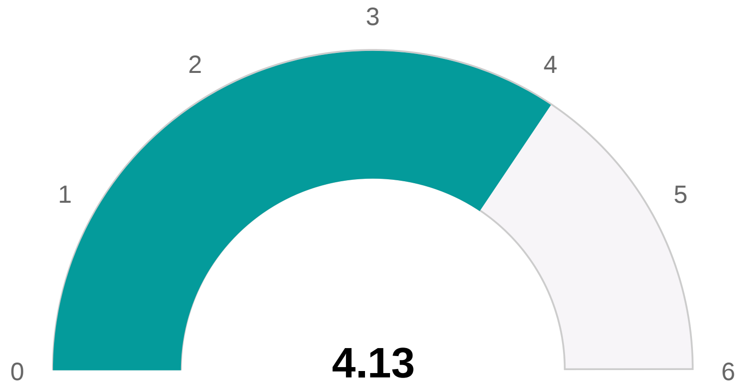
Response Date	Respondent Name	Respondent E-mail	Response
13 Jun 2021 09:22 pm			5
14 Jun 2021 10:15 am			5
21 Jun 2021 08:46 pm			6 **Additional text:** Unfortunately.
22 Jun 2021 09:58 am			2
23 Jun 2021 12:27 pm			3
23 Jun 2021 04:23 pm			2
25 Jun 2021 10:02 am			4
26 Jun 2021 09:53 pm			2

8. The Belgian facility market is dominated by a few big players.



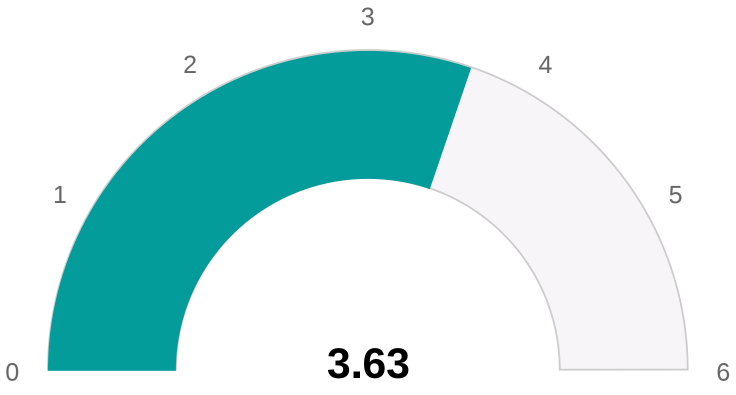
Response Date	Respondent Name	Respondent E-mail	Response
13 Jun 2021 09:22 pm			4
14 Jun 2021 10:15 am			3
21 Jun 2021 08:46 pm			4 **Additional text:** It depends of the area. In Liège, it's not true.
22 Jun 2021 09:58 am			2
23 Jun 2021 12:27 pm			4
23 Jun 2021 04:23 pm			3 **Additional text:** Don't know
25 Jun 2021 10:02 am			6
26 Jun 2021 09:53 pm			4

9. There is a high level of customer loyalty; Generally speaking, companies don't often switch from one facility service provider to another.



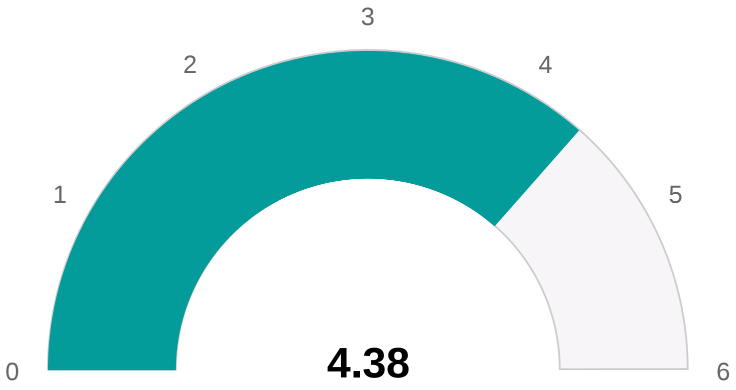
Response Date	Respondent Name	Respondent E-mail	Response
13 Jun 2021 09:22 pm			5
14 Jun 2021 10:15 am			5
21 Jun 2021 08:46 pm			6 **Additional text:** All is about people. The human factor...
22 Jun 2021 09:58 am			5
23 Jun 2021 12:27 pm			2
23 Jun 2021 04:23 pm			3 **Additional text:** Don't know
25 Jun 2021 10:02 am			4
26 Jun 2021 09:53 pm			3

10. There is not a big difference in service or product quality between the different facility service providers in the Belgian market.



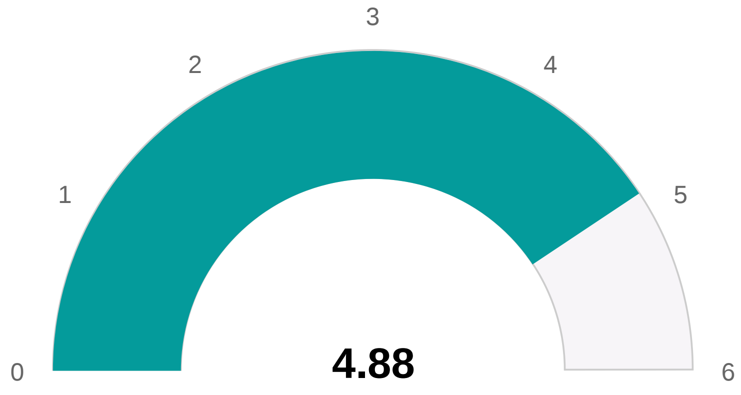
Response Date	Respondent Name	Respondent E-mail	Response
13 Jun 2021 09:22 pm			4
14 Jun 2021 10:15 am			2
21 Jun 2021 08:46 pm			4 **Additional text:** The main one is to get local people to do the job.
22 Jun 2021 09:58 am			4
23 Jun 2021 12:27 pm			4
23 Jun 2021 04:23 pm			3 **Additional text:** Don't know
25 Jun 2021 10:02 am			4
26 Jun 2021 09:53 pm			4

11. A new facility service provider has to make big investments (personel, real estate, assets, knowlegde base,...) before they can enter the market.



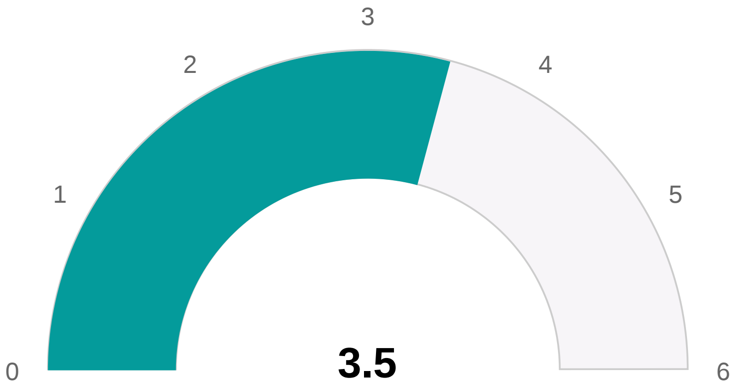
Response Date	Respondent Name	Respondent E-mail	Response
13 Jun 2021 09:22 pm			4
14 Jun 2021 10:15 am			3
21 Jun 2021 08:46 pm			5
22 Jun 2021 09:58 am			4 **Additional text:** Outsourcing is key.
23 Jun 2021 12:27 pm			4
23 Jun 2021 04:23 pm			5
25 Jun 2021 10:02 am			5
26 Jun 2021 09:53 pm			5

12. The quality of products and services provided by facility service providers are heavily dependent on their suppliers and third-party partnerships.



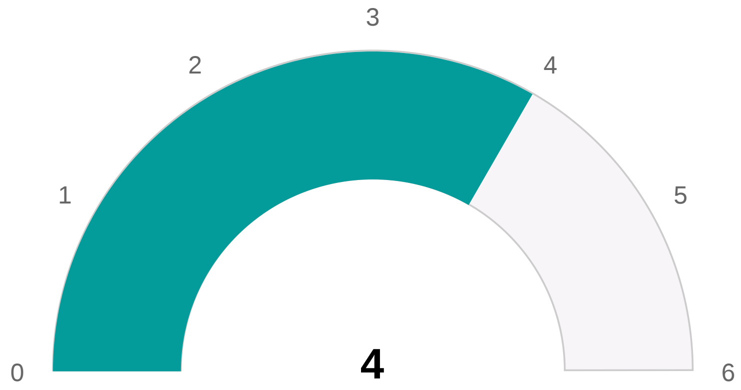
Response Date	Respondent Name	Respondent E-mail	Response
13 Jun 2021 09:22 pm			5
14 Jun 2021 10:15 am			5
21 Jun 2021 08:46 pm			5
22 Jun 2021 09:58 am			5
23 Jun 2021 12:27 pm			4
23 Jun 2021 04:23 pm			6
25 Jun 2021 10:02 am			5
26 Jun 2021 09:53 pm			4

13. A facility service provider has a lot of different suppliers and partners to choose from within the Belgian market.



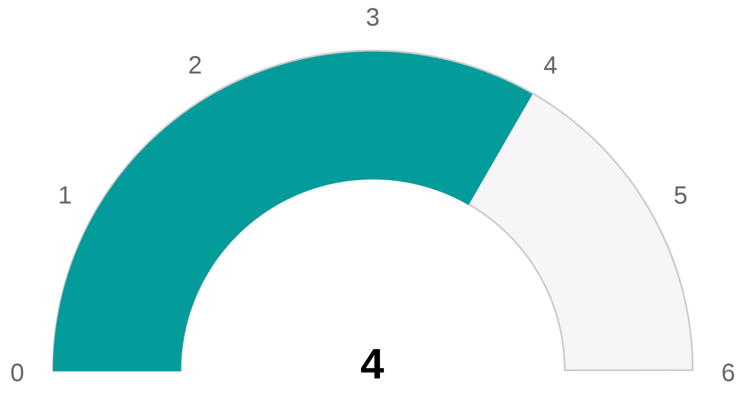
Response Date	Respondent Name	Respondent E-mail	Response
13 Jun 2021 09:22 pm			3
14 Jun 2021 10:15 am			4
21 Jun 2021 08:46 pm			4
22 Jun 2021 09:58 am			3
23 Jun 2021 12:27 pm			4
23 Jun 2021 04:23 pm			3 **Additional text:** Don't know
25 Jun 2021 10:02 am			3
26 Jun 2021 09:53 pm			4

