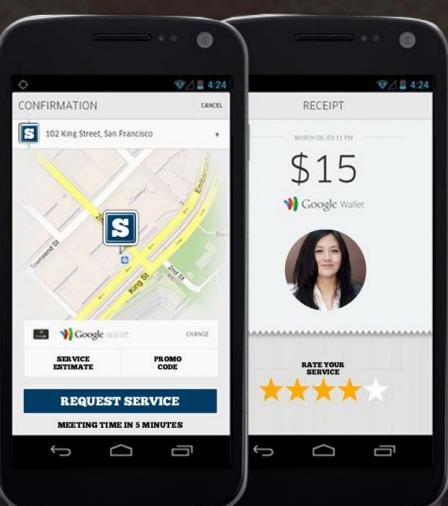


SERVICE COMPANY 2020?:





SERVICE COMPANY 2020?:

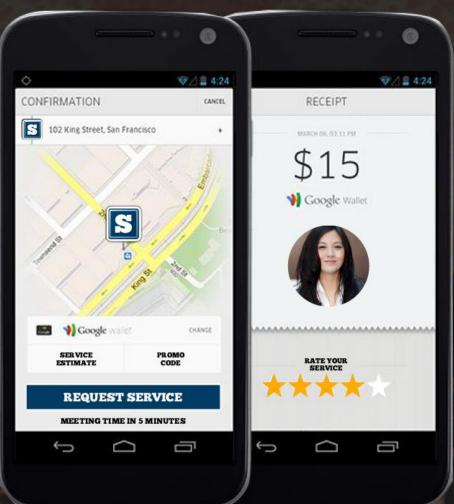
EFFECT ON THE MARKET:

Intense price pressure

Dramatically increased competition

High sympathy for disrupter





SERVICE COMPANY 2020?:

EFFECT ON THE MARKET:

Intense price pressure

Dramatically increased competition

High sympathy for disrupter



REACTION
FROM EXISTING
SUPPLIERS:

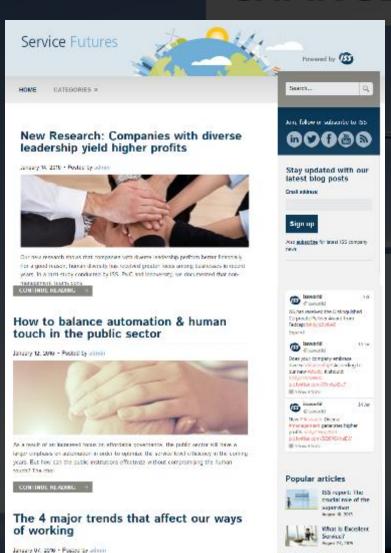
Denial

Resistance

Re-engineering



CHANGE



NOW!



Launch: March 2011

Aim: Provide scenarios for the future of Global FM.

Launch: October 2013

Aim: Provide insight and knowledge on one of the hottest trends within FM; New Ways of Working.



Launch: Sep '14 (Public) & Jan '16 (Private)

Aim: Provide more insight into outsourcing as a key strategic tool.



Launch: 2016 (September??)

Aim: Provide inspiration and insight into Service Management in terms of new development and processes.



Understand the strategic drivers of change

Identify key focus areas, **trends and driving forces** that are expected to shape FM/IFS and the Outsourced Services Industry – 5 to 10 years from now

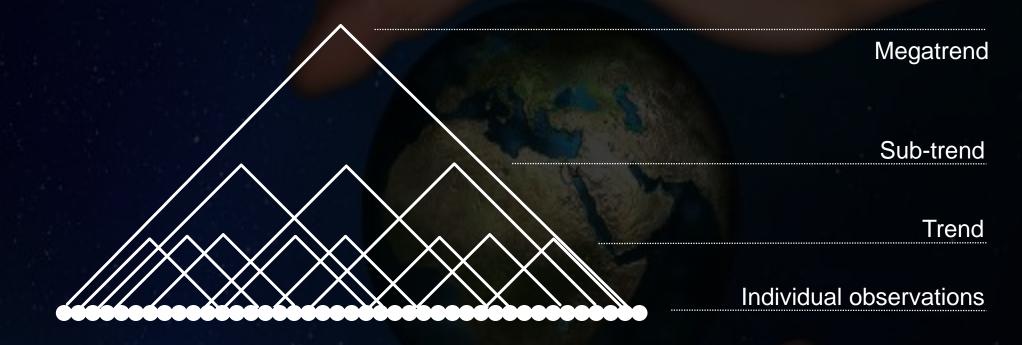
Discover new areas of development and innovation

Outline emerging technologies, concepts and sourcing approaches including new models of collaboration that will shape our industry towards 2020 and beyond

Demonstrate Thought Leadership to engage customers in dialogue

Create a tool for dialogue (individual as well as groups) concerning where the **FM/IFS and Outsourced Services industry** is heading and what "we" can do to influence/take advantage of the changes (and insight).

