

Facility Management Trends in Europe



Facility Management Forum 2020 poster with Japanese text. The poster features the title 'FACILITY MANAGEMENT FORUM 2020' in large, colorful letters. Below it, the Japanese text reads '第14回 日本ファシリティマネジメント大会' (14th Japan Facility Management Conference) and '人フォーカスの時代' (The Era of People Focus). The dates are listed as '2020年2月19日(土)~2月21日(月)'. The poster also includes the tagline 'ファシリティマネジメントが拓く未来' (The future opened by facility management).

Introduction

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Global Product Strategy & Innovation

Co-authored

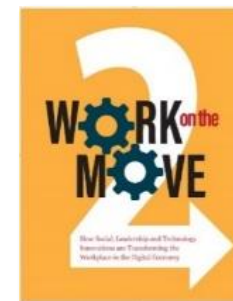
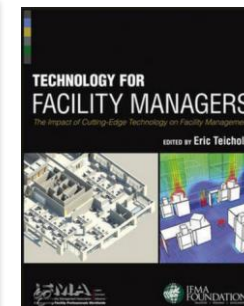
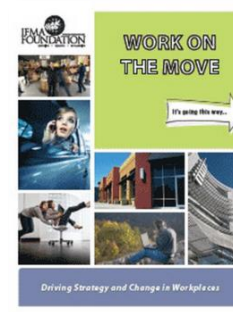
- IFMA
European Advisory Board
member



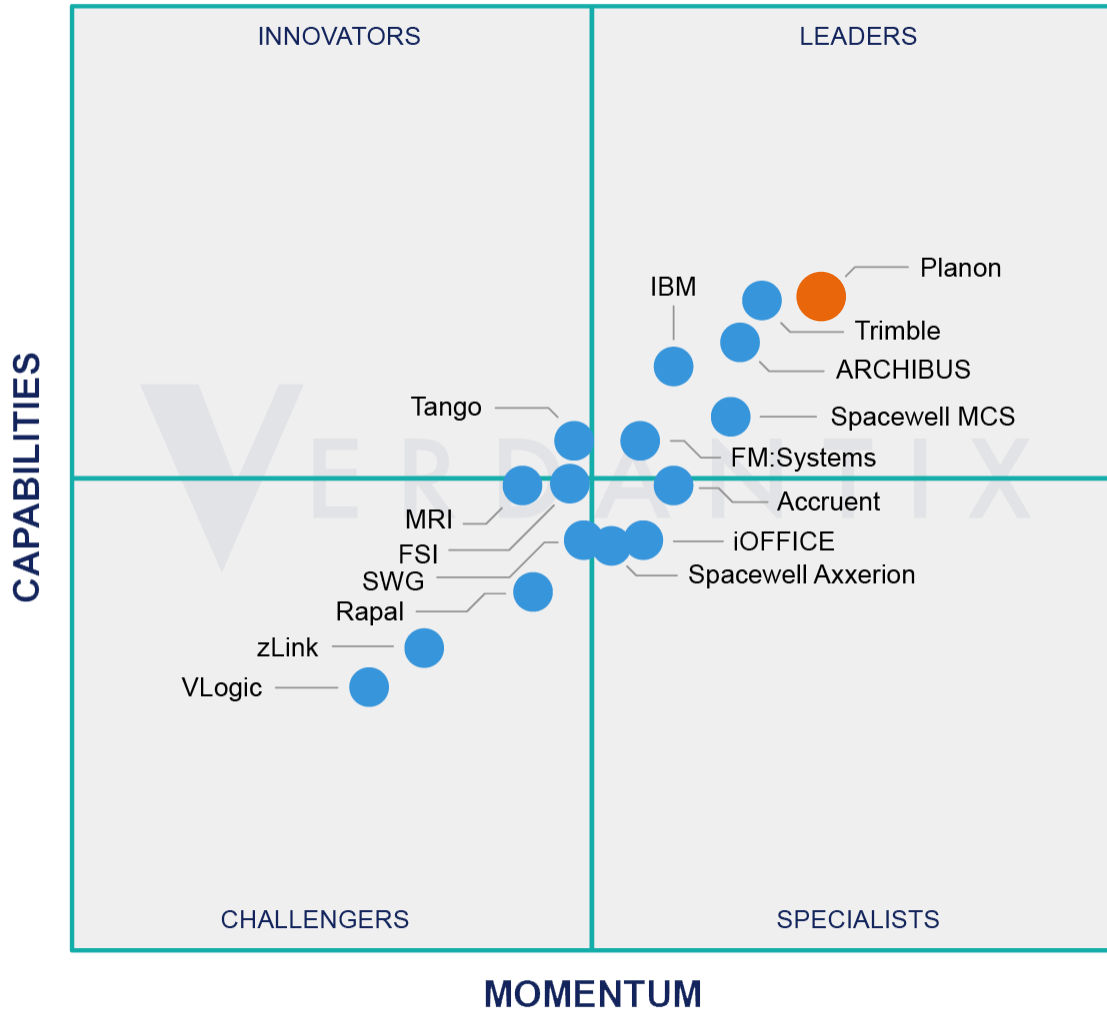
- IFMA RBI
Research & Benchmarking Institute
board member