14. For most facility needs or problems outsourcing is not the only option.



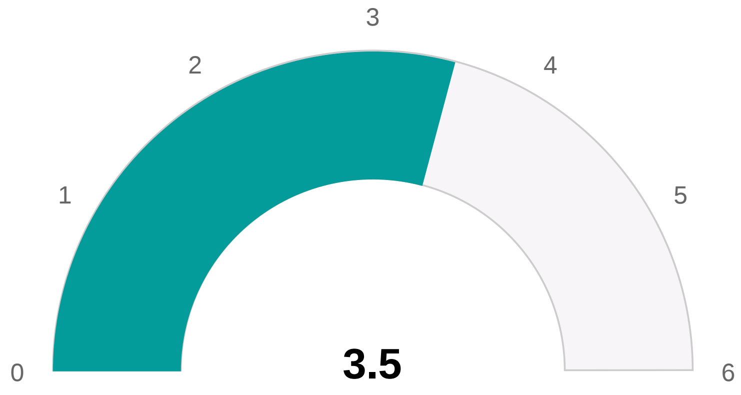
Response Date	Respondent Name	Respondent E-mail	Response
13 Jun 2021 09:22 pm			4
14 Jun 2021 10:15 am			4
21 Jun 2021 08:46 pm			4
22 Jun 2021 09:58 am			2
23 Jun 2021 12:27 pm			4
23 Jun 2021 04:23 pm			6
25 Jun 2021 10:02 am			3
26 Jun 2021 09:53 pm			5

15. Outsourcing facility services is the most preferred option by most companies.



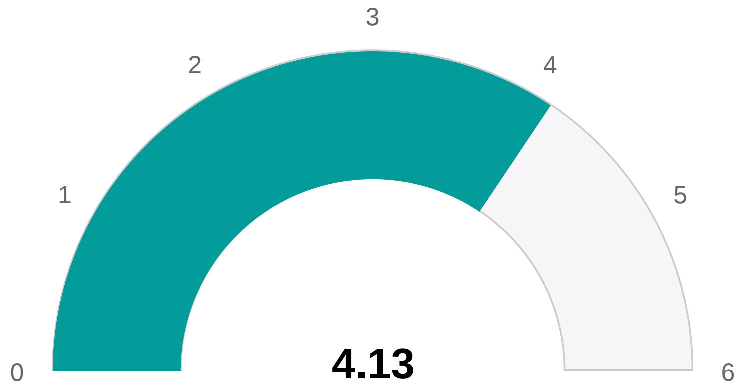
Response Date	Respondent Name	Respondent E-mail	Response
13 Jun 2021 09:22 pm			3
14 Jun 2021 10:15 am			4
21 Jun 2021 08:46 pm			6
22 Jun 2021 09:58 am			4
23 Jun 2021 12:27 pm			4
23 Jun 2021 04:23 pm			3 **Additional text:** Don't know
25 Jun 2021 10:02 am			5
26 Jun 2021 09:53 pm			3

16. A facility service provider can easily, without too much effort or cost, switch between suppliers.



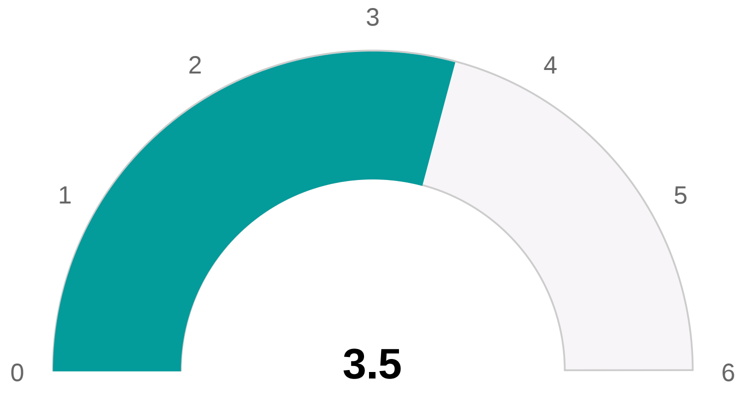
Response Date	Respondent Name	Respondent E-mail	Response
13 Jun 2021 09:22 pm			3
14 Jun 2021 10:15 am			4
21 Jun 2021 08:46 pm			4
22 Jun 2021 09:58 am			3
23 Jun 2021 12:27 pm			4
23 Jun 2021 04:23 pm			3 **Additional text:** Don't know
25 Jun 2021 10:02 am			3
26 Jun 2021 09:53 pm			4

17. Relationally speaking, growth in the facilities market is very dependent on other industries.



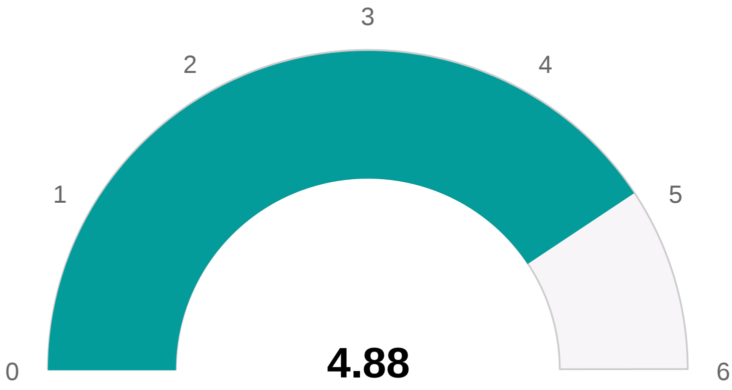
Response Date	Respondent Name	Respondent E-mail	Response
13 Jun 2021 09:22 pm			3
14 Jun 2021 10:15 am			4
21 Jun 2021 08:46 pm			6
22 Jun 2021 09:58 am			3
23 Jun 2021 12:27 pm			4
23 Jun 2021 04:23 pm			5
25 Jun 2021 10:02 am			4
26 Jun 2021 09:53 pm			4

18. Customers of facility service providers have seen a decrease in buying power.



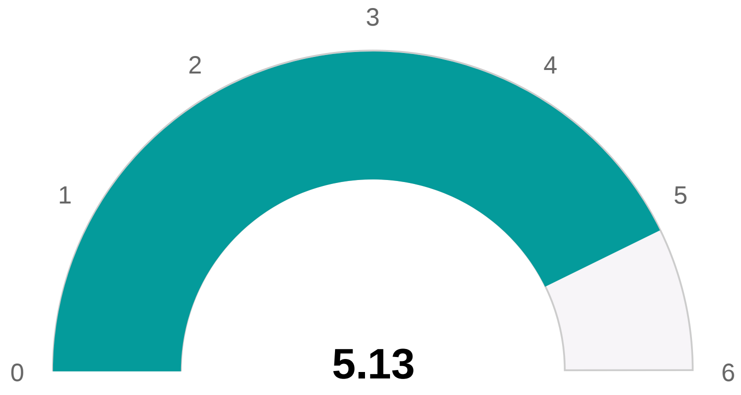
Response Date	Respondent Name	Respondent E-mail	Response
13 Jun 2021 09:22 pm			3
14 Jun 2021 10:15 am			4
21 Jun 2021 08:46 pm			4
22 Jun 2021 09:58 am			4
23 Jun 2021 12:27 pm			4
23 Jun 2021 04:23 pm			3 **Additional text:** Don't know
25 Jun 2021 10:02 am			4
26 Jun 2021 09:53 pm			2

19. Societal trends have an indirect effect on the facility service providers, due to the effect they have on the needs and desires of the employees of their customers.



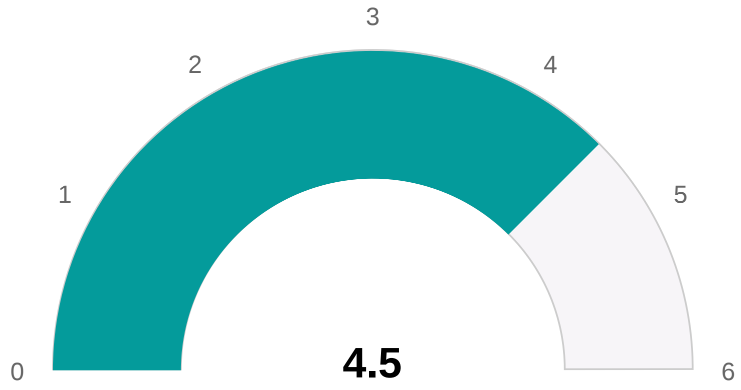
Response Date	Respondent Name	Respondent E-mail	Response
13 Jun 2021 09:22 pm			5
14 Jun 2021 10:15 am			4
21 Jun 2021 08:46 pm			6
22 Jun 2021 09:58 am			4
23 Jun 2021 12:27 pm			4
23 Jun 2021 04:23 pm			6
25 Jun 2021 10:02 am			5
26 Jun 2021 09:53 pm			5

20. Technological developments will have a strong effect on the Belgian market for facility services.



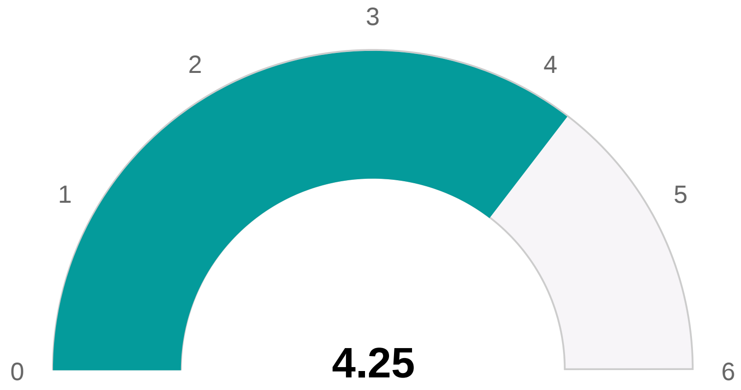
Response Date	Respondent Name	Respondent E-mail	Response
13 Jun 2021 09:22 pm			5
14 Jun 2021 10:15 am			4
21 Jun 2021 08:46 pm			6
22 Jun 2021 09:58 am			5
23 Jun 2021 12:27 pm			4
23 Jun 2021 04:23 pm			6
25 Jun 2021 10:02 am			5
26 Jun 2021 09:53 pm			6

21. The development of smart buildings will have a strong impact on the Belgian market for facility services.



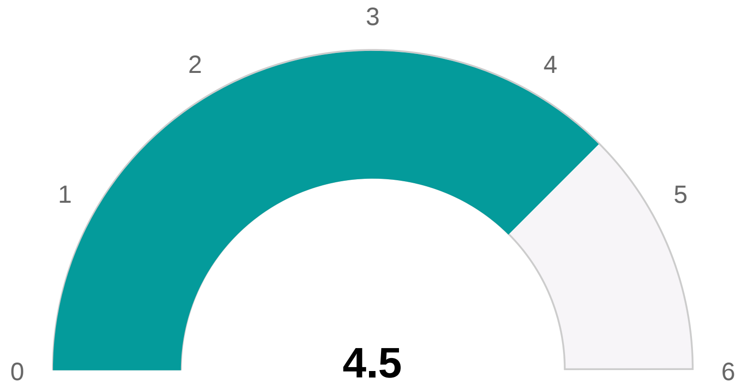
Response Date	Respondent Name	Respondent E-mail	Response
13 Jun 2021 09:22 pm			4
14 Jun 2021 10:15 am			4
21 Jun 2021 08:46 pm			6
22 Jun 2021 09:58 am			3
23 Jun 2021 12:27 pm			4
23 Jun 2021 04:23 pm			5
25 Jun 2021 10:02 am			5
26 Jun 2021 09:53 pm			5

22. Currently, there are still reservations that keep companies from investing in technological developments that will have an impact on facility services.