MEGATRENDS



MEGATRENDS

Commercialization

Demographic development

Focus on health

Individualization

Globalization

Network society

Immaterialization

Sustainability

Knowledge society

Polarization

Democratization

Acceleration and complexity

Economic growth

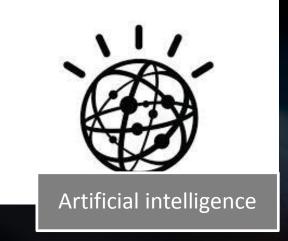
Technological development

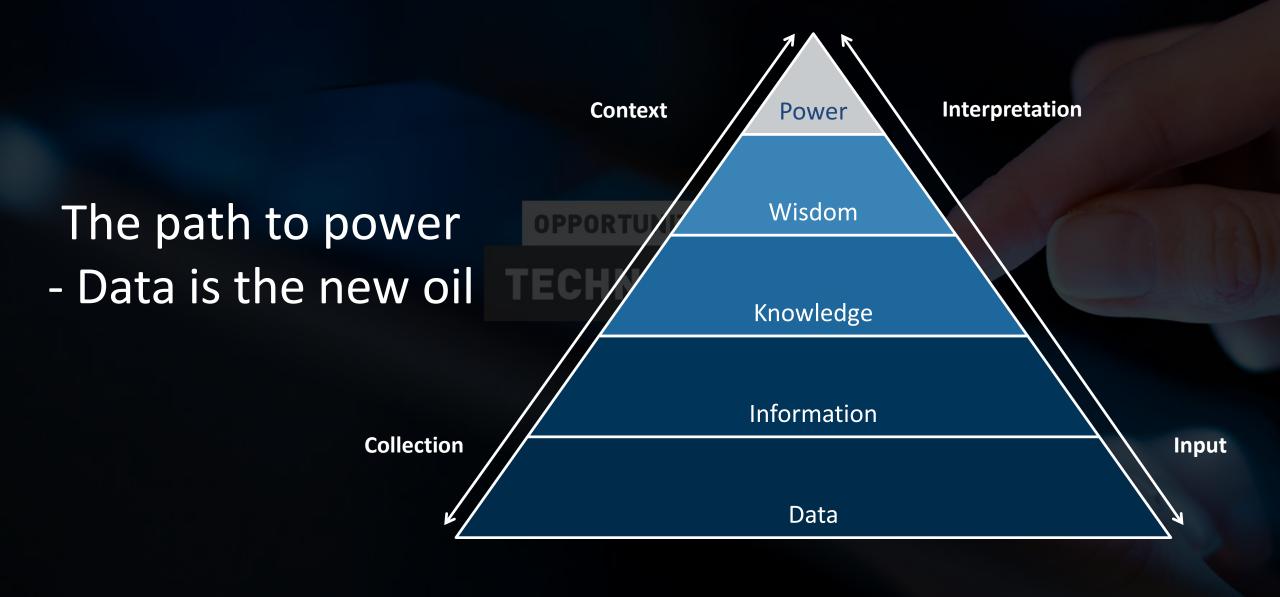