- IFMA Foundation
Special Advisor

- GEFMA
Arbeitskreis Digitalisierung
(CAFM) member



VERDANTIX



+35 years
EXPERIENCE



+2500
CUSTOMERS



+750
EMPLOYEES



+2 million
USERS



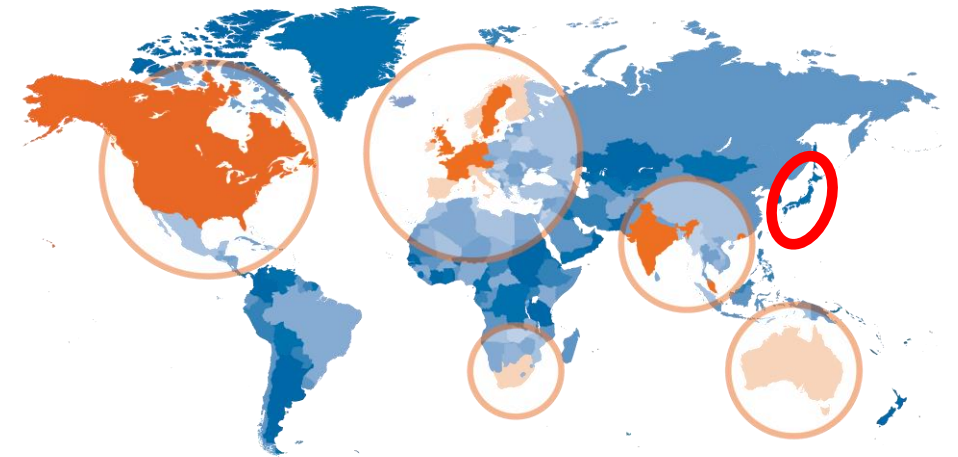
15-20%
AVERAGE YEARLY GROWTH



20%
YEARLY INVESTMENT R&D

We support our customers around the world:

Austria, Belgium, Canada, France, Germany, Hong Kong, India, Netherlands, Sweden, Singapore, United Kingdom, United States



- **Outsourcing of FM Services continues**
- **Focus on Efficiency continues**
- **Digitization of the Profession**
- **Sustainability identified as an Economic Factor**
- **Workplace: FM as a Force in the Battle for Talent**