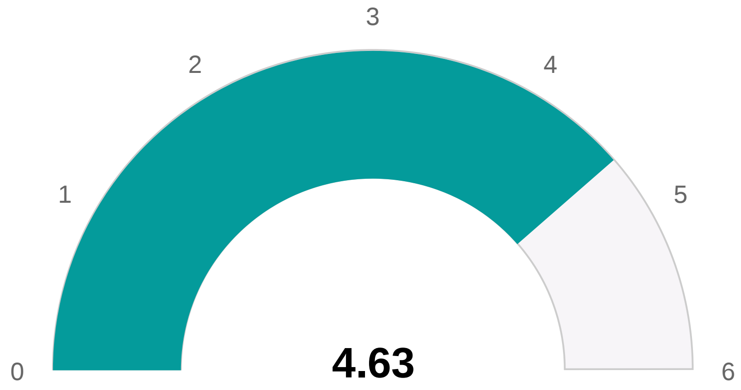
Response Date	Respondent Name	Respondent E-mail	Response
13 Jun 2021 09:22 pm			4
14 Jun 2021 10:15 am			4
21 Jun 2021 08:46 pm			6 **Additional text:** Because of the human factor. People prefers humans to robots...
22 Jun 2021 09:58 am			4
23 Jun 2021 12:27 pm			4
23 Jun 2021 04:23 pm			4
25 Jun 2021 10:02 am			4
26 Jun 2021 09:53 pm			4

23. Facilities suppliers that conduct business in an environmentally-friendly manner is highly valued by customers in the facilities market.



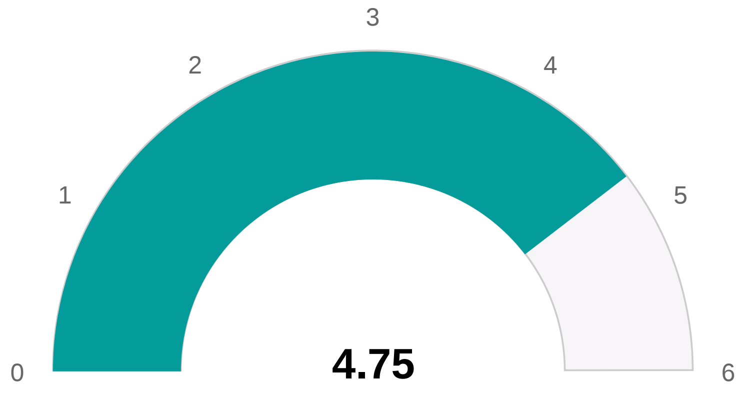
Response Date	Respondent Name	Respondent E-mail	Response
13 Jun 2021 09:22 pm			5
14 Jun 2021 10:15 am			4
21 Jun 2021 08:46 pm			4 **Additional text:** Greenwashing ...
22 Jun 2021 09:58 am			6
23 Jun 2021 12:27 pm			4
23 Jun 2021 04:23 pm			2
25 Jun 2021 10:02 am			5
26 Jun 2021 09:53 pm			6

24. Current and future environmental policy and legislation (national & international) have a big impact on the Belgian market for facility services.



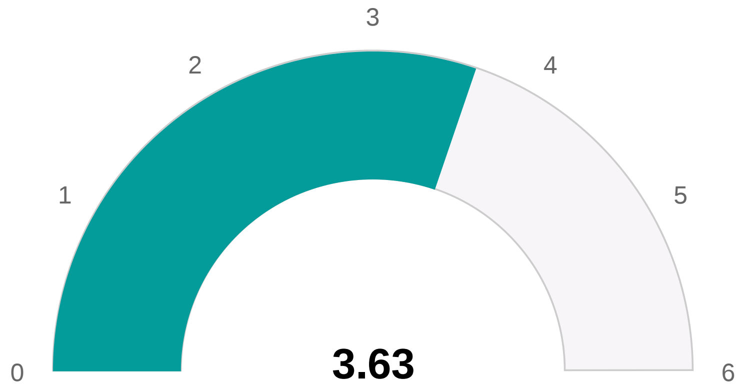
Response Date	Respondent Name	Respondent E-mail	Response
13 Jun 2021 09:22 pm			5
14 Jun 2021 10:15 am			2
21 Jun 2021 08:46 pm			4
22 Jun 2021 09:58 am			5
23 Jun 2021 12:27 pm			4
23 Jun 2021 04:23 pm			6
25 Jun 2021 10:02 am			5
26 Jun 2021 09:53 pm			6

25. Acquiring permits and certificates requires a great investment (time and/or budget).



Response Date	Respondent Name	Respondent E-mail	Response
13 Jun 2021 09:22 pm			5
14 Jun 2021 10:15 am			4
21 Jun 2021 08:46 pm			5
22 Jun 2021 09:58 am			5
23 Jun 2021 12:27 pm			4
23 Jun 2021 04:23 pm			5
25 Jun 2021 10:02 am			6
26 Jun 2021 09:53 pm			4

26. It is likely that changes in labor laws will have a big impact on Belgian market for facility services.



Response Date	Respondent Name	Respondent E-mail	Response
13 Jun 2021 09:22 pm			3
14 Jun 2021 10:15 am			3
21 Jun 2021 08:46 pm			6
22 Jun 2021 09:58 am			2
23 Jun 2021 12:27 pm			4
23 Jun 2021 04:23 pm			4
25 Jun 2021 10:02 am			3
26 Jun 2021 09:53 pm			4

27. Want to win No Rules Rules by Reed Hastings & Erin Meyer? Fill in this form. Market Research Institute and partners will send the report of this survey to this e-mail address. Disclaimer: Please fill in your job title for context.

First and surname

Answered	100% (8)	

Job title

Answered	100% (8)	

Company

Answered	100% (8)	

Email adress

Answered	100% (8)	

Response Date	Respondent Name	Respondent E-mail	Response
13 Jun 2021 09:22 pm			First and surname -> Anouschka Jansen Job title -> None Company -> None Email adress -> anous.jansen@hotmail.com
14 Jun 2021 10:15 am			First and surname -> Wim Job title -> Director Technical Serviced Company -> SCHAEFFLER Email adress -> wim.dierckx@schaeffler.com
21 Jun 2021 08:46 pm			First and surname -> Olivier Greoli Job title -> Technical Manager Company -> RTC Télé Liège Email adress -> olivier@greoli.be
22 Jun 2021 09:58 am			First and surname -> Benjamin Masset Job title -> Project Manager Company -> Liege Airport Email adress -> bma@liegeairport.com
23 Jun 2021 12:27 pm			First and surname -> Veronique Verberght Job title -> Facility Manager Company -> Facilicom Email adress -> veronique.verberght@facilicomfs.be
23 Jun 2021 04:23 pm			First and surname -> Stefan Pitz Job title -> Pianist, Teacher and Entrepreneur Company -> Musikakademie der DG//Eastbelgica Email adress -> spitz@scarlet.be
25 Jun 2021 10:02 am			First and surname -> Séverine Baert Job title -> Projectmanager Company -> MSK Gent Email adress -> severine.baert@stad.gent

Response Date	Respondent Name	Respondent E-mail	Response
26 Jun 2021 09:53 pm			First and surname -> Eric Verhelst Job title -> Retired Plant Manager Company -> TE CONNECTIVITY Email adress -> eric.verhelst@hotmail.com

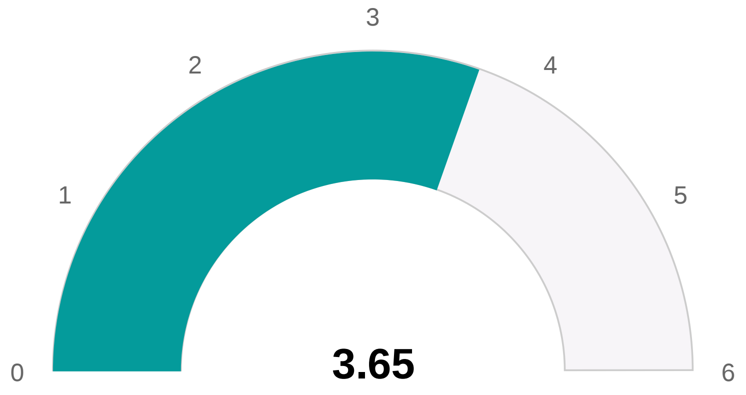
MARKTONDERZOEK FACILITAIRE MARKT - NEDERLANDS

- First Response 21 Jun 2021 02:20 pm
- Last Response 12 Jul 2021 07:06 pm

Number of responses	Average Duration	Completion rate
20	06 min 18 sec	16%

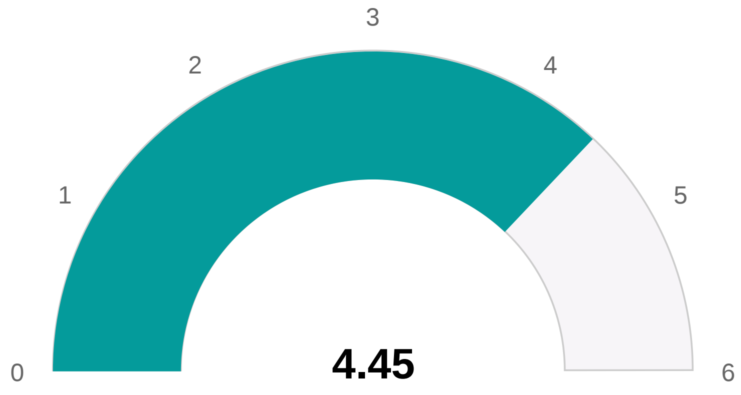
1. Duid telkens aan in hoeverre je akkoord bent met onderstaande stellingen, van 1 ster (helemaal niet mee eens) tot 6 sterren (helemaal mee eens). Onder elke vraag kan je volledig vrijblijvend je keuze extra toelichten.