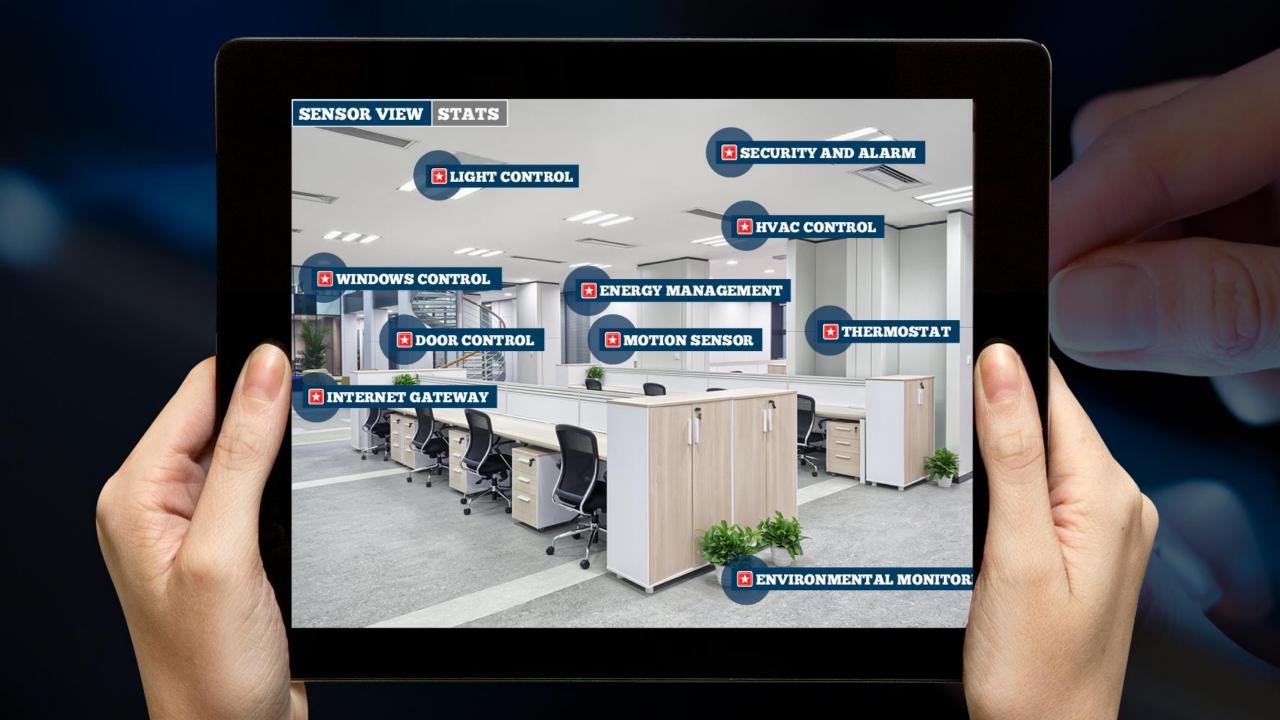


































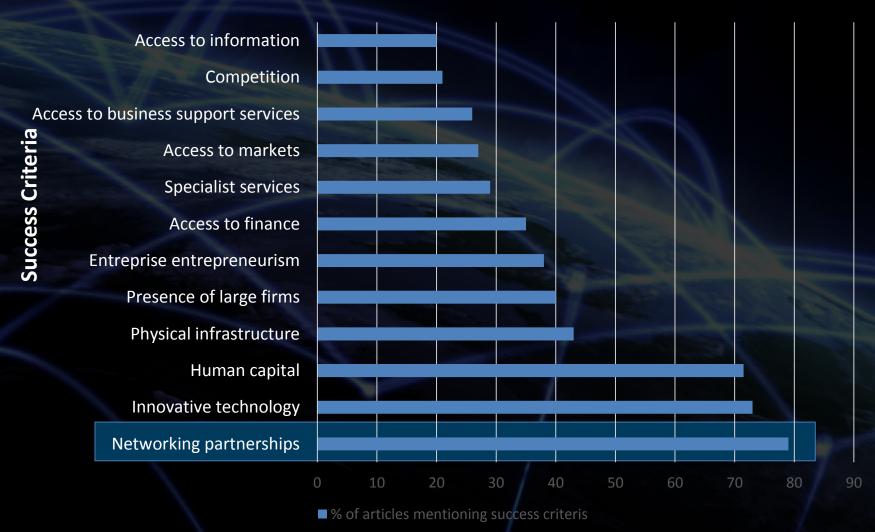






NETWORK SOCIETY

Critical success factor identified within establishment in new markets



NETWORK SOCIETY







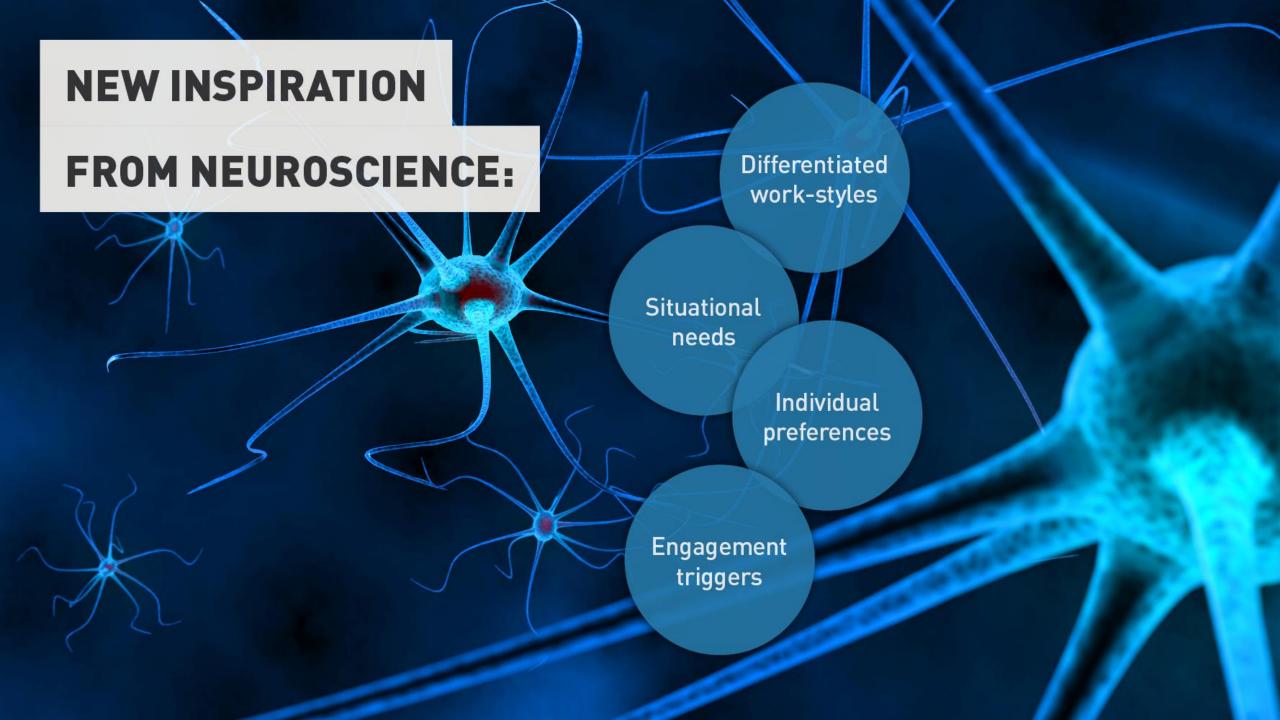














 More agile and flexible organizational structures

Sourcing reasons

 Closer to core business areas

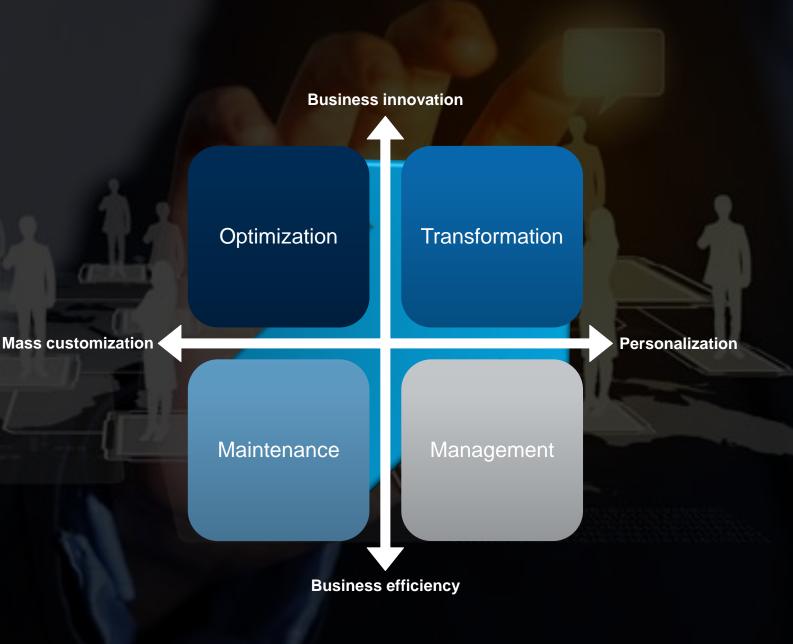