Life Cycle Management



Costs



Sustainability



Uptime



Efficiencies



Image



Wellbeing



Health



Comfort



Convenience



Productivity

Building Users



Digitization Trend: Adoption of Property Technology

High-level overview of current LPWAN technologies

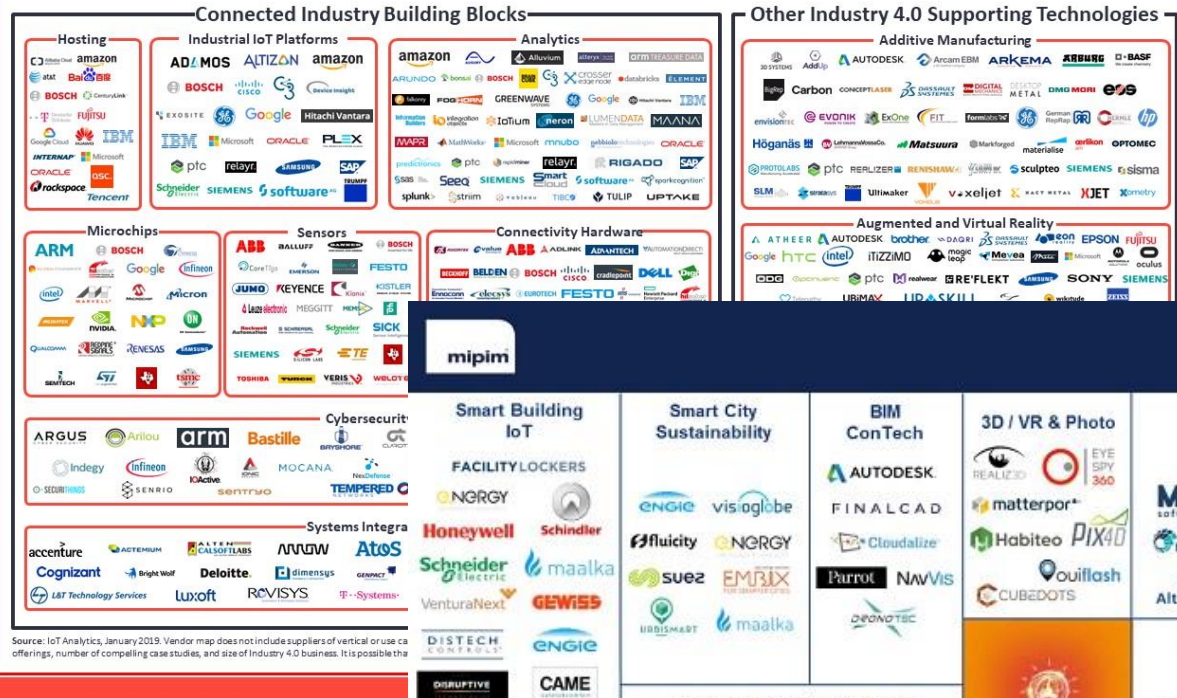


Licensed spectrum
Low-power technologies that use the licensed spectrum

- NB-IoT
- LTE-M
- EC-GSM-IoT
- THINGSTREAM

Source: IoT Analytics LPWAN

Leading Industry 4.0 Vendors 2019



Source: IoT Analytics, January 2019. Vendor map does not include suppliers of vertical or use case offerings, number of compelling case studies, and size of Industry 4.0 business. It is possible the

INNOVATION FORUM m

mipim

WIRED SCORE

DISRUPTIVE

PARIS CO

FIGURE 7

Tech Deployment Drivers

“How important are the following drivers for the implementation of new technology in the buildings assets you manage?”

Ability to achieve and maintain compliance 30% 53% 15% 2

Drivers for Investment

- Ability to Achieve and Maintain Compliance
- Greater Operating Cost Efficiencies
- Easier Reporting on Building Performance
- Greater Capex Efficiencies over Life Cycle
- Better Operational Visibility
- Ability to Manage more Flexible Space
- Higher Quality Tenants

N = 101

Source: Verdantix

Note: Verdantix ranked the data by the first two responses and wrote all percentages below 5% as numbers for presentational purposes.

FIGURE 4

Asset Manager Tech Preferences

“Which technology solutions do you advise real estate investors to consider for their portfolio buildings?”

Technology Preferences

- EV Charging Points
- Property Management Software
- Building Management Systems
- Environmental Sensors
- LED Lighting
- Smart Lighting Controls
- Energy Management Software

N = 101

Source: Verdantix

Note: Verdantix ranked the data by the first two responses and wrote all percentages below 5% as numbers for presentational purposes.

Digitization Trend:

Adoption of Property Technology

Opening Keynote - "HappyBrain: Dynamic Mindsets & Creative Thinking in the Agile World"

Johnny Sundin

Wednesday 18, March | 9:30 - 10:30

We are in an extraordinarily challenging, exciting and even scary window in history right now. Change happens at warp speed. When facing disruptive technologies, new ways of working and a gig-economy, we have to re-think how we think.



We will need to understand how technology is to be applied, so that it supports us in enhancing our services