2. Prijs is het meest doorslaggevende criterium in een facilitaire aanbesteding.



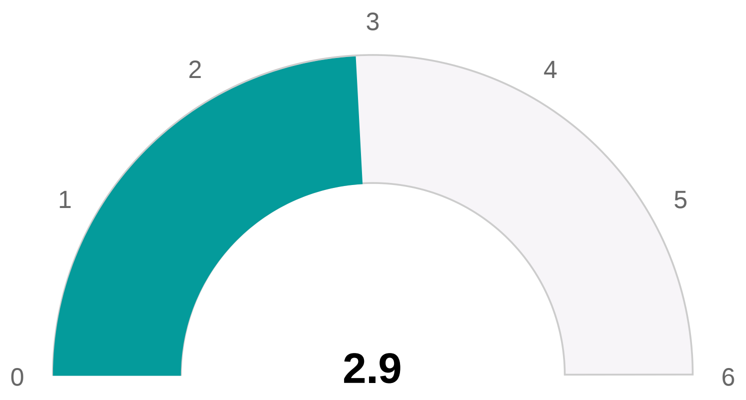
Response Date	Response
21 Jun 2021 02:20 pm	4
21 Jun 2021 03:14 pm	3
21 Jun 2021 03:49 pm	2
22 Jun 2021 09:42 am	3
24 Jun 2021 09:39 am	4
24 Jun 2021 10:20 am	3
25 Jun 2021 05:38 pm	4
28 Jun 2021 01:29 pm	4
30 Jun 2021 08:05 am	3 **Additional text:** belangrijk, maar de kwaliteit mag niet uit het oog verloren worden
01 Jul 2021 11:16 am	4
02 Jul 2021 08:03 pm	3
03 Jul 2021 01:41 am	6
05 Jul 2021 10:55 pm	5
07 Jul 2021 12:35 pm	5
07 Jul 2021 12:52 pm	3
07 Jul 2021 01:53 pm	3
09 Jul 2021 10:19 am	4 **Additional text:** Vaak komt facility in het vaarwater van procurement en hebben ze een eigen visie op budgetten.
12 Jul 2021 07:45 am	3
12 Jul 2021 11:26 am	4
12 Jul 2021 07:06 pm	3

3. Er is veel verschil tussen producten en diensten van verschillende facilitaire dienstverleners.



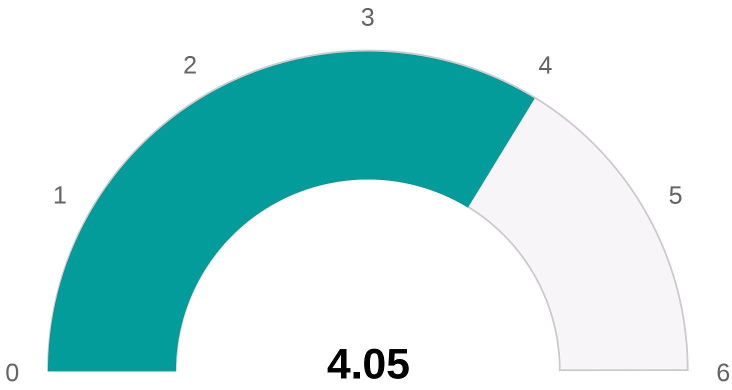
Response Date	Response
21 Jun 2021 02:20 pm	6
21 Jun 2021 03:14 pm	4
21 Jun 2021 03:49 pm	5
22 Jun 2021 09:42 am	5
24 Jun 2021 09:39 am	4
24 Jun 2021 10:20 am	4
25 Jun 2021 05:38 pm	6
28 Jun 2021 01:29 pm	5
30 Jun 2021 08:05 am	4
01 Jul 2021 11:16 am	3
02 Jul 2021 08:03 pm	5
03 Jul 2021 01:41 am	6
05 Jul 2021 10:55 pm	4
07 Jul 2021 12:35 pm	2
07 Jul 2021 12:52 pm	6
07 Jul 2021 01:53 pm	4
09 Jul 2021 10:19 am	3 **Additional text:** Neen , niet echt. Het verschil maak je door naar je klant te luisteren en daar op inspelen.
12 Jul 2021 07:45 am	5
12 Jul 2021 11:26 am	4
12 Jul 2021 07:06 pm	4

4. Een facilitaire dienstverlener kan zijn prijs gemakkelijk verhogen zonder dat dit nadelige gevolgen heeft voor zijn verkoop.



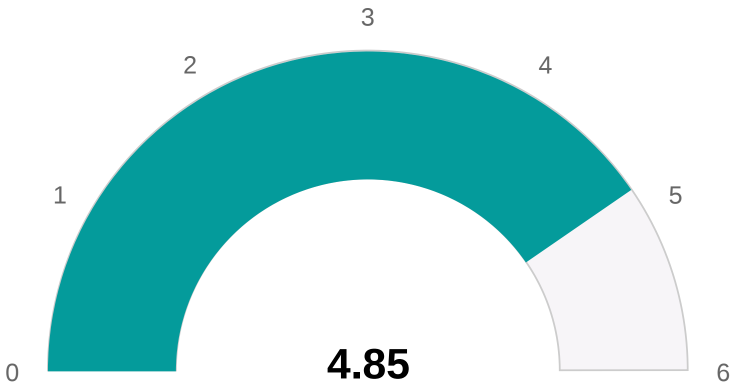
Response Date	Response
21 Jun 2021 02:20 pm	6
21 Jun 2021 03:14 pm	2
21 Jun 2021 03:49 pm	2
22 Jun 2021 09:42 am	3
24 Jun 2021 09:39 am	4
24 Jun 2021 10:20 am	2
25 Jun 2021 05:38 pm	3
28 Jun 2021 01:29 pm	2
30 Jun 2021 08:05 am	2
01 Jul 2021 11:16 am	1
02 Jul 2021 08:03 pm	5
03 Jul 2021 01:41 am	5
05 Jul 2021 10:55 pm	3
07 Jul 2021 12:35 pm	2
07 Jul 2021 12:52 pm	2
07 Jul 2021 01:53 pm	3
09 Jul 2021 10:19 am	3 **Additional text:** Ook neen. Goede afspraken maken bij de opmaak van het anual plan. (budgetten) Voorkomen ipv genezen.
12 Jul 2021 07:45 am	2
12 Jul 2021 11:26 am	2
12 Jul 2021 07:06 pm	4

5. Een wissel van facilitaire partner brengt voor een klant veel kosten of moeite met zich mee.



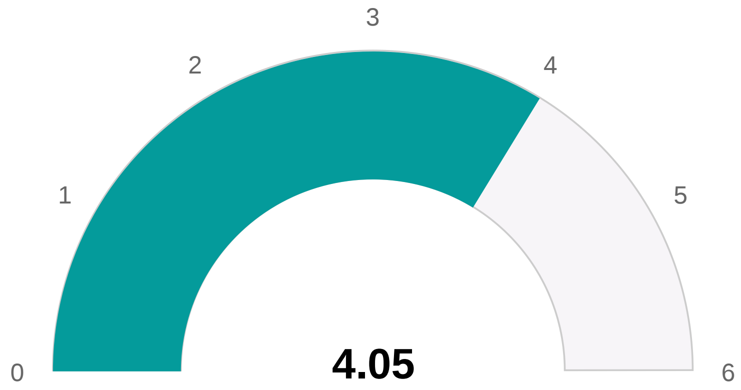
Response Date	Response
21 Jun 2021 02:20 pm	2
21 Jun 2021 03:14 pm	4
21 Jun 2021 03:49 pm	6
22 Jun 2021 09:42 am	5
24 Jun 2021 09:39 am	4
24 Jun 2021 10:20 am	5
25 Jun 2021 05:38 pm	5
28 Jun 2021 01:29 pm	5
30 Jun 2021 08:05 am	5 **Additional text:** kosten misschien niet, maar wel moeite om de nieuwe partner te laten opstarten
01 Jul 2021 11:16 am	3
02 Jul 2021 08:03 pm	4
03 Jul 2021 01:41 am	3
05 Jul 2021 10:55 pm	1
07 Jul 2021 12:35 pm	4
07 Jul 2021 12:52 pm	5
07 Jul 2021 01:53 pm	3
09 Jul 2021 10:19 am	5 **Additional text:** Ik denk van wel. Het vraagt mi een doorlooptijd van 1 jaar , als alles meezit.
12 Jul 2021 07:45 am	5
12 Jul 2021 11:26 am	5
12 Jul 2021 07:06 pm	2

6. Schaalvoordelen spelen sterk in de facilitaire markt.



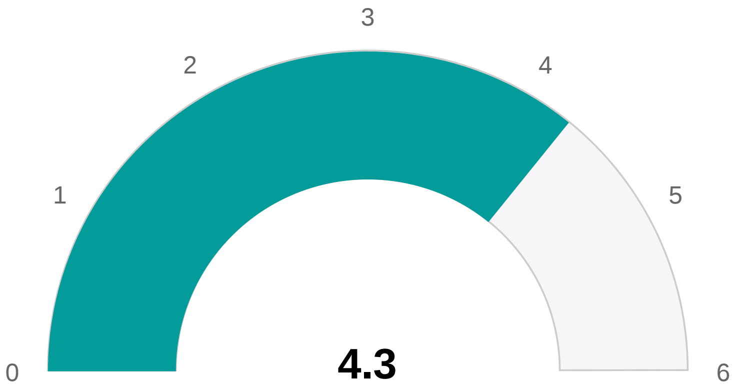
Response Date	Response
21 Jun 2021 02:20 pm	5
21 Jun 2021 03:14 pm	5
21 Jun 2021 03:49 pm	4
22 Jun 2021 09:42 am	5
24 Jun 2021 09:39 am	4
24 Jun 2021 10:20 am	5
25 Jun 2021 05:38 pm	6
28 Jun 2021 01:29 pm	6
30 Jun 2021 08:05 am	5
01 Jul 2021 11:16 am	3
02 Jul 2021 08:03 pm	6
03 Jul 2021 01:41 am	6
05 Jul 2021 10:55 pm	5
07 Jul 2021 12:35 pm	4
07 Jul 2021 12:52 pm	6
07 Jul 2021 01:53 pm	4
09 Jul 2021 10:19 am	3 **Additional text:** Dit is een klein onderdeel van het gehele pakket en mag niet doorslaggevend zijn.
12 Jul 2021 07:45 am	6
12 Jul 2021 11:26 am	4
12 Jul 2021 07:06 pm	5

