



## CHECKLIST: Are You Disaster Ready?

Linda DeTienne, vice president of business development and ISO quality management for NCRI (National Catastrophe Restoration, Inc.) provides an essential checklist that addresses the question: "Are You Disaster-ready?".

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# eurpeanFM insight



## In Brief

### The Future of Property Lies in Services

The important relationship between Property Services and Facility Management has become even more apparent during the economic crisis. In order to understand the way in which the property sector is changing and to anticipate the effects these changes might have on the FM market, Mariantonietta Lisena from Gestire interviewed the Chairman of Assoimmobiliare (the Italian Real Estate Industry Association), Gualtiero Tamburini.

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What is the size of the FM market in Europe? Sven Teichmann has adopted a systematic approach in line with a market development model and a range of variables in order to determine the market size of the FM market within Europe.

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## Education

### FM Education in Switzerland: a Research-Based Master's Degree in 2010?

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# Property: From a Restricting Liability to Part of the Business Plan

By François Pinget

**A survey carried out among property managers of French industrial and service companies highlights several key points, including a significant change in the status of corporate real estate. Traditionally seen as a constraint, property is increasingly seen as an integral part of companies' business plans - sometimes even becoming a catalyst.**



Property is the second or third business expenditure category after staff and IT. As a consequence, it tends to be the focus of much attention and a regular source of financial, organizational and functional concern. The interviews carried out in 2008 as part of the survey of property managers of industrial and services groups confirmed that property does not, in fact, always enjoy a good reputation: it can appear to be a rather secondary item and be seen as a restricting liability. However, we are increasingly seeing that this expense can be transformed into a strategic asset within the company's business plan. Where this is the case, the role of the property manager increases in importance and legitimacy - provided that he or she has a strong, direct link

with central management.

## Seven Main Organization Modes

There is no standard profile for property management departments - and certainly not in each of the sectors researched. Taking a "cut and paste" approach can be risky. In all sectors, practices can be divided into three main categories of organization that operate under several different modes.

The first of these is the simplest: no property management across the group. This is seen in mutual and cooperative organizations and in the numerous industrial or services groups that have independent subsidiaries. Typically, in this category we find companies like Crédit Agricole, Caisses d'Épargne, Lagardère, Vinci and so on.

In the second mode, property management is centralized, but with no ownership responsibilities. Four

approaches can be identified:

- Decentralized management, where historical and cultural constraints are often the decisive factors: Bolloré, Capgemini, Veolia...
- A "compact" management team working only on major projects, driven by control and profitability: Alcatel-Lucent, Ineo Endel, Danone, Alstom...
- An integrated management approach - mostly due to historical importance and a desire for end-to-end control: GE, Rexel, France Télécom, Société Générale, BNP Paribas...
- Asset outsourcing dictated by financial constraints or strategy: Thales, ABN Amro, Deutsche Bank...

The third and final mode of organization is a centralized property management department with a specific subsidiary dealing with ownership issues or an integrated holding operating

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## "Bienvenue Arseg Info!!"



Arseg Info is the only French publication entirely dedicated to facilities managers and has been in publication since 1994. Its main purpose is to give a very large overview of the actuality of the profession, strong and up to date information on big issues related to FM, Real Estate, purchasing or services to the occupiers fields and to help spreading best practices.

The Editorial Board of EuroFM are also delighted to welcome **Mr Lionel Cottin** as the Editorial Board member for zone 3 representing all the French speaking countries. Lionel is the general manager of Arseg (Association des Directeurs et Responsables de Services Généraux).

## Flexible and Healthy: Martini Health Design: A Hospital with a Warm, Human Feel

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a direct management on property and leases. In this case, the department can be organized either under the "compact" mode (Schneider, EADS, Colas, Carrefour ...) or under the integrated mode (EDF, Renault...).

These organizational practices are directly influenced by four main factors:

- The importance of property within the company's activities and its financial implications: it may be core (distribution, bank branches), secondary (offices for industry), unique (due to being complex or strategic: e.g. laboratories and R&D) or general purpose (offices for banks and some types of services);
- The constraints, performance and financial objectives of the group: the need for equity or profits plays a decisive role in a company's property policy
- Corporate culture: holding property, a culture for centralization or for decentralization represents historical information that is hard to challenge:
- The property manager's personality and the quality of his or her reporting line.