Sourcing areas

 Fewer defined commitments between employees and employers Sourcing impact on employees

Sourcing arrangements

 More lean and flexible, often with shared goals and risks

FM/IFS is growing towards value adding areas



INPUT

(Tactical/transactional)



HOURS

OUTPUT

(Process optimization)



KPI'S

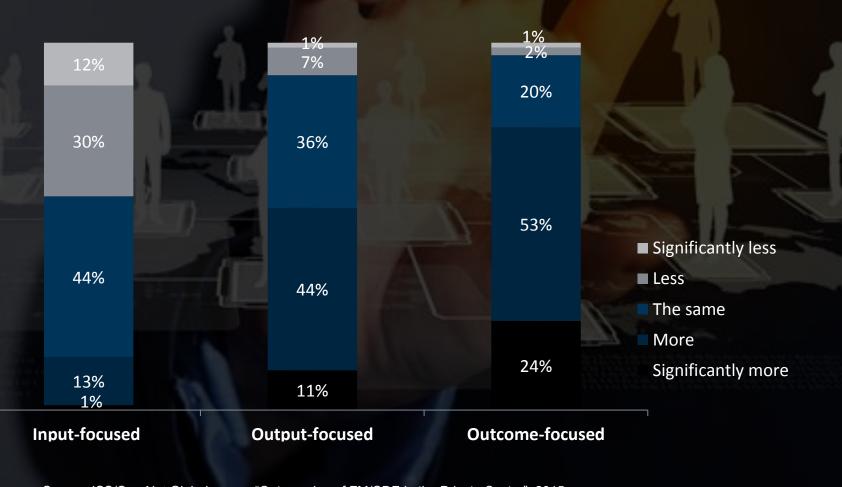
OUTCOME

(Business Transformation)