7. Schaalvoordelen worden enkel bekomen door de grotere spelers in de facilitaire markt.



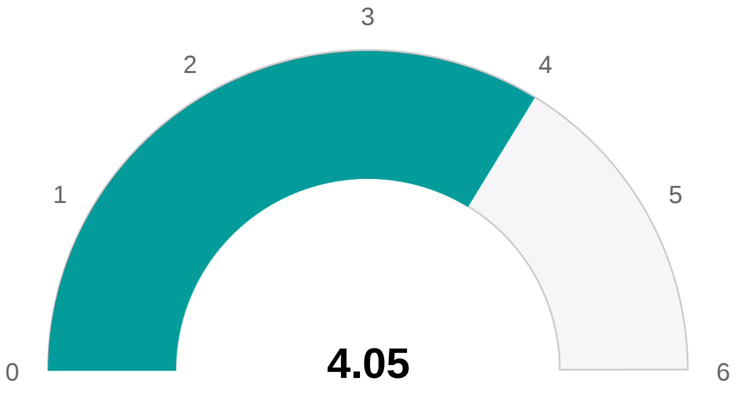
Response Date	Response
21 Jun 2021 02:20 pm	5
21 Jun 2021 03:14 pm	4
21 Jun 2021 03:49 pm	3
22 Jun 2021 09:42 am	6
24 Jun 2021 09:39 am	5
24 Jun 2021 10:20 am	3
25 Jun 2021 05:38 pm	4
28 Jun 2021 01:29 pm	4
30 Jun 2021 08:05 am	4
01 Jul 2021 11:16 am	4
02 Jul 2021 08:03 pm	2
03 Jul 2021 01:41 am	6
05 Jul 2021 10:55 pm	4
07 Jul 2021 12:35 pm	5
07 Jul 2021 12:52 pm	5
07 Jul 2021 01:53 pm	2
09 Jul 2021 10:19 am	3 **Additional text:** Neen. Zou je als klant enkel willen kiezen uit grote spelers die sub-monopolie posities hebben ? Betaal je dan een correcte prijs ?
12 Jul 2021 07:45 am	5
12 Jul 2021 11:26 am	3
12 Jul 2021 07:06 pm	4

8. De facilitaire markt wordt gedomineerd door een aantal grote spelers.



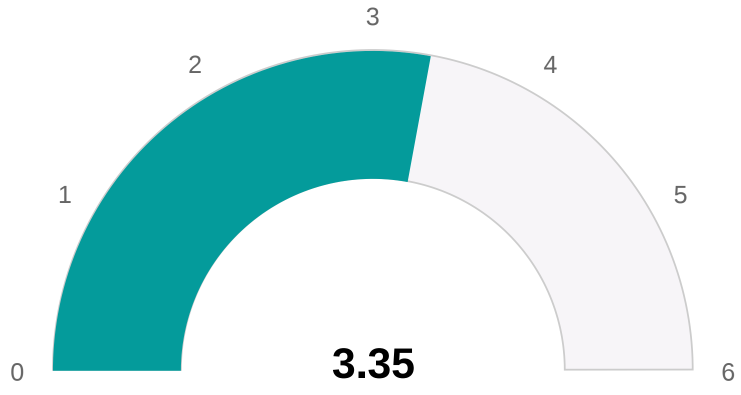
Response Date	Response
21 Jun 2021 02:20 pm	5
21 Jun 2021 03:14 pm	3
21 Jun 2021 03:49 pm	4
22 Jun 2021 09:42 am	4
24 Jun 2021 09:39 am	5
24 Jun 2021 10:20 am	4
25 Jun 2021 05:38 pm	6
28 Jun 2021 01:29 pm	4
30 Jun 2021 08:05 am	4
01 Jul 2021 11:16 am	4
02 Jul 2021 08:03 pm	4
03 Jul 2021 01:41 am	2
05 Jul 2021 10:55 pm	5
07 Jul 2021 12:35 pm	6
07 Jul 2021 12:52 pm	5
07 Jul 2021 01:53 pm	4
09 Jul 2021 10:19 am	3 **Additional text:** nee, zie vorige vraag.
12 Jul 2021 07:45 am	5
12 Jul 2021 11:26 am	4
12 Jul 2021 07:06 pm	5

9. Er is een hoge klantretentie: over het algemeen wisselen de klanten in de Belgische markt niet snel van facilitaire partner.



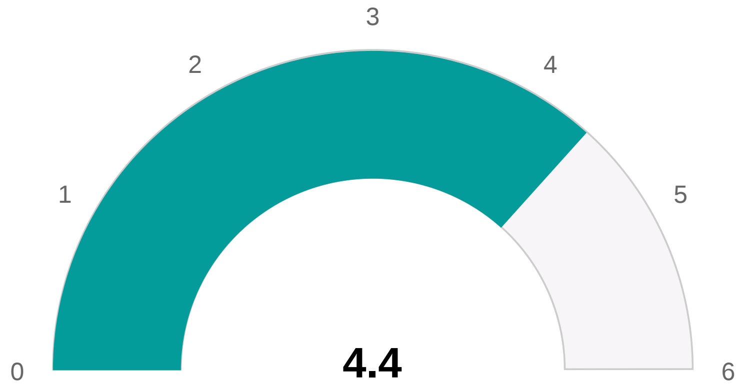
Response Date	Response
21 Jun 2021 02:20 pm	5
21 Jun 2021 03:14 pm	3
21 Jun 2021 03:49 pm	5
22 Jun 2021 09:42 am	2
24 Jun 2021 09:39 am	5
24 Jun 2021 10:20 am	3
25 Jun 2021 05:38 pm	5
28 Jun 2021 01:29 pm	5
30 Jun 2021 08:05 am	5
01 Jul 2021 11:16 am	4
02 Jul 2021 08:03 pm	5
03 Jul 2021 01:41 am	4
05 Jul 2021 10:55 pm	4
07 Jul 2021 12:35 pm	5
07 Jul 2021 12:52 pm	3
07 Jul 2021 01:53 pm	4
09 Jul 2021 10:19 am	4 **Additional text:** Terecht. Indien er vertrouwen is tussen beide partners kan de relatie standhouden. Beiden hebben elkaar nodig.
12 Jul 2021 07:45 am	2
12 Jul 2021 11:26 am	5
12 Jul 2021 07:06 pm	3

10. Er is niet veel verschil in kwaliteit tussen de verschillende facilitaire dienstverleners in de Belgische markt.



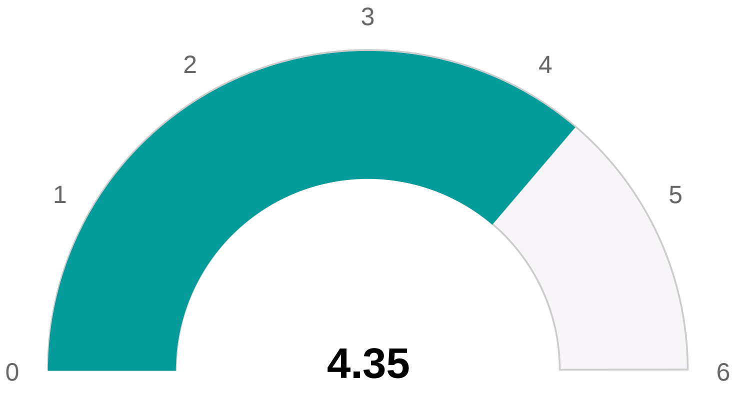
Response Date	Response
21 Jun 2021 02:20 pm	1
21 Jun 2021 03:14 pm	4
21 Jun 2021 03:49 pm	2
22 Jun 2021 09:42 am	1
24 Jun 2021 09:39 am	4
24 Jun 2021 10:20 am	3
25 Jun 2021 05:38 pm	2
28 Jun 2021 01:29 pm	5
30 Jun 2021 08:05 am	5 **Additional text:** ik geloof het ook, het zijn dezelfde personen die bij de andere dienstverleners starten
01 Jul 2021 11:16 am	4
02 Jul 2021 08:03 pm	4
03 Jul 2021 01:41 am	6
05 Jul 2021 10:55 pm	3
07 Jul 2021 12:35 pm	3
07 Jul 2021 12:52 pm	3
07 Jul 2021 01:53 pm	3
09 Jul 2021 10:19 am	5 **Additional text:** Iedereen wil de beste klantenservice geven. Verschil wordt gemaakt door de details, verrassend te zijn en blijven.
12 Jul 2021 07:45 am	1
12 Jul 2021 11:26 am	3
12 Jul 2021 07:06 pm	5

11. Een partij die de facilitaire markt wil betreden moet hiervoor grote investeringen maken (personeel, roerende - en onroerende goederen, kennisverwerving...).



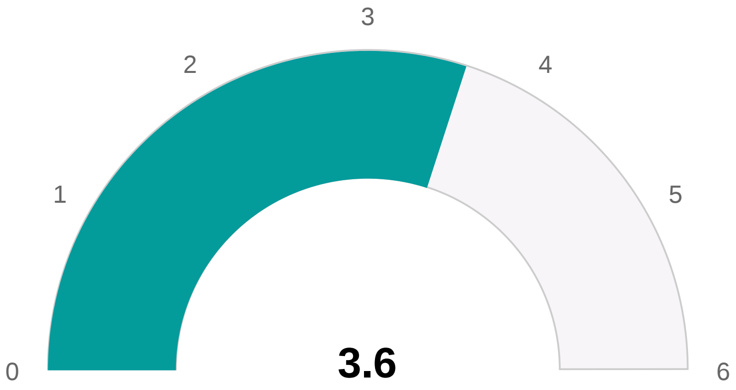
Response Date	Response
21 Jun 2021 02:20 pm	4
21 Jun 2021 03:14 pm	4
21 Jun 2021 03:49 pm	4
22 Jun 2021 09:42 am	5
24 Jun 2021 09:39 am	5
24 Jun 2021 10:20 am	5
25 Jun 2021 05:38 pm	3
28 Jun 2021 01:29 pm	5
30 Jun 2021 08:05 am	5
01 Jul 2021 11:16 am	4
02 Jul 2021 08:03 pm	4
03 Jul 2021 01:41 am	6
05 Jul 2021 10:55 pm	5
07 Jul 2021 12:35 pm	4
07 Jul 2021 12:52 pm	3
07 Jul 2021 01:53 pm	3
09 Jul 2021 10:19 am	4 **Additional text:** Grootste kost is mi personeel om alles op te volgen.
12 Jul 2021 07:45 am	5
12 Jul 2021 11:26 am	5
12 Jul 2021 07:06 pm	5