while

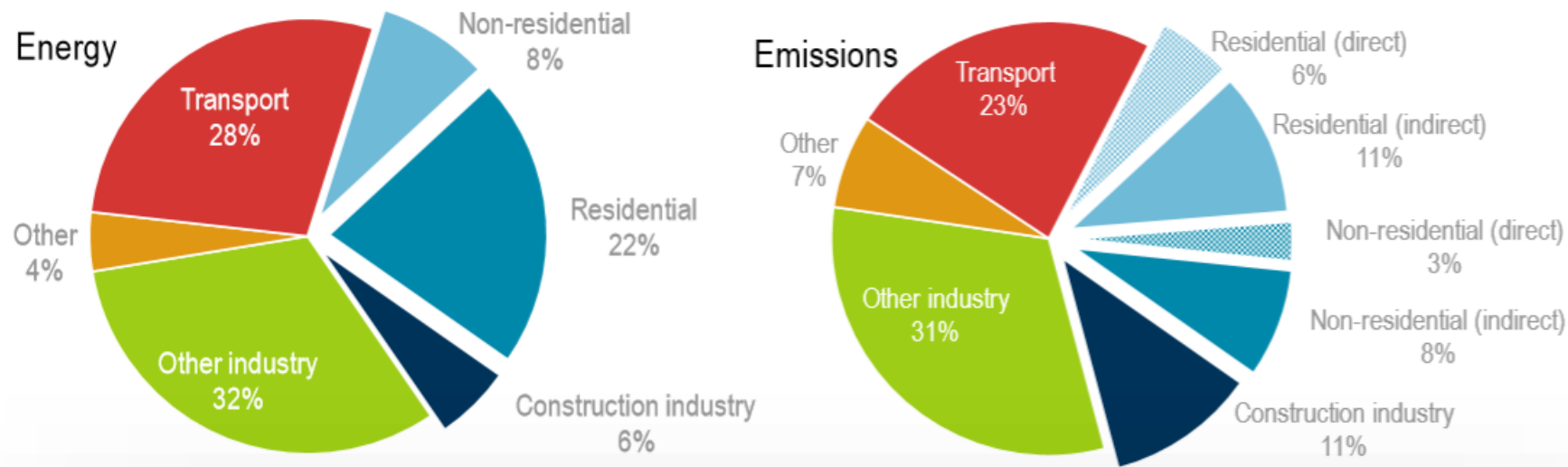
doing it in ways fitting to culture, ethics and human nature.

Climate stripes: avg. Global Temperature over past 150 Years.
Ed Hawkins, National Centre of Atmospheric Science, University of Reading, UK

Energy and emissions in the buildings and construction sector

Building construction and operations accounted for the largest share of both global final energy use (36%) and energy-related CO₂ emissions (39%) in 2018 (Figure 2).

Figure 2 • Global share of buildings and construction final energy and emissions, 2018



Building Construction & Operations account for the largest share of energy use and related CO₂ emissions (approx. 40%)

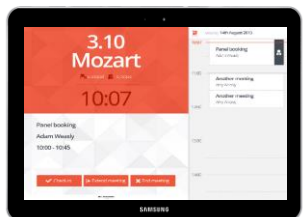


EU becoming the world's first climate-neutral continent by 2050

Buildings are responsible for **approx. 40% of CO2 Emissions**¹

- Sustainable technologies – stimulation of development
- Carbon / Nitrogen – taxing as an option
- compliance regulations

Workplaces are a key distinguisher in Talent attraction and retention



Collaboration



Workplace Design



Wellbeing

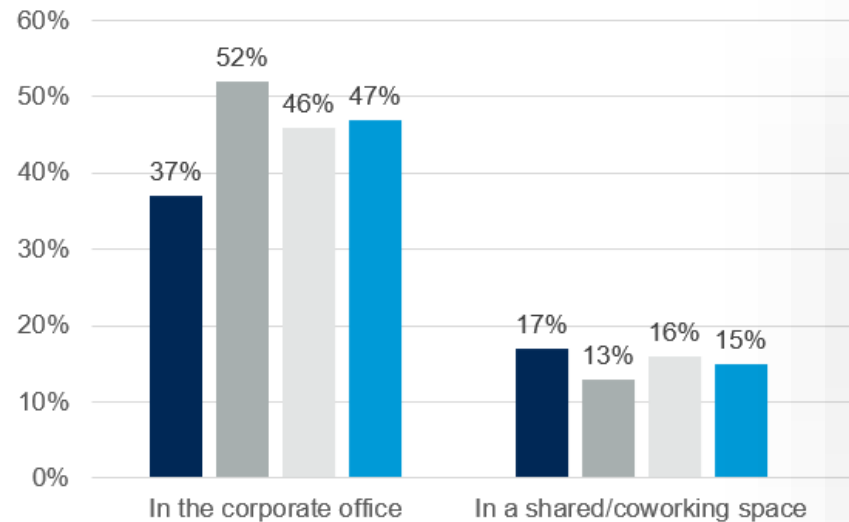


Employee Services

Where Employees Prefer to Work

If you could make the schedule yourself, what proportion of time would you like to spend working ...?