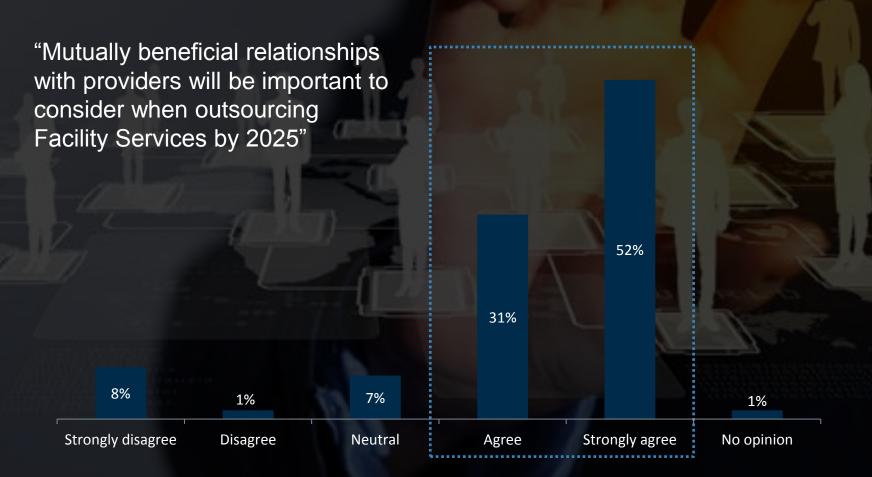
VALUE

What are the types of outsourcing models for Facility Services your company will be likely to use by 2025?



Source: ISS/CoreNet Global survey "Outsourcing of FM/CRE in the Private Sector", 2015

MUTUALLY BENEFICIAL RELATIONSHIPS WILL GROW IN IMPORTANCE



Source: ISS & CoreNet Global and CIFS' survey "Outsourcing of FM7CRE in the Private Sector", 2015

CRITICAL SUCCESS FACTORS

Speed & accessibility is of the essence

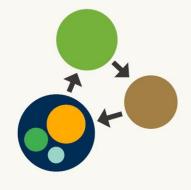
 Cost effectiveness & documentation is critical Transparency forevermore