12. De kwaliteit van een facilitaire dienstverlener is in grote mate afhankelijk van zijn leveranciers en/of partners.



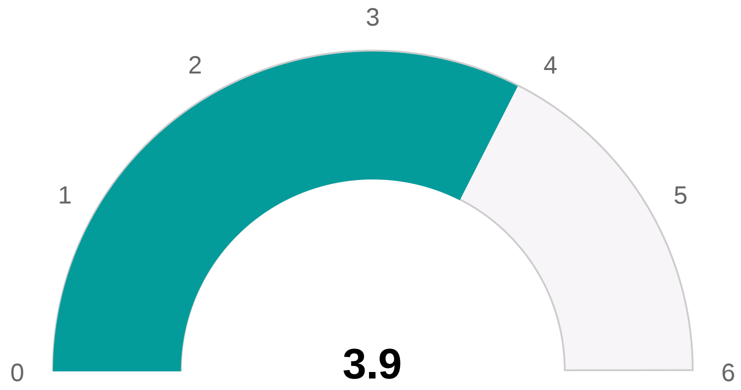
Response Date	Response
21 Jun 2021 02:20 pm	5
21 Jun 2021 03:14 pm	5
21 Jun 2021 03:49 pm	6
22 Jun 2021 09:42 am	4
24 Jun 2021 09:39 am	5
24 Jun 2021 10:20 am	5
25 Jun 2021 05:38 pm	4
28 Jun 2021 01:29 pm	2
30 Jun 2021 08:05 am	5
01 Jul 2021 11:16 am	3
02 Jul 2021 08:03 pm	4
03 Jul 2021 01:41 am	6
05 Jul 2021 10:55 pm	4
07 Jul 2021 12:35 pm	6
07 Jul 2021 12:52 pm	2
07 Jul 2021 01:53 pm	3
09 Jul 2021 10:19 am	3
12 Jul 2021 07:45 am	6
12 Jul 2021 11:26 am	4
12 Jul 2021 07:06 pm	5

13. Een facilitaire dienstverlener heeft in België de keuze uit een ruim aanbod uit leveranciers en/of partners.



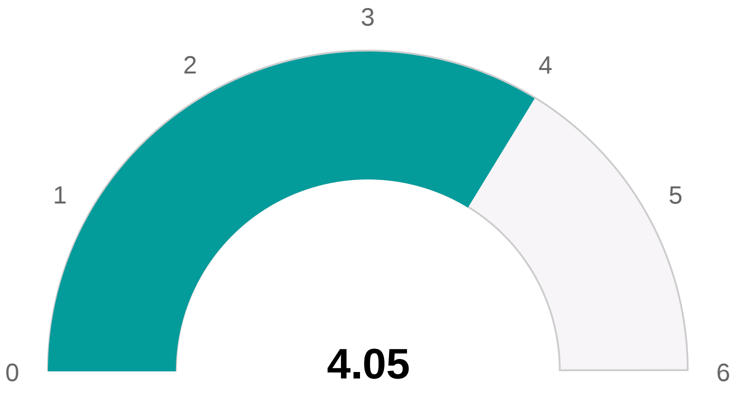
Response Date	Response
21 Jun 2021 02:20 pm	3
21 Jun 2021 03:14 pm	4
21 Jun 2021 03:49 pm	5
22 Jun 2021 09:42 am	1
24 Jun 2021 09:39 am	5
24 Jun 2021 10:20 am	4
25 Jun 2021 05:38 pm	2
28 Jun 2021 01:29 pm	5
30 Jun 2021 08:05 am	4
01 Jul 2021 11:16 am	3
02 Jul 2021 08:03 pm	3
03 Jul 2021 01:41 am	1
05 Jul 2021 10:55 pm	3
07 Jul 2021 12:35 pm	6
07 Jul 2021 12:52 pm	5
07 Jul 2021 01:53 pm	4
09 Jul 2021 10:19 am	3 **Additional text:** Nog te weinig bedrijven spitsen zich toe om samen te werken met facilitaire dienstverleners. Onbekend is onbemind werkt in de 2 richtingen.
12 Jul 2021 07:45 am	4
12 Jul 2021 11:26 am	4
12 Jul 2021 07:06 pm	3

14. Voor de meeste facilitaire noden en/of problemen is outsourcen niet de enige oplossing.



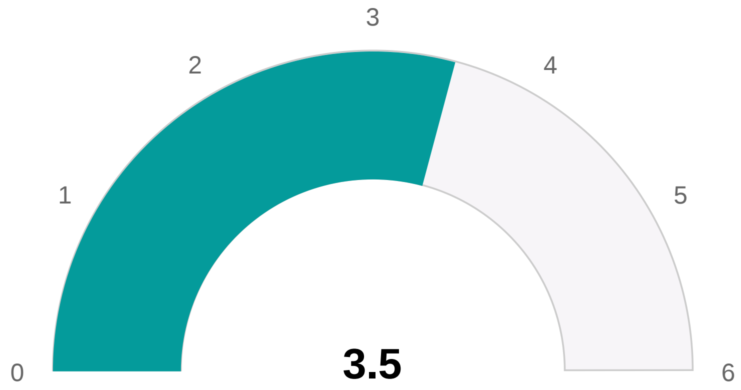
Response Date	Response
21 Jun 2021 02:20 pm	6
21 Jun 2021 03:14 pm	5
21 Jun 2021 03:49 pm	3
22 Jun 2021 09:42 am	6
24 Jun 2021 09:39 am	2
24 Jun 2021 10:20 am	3
25 Jun 2021 05:38 pm	2
28 Jun 2021 01:29 pm	5
30 Jun 2021 08:05 am	3
01 Jul 2021 11:16 am	4
02 Jul 2021 08:03 pm	4
03 Jul 2021 01:41 am	2
05 Jul 2021 10:55 pm	3
07 Jul 2021 12:35 pm	6
07 Jul 2021 12:52 pm	3
07 Jul 2021 01:53 pm	5
09 Jul 2021 10:19 am	4
12 Jul 2021 07:45 am	3
12 Jul 2021 11:26 am	5
12 Jul 2021 07:06 pm	4

15. Het outsourcen van facilitaire diensten is de meest geprefereerde optie voor de meeste bedrijven.



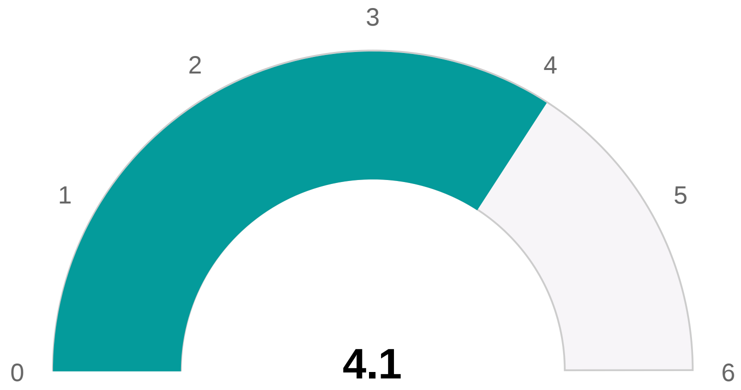
Response Date	Response
21 Jun 2021 02:20 pm	6
21 Jun 2021 03:14 pm	4
21 Jun 2021 03:49 pm	4
22 Jun 2021 09:42 am	3
24 Jun 2021 09:39 am	5
24 Jun 2021 10:20 am	4
25 Jun 2021 05:38 pm	2
28 Jun 2021 01:29 pm	6
30 Jun 2021 08:05 am	5
01 Jul 2021 11:16 am	4
02 Jul 2021 08:03 pm	5
03 Jul 2021 01:41 am	1
05 Jul 2021 10:55 pm	5
07 Jul 2021 12:35 pm	3
07 Jul 2021 12:52 pm	3
07 Jul 2021 01:53 pm	4
09 Jul 2021 10:19 am	4
12 Jul 2021 07:45 am	5
12 Jul 2021 11:26 am	3
12 Jul 2021 07:06 pm	5

16. Een facilitaire dienstverlener kan zonder veel moeite of kosten wisselen van leverancier.



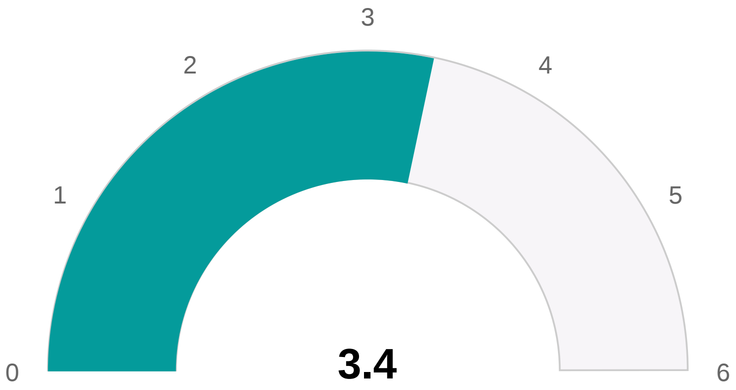
Response Date	Response
21 Jun 2021 02:20 pm	6
21 Jun 2021 03:14 pm	3
21 Jun 2021 03:49 pm	2
22 Jun 2021 09:42 am	2
24 Jun 2021 09:39 am	4
24 Jun 2021 10:20 am	4
25 Jun 2021 05:38 pm	6
28 Jun 2021 01:29 pm	3
30 Jun 2021 08:05 am	2
01 Jul 2021 11:16 am	3
02 Jul 2021 08:03 pm	2
03 Jul 2021 01:41 am	6
05 Jul 2021 10:55 pm	3
07 Jul 2021 12:35 pm	5
07 Jul 2021 12:52 pm	3
07 Jul 2021 01:53 pm	5
09 Jul 2021 10:19 am	4 **Additional text:** Goede afspraken contractueel vastleggen.
12 Jul 2021 07:45 am	2
12 Jul 2021 11:26 am	2
12 Jul 2021 07:06 pm	3

17. De groei van de facilitaire markt is sterk afhankelijk van andere sectoren.



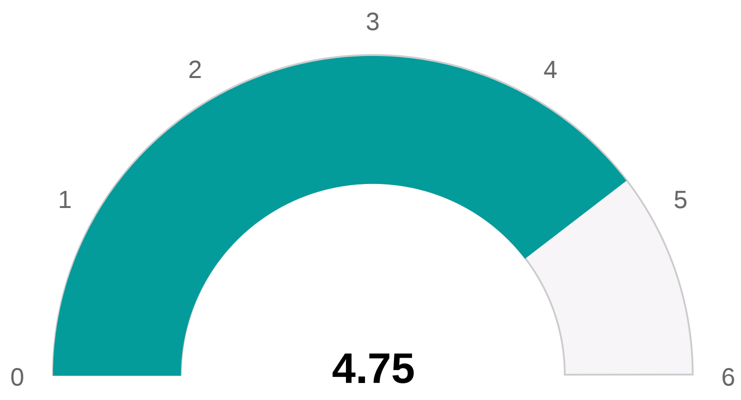
Response Date	Response
21 Jun 2021 02:20 pm	5
21 Jun 2021 03:14 pm	4
21 Jun 2021 03:49 pm	4
22 Jun 2021 09:42 am	6
24 Jun 2021 09:39 am	4
24 Jun 2021 10:20 am	4
25 Jun 2021 05:38 pm	5
28 Jun 2021 01:29 pm	5
30 Jun 2021 08:05 am	2
01 Jul 2021 11:16 am	4
02 Jul 2021 08:03 pm	5
03 Jul 2021 01:41 am	3
05 Jul 2021 10:55 pm	3
07 Jul 2021 12:35 pm	5
07 Jul 2021 12:52 pm	3
07 Jul 2021 01:53 pm	4
09 Jul 2021 10:19 am	4
12 Jul 2021 07:45 am	5
12 Jul 2021 11:26 am	3
12 Jul 2021 07:06 pm	4