Average proportion of time

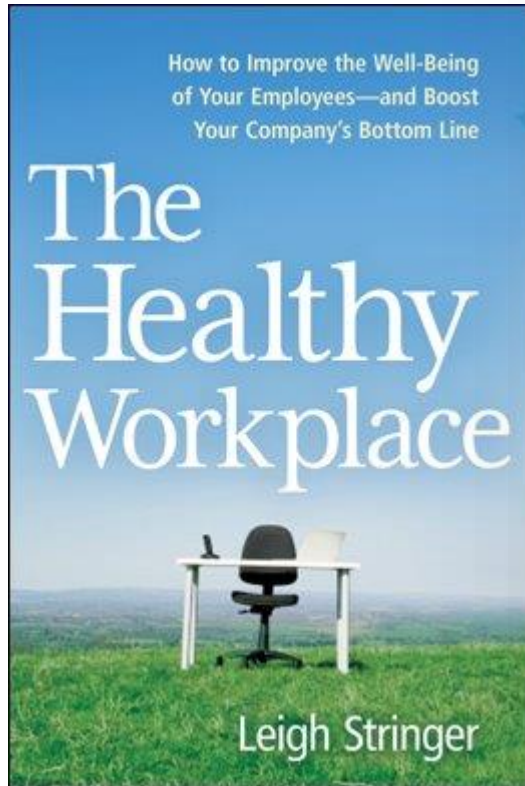


Base: All respondents, excluding DK

■ U.S. (n=1,217) ■ Europe (n=2,253) ■ APAC (n=3,423) ■ Total (n=6,892)

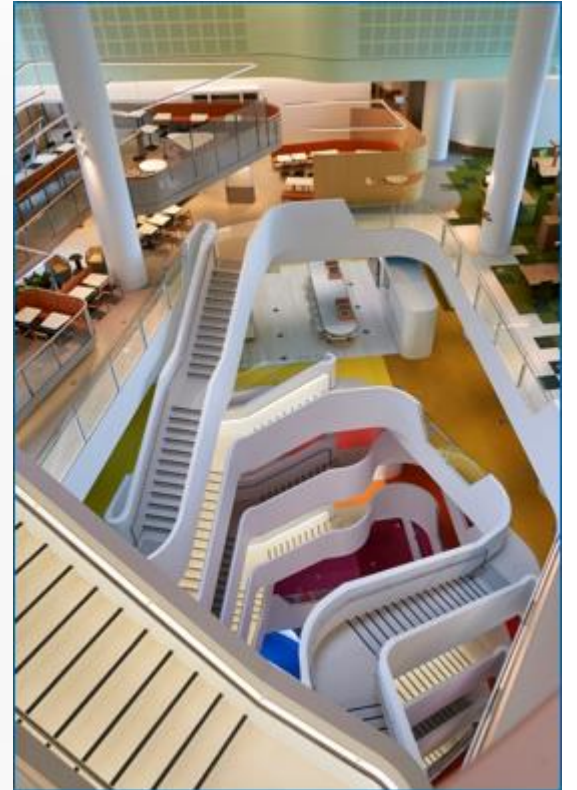
Where Employees Prefer to Work:

- Corporate Spaces Preferred (approx. **50%**)
- Working from Home Significant (approx. **25%**)



Focus on Health and Wellbeing

- Air Quality
- Water Quality
- Nourishment
- Lighting conditions (natural light)
- Fitness (design considerations)
- Comfort
- Mind



- Strategic FM Framework, IFMA, RICS, 2018
- Digital Worker Workplace Preferences, Gartner, 2020
- Global Energy Perspective 2019: reference Case, McKinsey, January 2019
- Global Real Estate Asset Manager Survey 2019 Priorities And Tech Preferences, Verdantix, 2019
- Health, Wellbeing & Productivity in Offices, World Green Building Council, 2014
- Work on the Move 2: IFMA Foundation, 2016
- The Workplace Experience Revolution, Leesman, 2018
- Hype Cycle for the Digital Workplace, Gartner, 2019
- 2019 Global Status report, Global Alliance for Buildings and Construction, UN, 2019
- FM Trend Report Belgium, IFMA Belgium Chapter, 2020

Thank you