KISS'ing wins

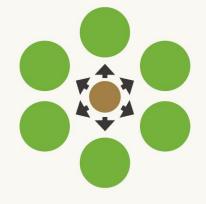
Trust as an asset

MORE INTERDEPENDENCE

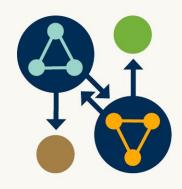
Crowd Sourcing



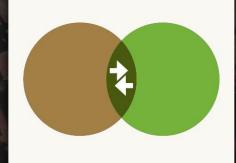
Solution Sourcing



Network Sourcing



Co-Sourcing



Mesh Sourcing



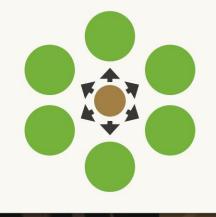
MORE TRANSACTIONAL



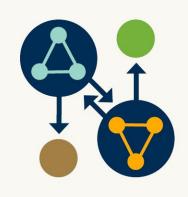
→MORE INTERDEPENDENCE



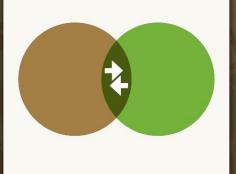
Solution Sourcing



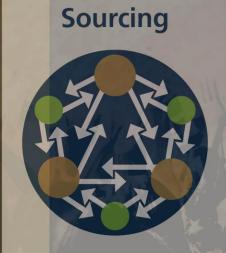
Network Sourcing



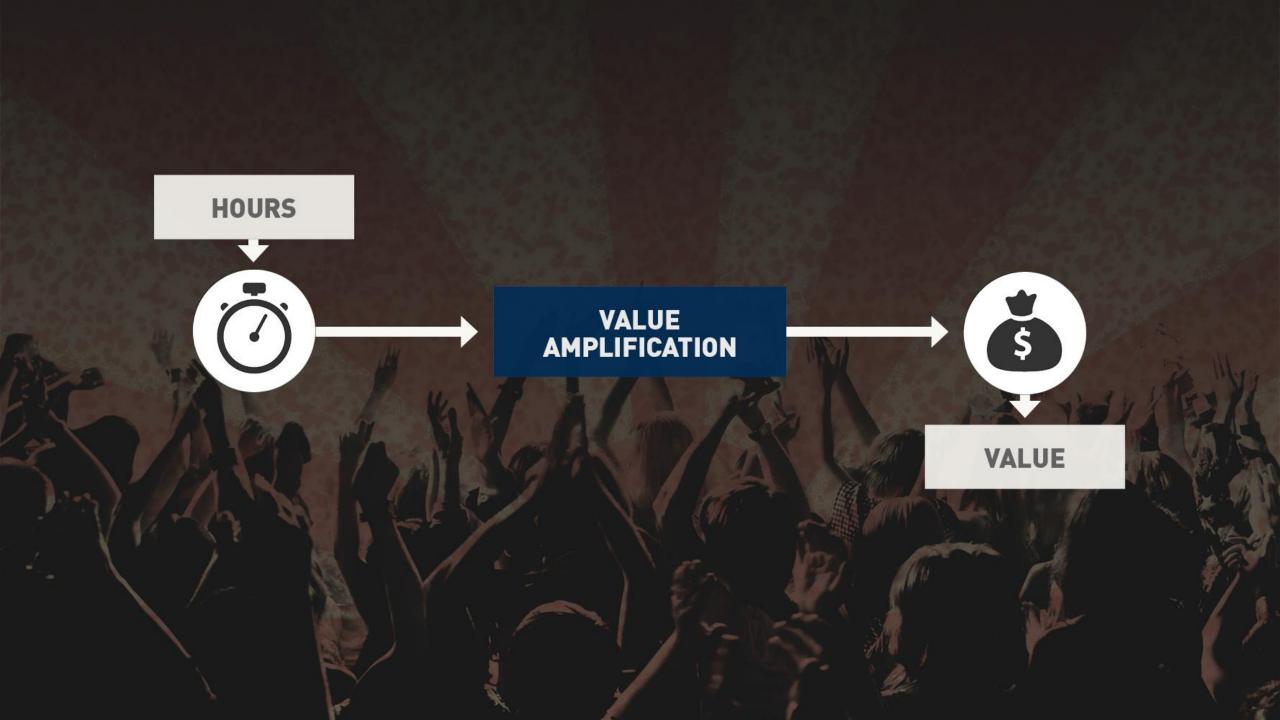
Co-Sourcing

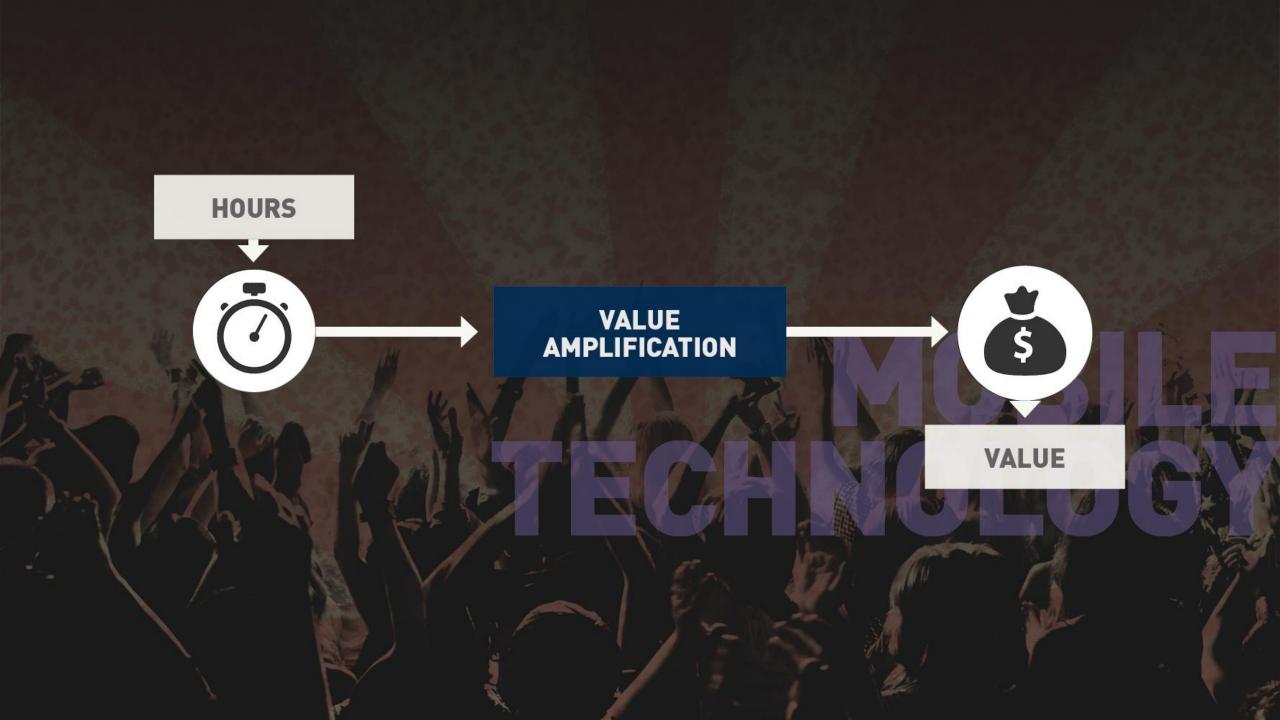