18. De koopkracht van klanten van facilitaire dienstverleners neemt af.



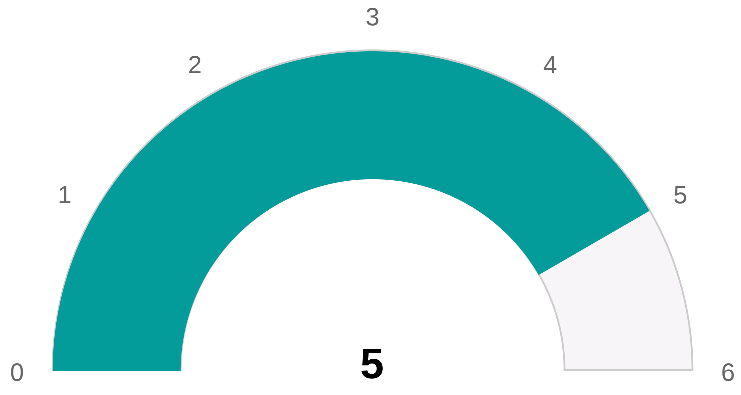
Response Date	Response
21 Jun 2021 02:20 pm	4
21 Jun 2021 03:14 pm	3
21 Jun 2021 03:49 pm	3
22 Jun 2021 09:42 am	5
24 Jun 2021 09:39 am	2
24 Jun 2021 10:20 am	2
25 Jun 2021 05:38 pm	1
28 Jun 2021 01:29 pm	4
30 Jun 2021 08:05 am	2
01 Jul 2021 11:16 am	3
02 Jul 2021 08:03 pm	5
03 Jul 2021 01:41 am	1
05 Jul 2021 10:55 pm	3 **Additional text:** geen zicht op
07 Jul 2021 12:35 pm	6
07 Jul 2021 12:52 pm	5
07 Jul 2021 01:53 pm	2
09 Jul 2021 10:19 am	4 **Additional text:** De koopkracht neemt niet af. Er is wel een leveringsprobleem aanwezig.
12 Jul 2021 07:45 am	6
12 Jul 2021 11:26 am	4
12 Jul 2021 07:06 pm	3

19. Maatschappelijke trends beïnvloeden de noden en/of wensen van werknemers en hebben zo een onrechtstreeks effect op de facilitaire markt.



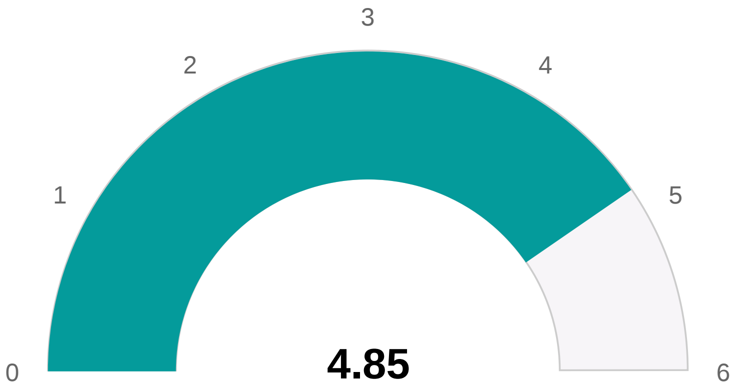
Response Date	Response
21 Jun 2021 02:20 pm	6
21 Jun 2021 03:14 pm	2
21 Jun 2021 03:49 pm	6
22 Jun 2021 09:42 am	4
24 Jun 2021 09:39 am	4
24 Jun 2021 10:20 am	5
25 Jun 2021 05:38 pm	6
28 Jun 2021 01:29 pm	6
30 Jun 2021 08:05 am	5
01 Jul 2021 11:16 am	5
02 Jul 2021 08:03 pm	6
03 Jul 2021 01:41 am	1
05 Jul 2021 10:55 pm	3
07 Jul 2021 12:35 pm	6
07 Jul 2021 12:52 pm	6
07 Jul 2021 01:53 pm	3
09 Jul 2021 10:19 am	4 **Additional text:** Je moet alert blijven dat trends niet gaan overheersen . Het is en blijft een "trend". Gezond verstand gebruiken.
12 Jul 2021 07:45 am	6
12 Jul 2021 11:26 am	5
12 Jul 2021 07:06 pm	6

20. Technologische ontwikkelingen zullen een sterk effect hebben op de facilitaire markt.



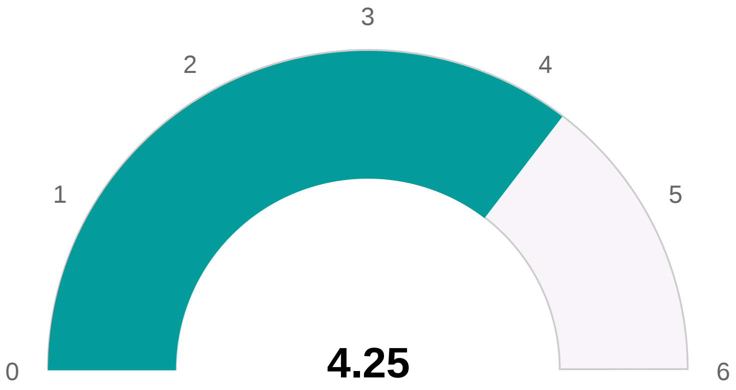
Response Date	Response
21 Jun 2021 02:20 pm	6
21 Jun 2021 03:14 pm	4
21 Jun 2021 03:49 pm	5
22 Jun 2021 09:42 am	5
24 Jun 2021 09:39 am	5
24 Jun 2021 10:20 am	5
25 Jun 2021 05:38 pm	6
28 Jun 2021 01:29 pm	6
30 Jun 2021 08:05 am	5 **Additional text:** digitalisering van bepaalde diensten
01 Jul 2021 11:16 am	5
02 Jul 2021 08:03 pm	5
03 Jul 2021 01:41 am	6
05 Jul 2021 10:55 pm	4
07 Jul 2021 12:35 pm	6
07 Jul 2021 12:52 pm	4
07 Jul 2021 01:53 pm	4
09 Jul 2021 10:19 am	4 **Additional text:** Efficient gebruik van 5G is een must
12 Jul 2021 07:45 am	5
12 Jul 2021 11:26 am	4
12 Jul 2021 07:06 pm	6

21. De ontwikkeling van Smart Buildings zal een sterke invloed hebben op de facilitaire markt.



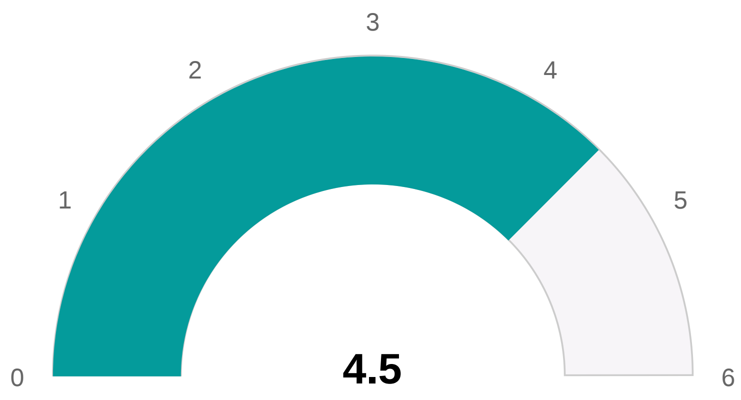
Response Date	Response
21 Jun 2021 02:20 pm	5
21 Jun 2021 03:14 pm	4
21 Jun 2021 03:49 pm	4
22 Jun 2021 09:42 am	6
24 Jun 2021 09:39 am	5
24 Jun 2021 10:20 am	5
25 Jun 2021 05:38 pm	6
28 Jun 2021 01:29 pm	4
30 Jun 2021 08:05 am	5
01 Jul 2021 11:16 am	5
02 Jul 2021 08:03 pm	6
03 Jul 2021 01:41 am	6
05 Jul 2021 10:55 pm	5
07 Jul 2021 12:35 pm	6
07 Jul 2021 12:52 pm	4
07 Jul 2021 01:53 pm	4
09 Jul 2021 10:19 am	4 **Additional text:** De vastgoedmarkt moet werk maken van herziening, herbestemming van lege kantoorgebouwen. Waarom geen mix van wonen en kantoren in 1 gebouw ?
12 Jul 2021 07:45 am	4
12 Jul 2021 11:26 am	3
12 Jul 2021 07:06 pm	6

22. Op dit moment is er nog een drempelvrees in de facilitaire markt die de investering in technologische middelen belemmert.



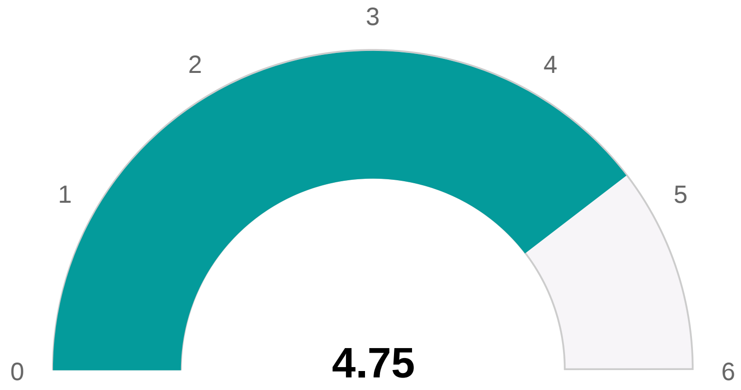
Response Date	Response
21 Jun 2021 02:20 pm	5
21 Jun 2021 03:14 pm	4
21 Jun 2021 03:49 pm	4
22 Jun 2021 09:42 am	3
24 Jun 2021 09:39 am	5
24 Jun 2021 10:20 am	3
25 Jun 2021 05:38 pm	6
28 Jun 2021 01:29 pm	5
30 Jun 2021 08:05 am	4
01 Jul 2021 11:16 am	5
02 Jul 2021 08:03 pm	2
03 Jul 2021 01:41 am	6
05 Jul 2021 10:55 pm	3
07 Jul 2021 12:35 pm	4
07 Jul 2021 12:52 pm	4
07 Jul 2021 01:53 pm	4
09 Jul 2021 10:19 am	5 **Additional text:** Een concrete facilitaire markt waar leveranciers hun producten kunnen tonen. Geen "show" ala Facility nights .
12 Jul 2021 07:45 am	5
12 Jul 2021 11:26 am	4
12 Jul 2021 07:06 pm	4

23. Milieubewuste bedrijfsvoering is een vereiste voor de meeste klanten van facilitaire dienstverleners.



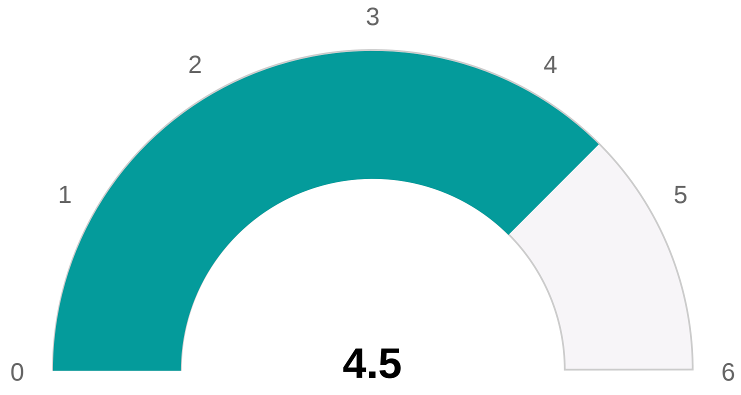
Response Date	Response
21 Jun 2021 02:20 pm	6
21 Jun 2021 03:14 pm	5
21 Jun 2021 03:49 pm	4
22 Jun 2021 09:42 am	5
24 Jun 2021 09:39 am	5
24 Jun 2021 10:20 am	5
25 Jun 2021 05:38 pm	1
28 Jun 2021 01:29 pm	3
30 Jun 2021 08:05 am	5
01 Jul 2021 11:16 am	4
02 Jul 2021 08:03 pm	5
03 Jul 2021 01:41 am	1
05 Jul 2021 10:55 pm	4
07 Jul 2021 12:35 pm	5
07 Jul 2021 12:52 pm	6
07 Jul 2021 01:53 pm	6
09 Jul 2021 10:19 am	5 **Additional text:** De uitdaging en specialisatie tak binnen facility.
12 Jul 2021 07:45 am	5
12 Jul 2021 11:26 am	5
12 Jul 2021 07:06 pm	5

24. Huidige en toekomstige milieuwetgeving, zowel nationaal als internationaal, zal een grote impact op de facilitaire markt hebben.



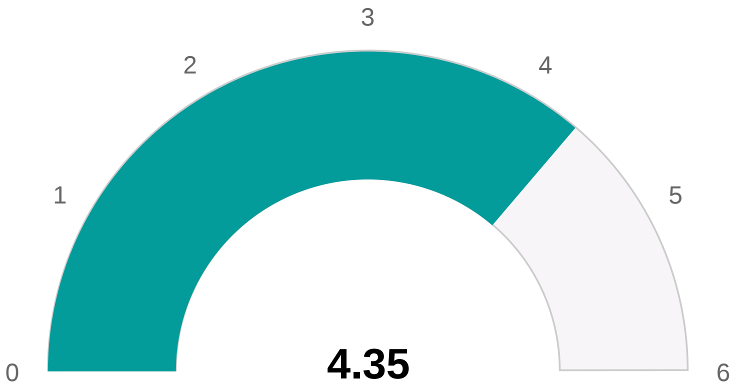
Response Date	Response
21 Jun 2021 02:20 pm	5
21 Jun 2021 03:14 pm	5
21 Jun 2021 03:49 pm	2
22 Jun 2021 09:42 am	5
24 Jun 2021 09:39 am	6
24 Jun 2021 10:20 am	5
25 Jun 2021 05:38 pm	6
28 Jun 2021 01:29 pm	6
30 Jun 2021 08:05 am	5
01 Jul 2021 11:16 am	4
02 Jul 2021 08:03 pm	4
03 Jul 2021 01:41 am	1
05 Jul 2021 10:55 pm	4
07 Jul 2021 12:35 pm	6
07 Jul 2021 12:52 pm	6
07 Jul 2021 01:53 pm	5
09 Jul 2021 10:19 am	5
12 Jul 2021 07:45 am	5
12 Jul 2021 11:26 am	4
12 Jul 2021 07:06 pm	6

25. Het verkrijgen van de nodige vergunningen en certificeringen brengt een grote investering in tijd en/of budget met zich mee.



Response Date	Response
21 Jun 2021 02:20 pm	6
21 Jun 2021 03:14 pm	4
21 Jun 2021 03:49 pm	3
22 Jun 2021 09:42 am	3
24 Jun 2021 09:39 am	5
24 Jun 2021 10:20 am	4
25 Jun 2021 05:38 pm	6
28 Jun 2021 01:29 pm	4
30 Jun 2021 08:05 am	2
01 Jul 2021 11:16 am	3
02 Jul 2021 08:03 pm	5
03 Jul 2021 01:41 am	6
05 Jul 2021 10:55 pm	4
07 Jul 2021 12:35 pm	6
07 Jul 2021 12:52 pm	6
07 Jul 2021 01:53 pm	5
09 Jul 2021 10:19 am	4
12 Jul 2021 07:45 am	5
12 Jul 2021 11:26 am	5
12 Jul 2021 07:06 pm	4

26. Veranderingen in arbeidswetgeving hebben een grote impact op de facilitaire markt.



Response Date	Response
21 Jun 2021 02:20 pm	6
21 Jun 2021 03:14 pm	5
21 Jun 2021 03:49 pm	6
22 Jun 2021 09:42 am	6
24 Jun 2021 09:39 am	4
24 Jun 2021 10:20 am	3
25 Jun 2021 05:38 pm	1
28 Jun 2021 01:29 pm	6
30 Jun 2021 08:05 am	3
01 Jul 2021 11:16 am	3
02 Jul 2021 08:03 pm	6
03 Jul 2021 01:41 am	6
05 Jul 2021 10:55 pm	4
07 Jul 2021 12:35 pm	4
07 Jul 2021 12:52 pm	4
07 Jul 2021 01:53 pm	4
09 Jul 2021 10:19 am	5 **Additional text:** Ja, beweging naar home working is ingezet en heeft invloed op meerdere vlakken
12 Jul 2021 07:45 am	4
12 Jul 2021 11:26 am	4
12 Jul 2021 07:06 pm	3

27. Wil je Gigantisme van Geert Noels winnen? Laat dan hier je gegevens achter. Naar dit e-mailadres zal Market Research Institute en partners het verslag van deze enquête sturen. Let op: we vragen verplicht je functietitel om jouw antwoorden in context te plaatsen.

Voor- en achternaam

Answered	100% (20)

Functietitel

Answered	100% (20)

Bedrijf

Answered	100% (20)

E-mailadres

Answered	100% (20)

Response Date	Response
21 Jun 2021 02:20 pm	Voor- en achternaam -> John de Guytenaer Functietitel -> Zaakvoerder / bezieler Bedrijf -> Agro-Thrill E-mailadres -> info@agrothrill.be
21 Jun 2021 03:14 pm	Voor- en achternaam -> Stefan Coenen Functietitel -> Directeur Bedrijf -> School of Expert Education UHasselt E-mailadres -> stefan.coenen@UHasselt.be
21 Jun 2021 03:49 pm	Voor- en achternaam -> Tom Renckens Functietitel -> Advocaat Bedrijf -> Solvimus E-mailadres -> tom@solvimus.be
22 Jun 2021 09:42 am	Voor- en achternaam -> Steven Goetstouwers Functietitel -> CEO Bedrijf -> Admesy E-mailadres -> steven.goetstouwers@admesy.com
24 Jun 2021 09:39 am	Voor- en achternaam -> Steven De Schoesitter Functietitel -> Facility Manager Bedrijf -> Facilicom E-mailadres -> steven.de.schoesitter@facilicomfs.be
24 Jun 2021 10:20 am	Voor- en achternaam -> Bart Grymonprez Functietitel -> FM Bedrijf -> Facilicom E-mailadres -> bart.grymonprez@facilicomfs.be
25 Jun 2021 05:38 pm	Voor- en achternaam -> Janny To Functietitel -> Facility Manager Bedrijf -> Facilicom E-mailadres -> janny.to@facilicomfs.be
28 Jun 2021 01:29 pm	Voor- en achternaam -> Tom Renckens Functietitel -> Advocaat Bedrijf -> Solvimus E-mailadres -> tom@solvimus.be

Response Date	Response
30 Jun 2021 08:05 am	Voor- en achternaam -> Jan Schellemans Functietitel -> Facility Manager Bedrijf -> Facilicom E-mailadres -> jan.schellemans@gmail.com
01 Jul 2021 11:16 am	Voor- en achternaam -> Ashley Wouters Functietitel -> Marketing & Communication Manager Bedrijf -> Facilicom E-mailadres -> ashley.wouters@facilicom.be
02 Jul 2021 08:03 pm	Voor- en achternaam -> Kristof verhulst Functietitel -> Lead buyer facility manager Bedrijf -> Deceunick E-mailadres -> kristof.verhulst@deceuninck.com
03 Jul 2021 01:41 am	Voor- en achternaam -> Herman Loose Functietitel -> Adviseur Bedrijf -> Mister Cleaning E-mailadres -> herman.loose@mister-cleaning.be
05 Jul 2021 10:55 pm	Voor- en achternaam -> joeri heleijn Functietitel -> Project manager elektriciteit Bedrijf -> buro Nexus E-mailadres -> joeri.heleijn@gmail.com
07 Jul 2021 12:35 pm	Voor- en achternaam -> Wouter Ommeslag Functietitel -> Directeur Bedrijf -> Facilicom Solutions E-mailadres -> wouter.ommeslag@facilicom.be
07 Jul 2021 12:52 pm	Voor- en achternaam -> Bart Bare Functietitel -> Partner Bedrijf -> OBSIN Security E-mailadres -> bart@obsin.be
07 Jul 2021 01:53 pm	Voor- en achternaam -> Brigit Pieraerts Functietitel -> Facility coördinator Bedrijf -> Facilicom E-mailadres -> brigitte.pieraerts@facilicomfs.be
09 Jul 2021 10:19 am	Voor- en achternaam -> Werner Tuyteleers Functietitel -> Facility manager Bedrijf -> Facilicom Solutions E-mailadres -> werner.tuyteleers@facilicomfs.be
12 Jul 2021 07:45 am	Voor- en achternaam -> Mathias Germeau Functietitel -> Development & Project Manager Bedrijf -> Facilicom Solutions E-mailadres -> Mathias.Germeau@buildingmaintenance.be
12 Jul 2021 11:26 am	Voor- en achternaam -> Guy Eeckhout Functietitel -> Facility Mgr & Safety Advisor Bedrijf -> Argenx bv E-mailadres -> geeckhout@argenx.com
12 Jul 2021 07:06 pm	Voor- en achternaam -> Davy Van Den Meerssche Functietitel -> Founder Bedrijf -> Core Fm E-mailadres -> hello@corefm.bv