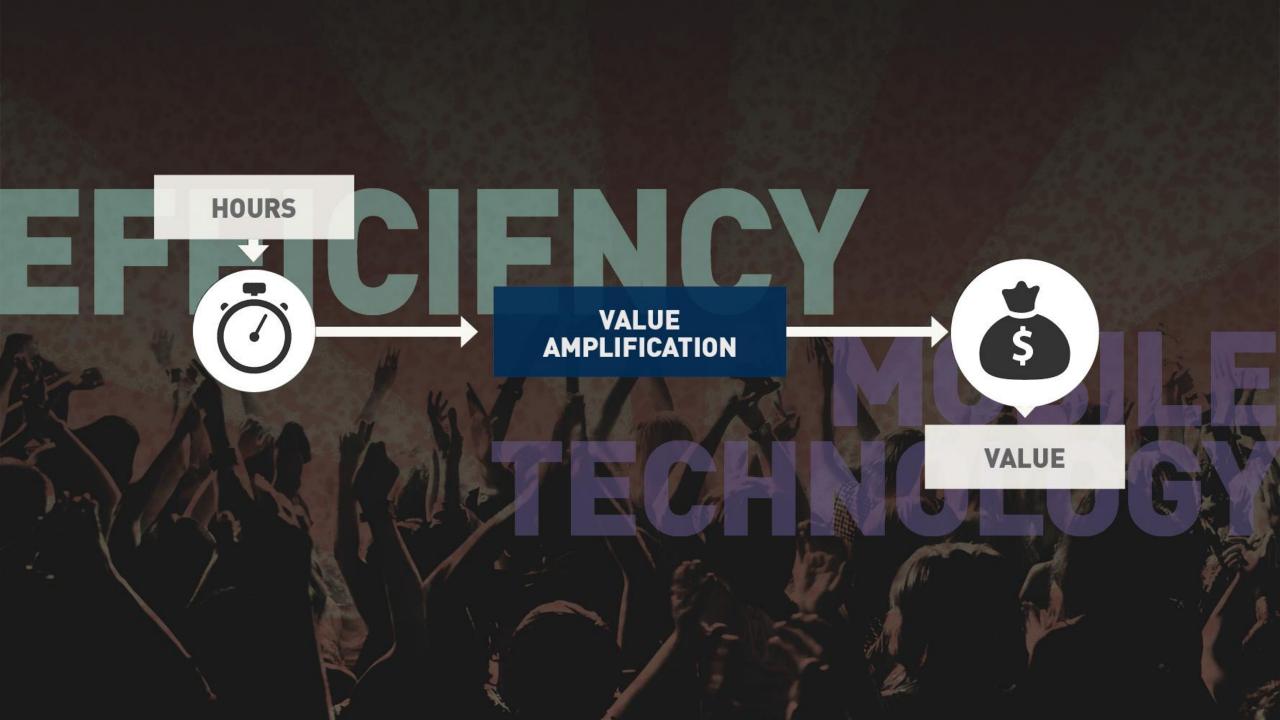
ng Mesh



MORE TRANSACTIONAL

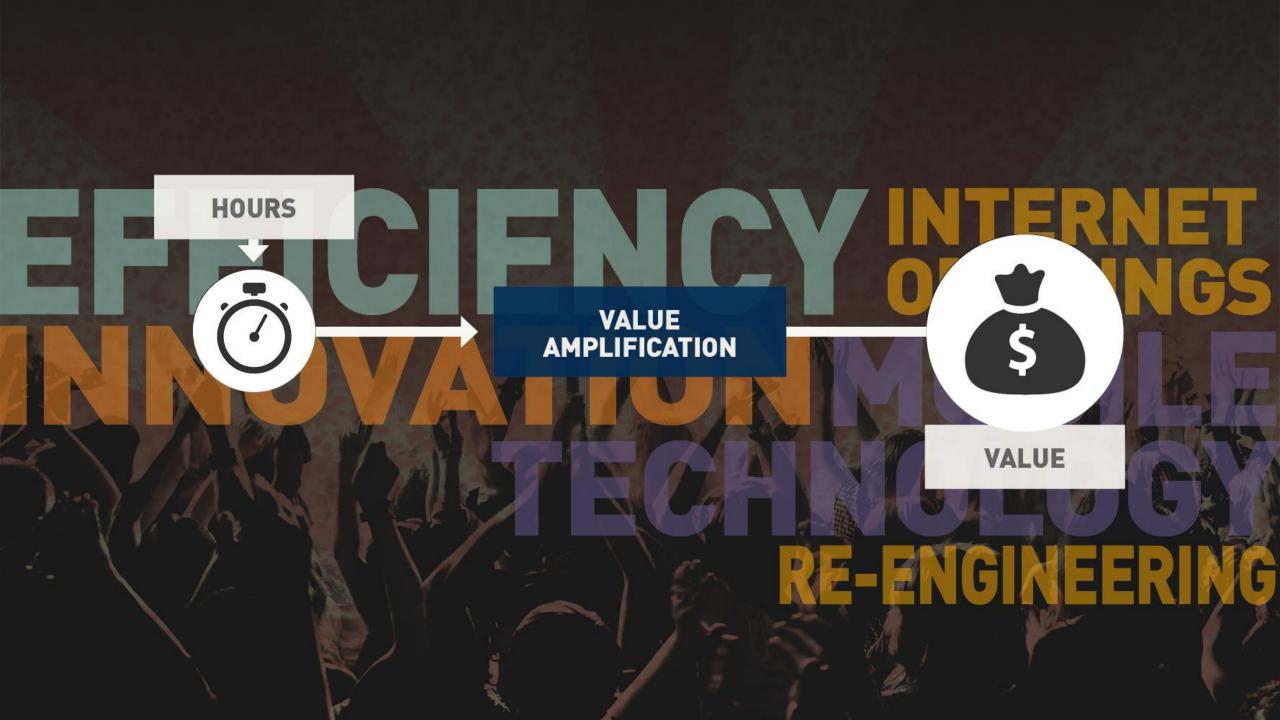










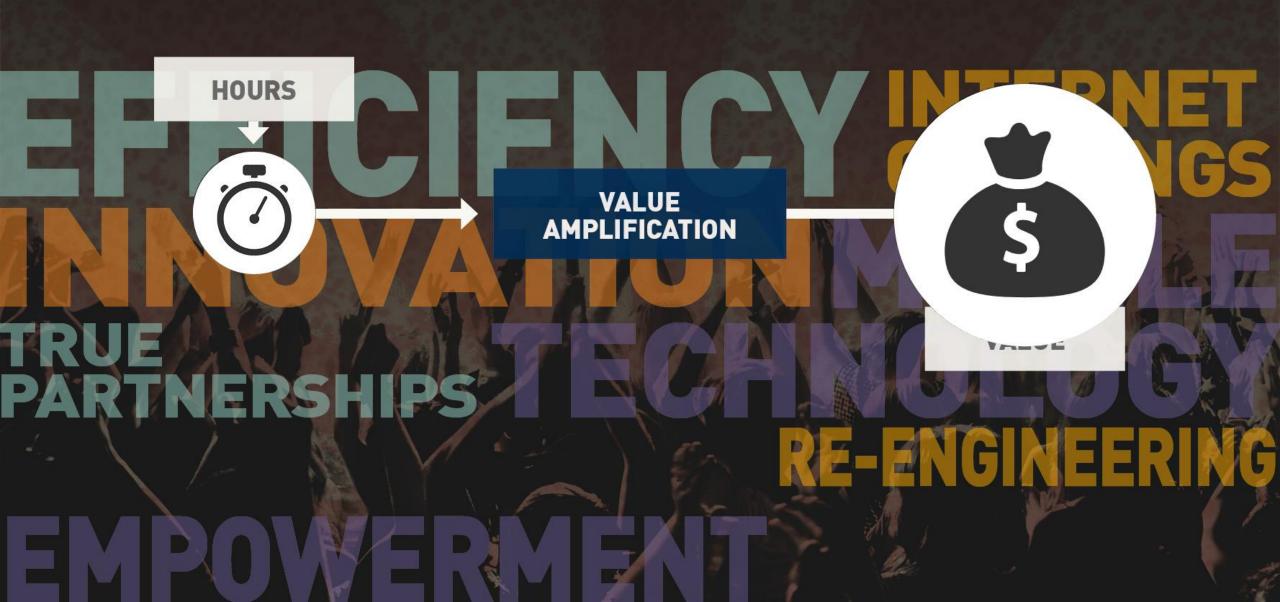




CONTINUOUS IMPROVEMENT HOURS HOURS CONTINUOUS IMPROVEMENT



CONTINUOUS IMPROVEMENT



CONTINUOUS IMPROVEMENT