### From Subsidiarity to Integration

Organizing property functions - financial or asset management, property management (PM), facility management (FM), occupier services, development (investment and works) and so on - is the subject of conflicting trends. On the one hand, there is a trend towards separating out business functions, which are then accommodated at different locations. Consequently, property management activities are limited to the management of assets and/or support for development. The organization mode is "compact" and the principle of subsidiarity prevails - with local management on anything that can be dealt with locally.

On the other hand, we note a trend towards integrating all property functions together. In this case, the company considers that good management entails controlling all property matters.

So on one hand, the property and facility management (PM and FM) is often either decentralized out to the sites or even outsourced. An on the other hand, an increase in the power of the purchasing function can lead to the exact opposite situation, with FM functions being re-centralized or brought under control, with site managers sometimes reporting to the central purchasing department.

Thanks to the Internet, interactive property information systems are being developed effectively. Yet 60% of the

companies surveyed either have no centralized system or simply make do with manual - and often partial - consolidation. On this issue, advocates and sceptics stake out their positions as well.

Finally, two practices seen in a minority of cases inspire admiration or wariness: integrating occupier services under property management and the attractive proposition of converting internal resources into profit centres that can be marketed outside the company. These methods are used successfully not just by private service companies but also by public companies (for example, property management centres, developers or housing associations).

The property manager's position in the hierarchy

Property managers are rarely members as such of the executive committee. Broadly speaking, their main role (asset management) means that they report into administration and financial management or corporate affairs.

Less frequently, property management may report in to purchasing, development, human resources or the legal department.

Each sector has its own characteristics

In companies with a predominantly industrial character, property considerations take a back seat and only really come to the fore in a financial crisis or on the CEO's decision. In these companies, there is often a separation between the management of industrial property related to the core business (owned and directly controlled by production management), and management of office buildings (leased and managed by a smaller property management team).

More than in other sectors, the recognition of the business authority of the property manager plays, or has played an important role in the creation and consolidation of the central property function.

In distribution and services, outsourcing assets (or moving them to a subsidiary controlled by shareholders) is a significant trend inasmuch as this strategy promotes investment in capital and the capacity for developing "core" activities. Groups such as Accor, Club Med, Quick, Jardiland and Carrefour have implemented this approach. This strategy has been encouraged by the appetite for property investment funds and the creation of new instruments offering significant tax advantages in a market that has been buoyant in recent years. In this sector, the importance given to the creation and development of sites explains why the property and development functions (prospecting,



administrative procedures, construction supervision and so on) are frequently integrated and there is a close relationship with the logistics and purchasing services, under the authority of the financial affairs director. The transformation of property divisions into outward-looking profit centres can also be seen.

With regard to insurance networks, they operate under specific legal and financial frameworks. Their inability to recover VAT penalizes all rental activities and therefore encourages property holding. Agents and brokers more often than not are autonomous in terms of branch management and property in particular. The company specific agency system almost automatically involves property being owned and managed at a local level. Insurance groups frequently have "property investment management teams" who control all services and play a key role in operational property management.

With regard to the banking networks, even though the picture is (still) patchy, the trend is towards outsourcing and renting. This is because the banks need capital, commercial sites for branches are increasingly offered for rental rather than sale and the banks, in search of top

locations, have no other option.

The focus on a profitable business with a better return on equity is driving total outsourcing. The professionalization of the property function encourages the search for cost-savings and profitability. Finally, the creation of the company's own property holding portfolio usually opens the way to total outsourcing. The potential of transforming these assets into bank products for retail customers is a new, further incentive.

Property supporting the company's business plan

Over the past three years, an increasing number of companies - especially in the services and distribution sectors - have carried out property projects that have been strongly integrated into the company's business plan itself. Implementing this property policy has led to quite significant results (see table). In these strategies, property sometimes even plays a catalytic role within the company's business plan.

In an economically and financially unstable environment, given the remarkable results achieved by these strategies, we expect to see an increase in this type of approach.

	Starting point			Recurring annual savings		Methods implemented
	Starting sites		Budget			
Companies	Quantity	m²			%	
Company A	24 sites	85,000 m²	€30,000,000	50%	€15,000,000	Regrouping into a single site Floor area/ person down from 34 to 13 m²/p
Company B	27 sites	25,000 m²	€12,000,000	35%	€8,000,000	Reorganization Development plan
Company C	5 sites	20,000 m²	€16,000,000	25%	€4,000,000	Regrouping into a single site 95% of open space
Company D	3 sites	30,000 m²	€12,000,000	50%	€6,000,000	80% of open space More efficient building
Company E	2 sites	10,000 m²	€4,500,000	29%	€1,300,000	95% of open space More efficient building
Average	12 sites	34,000 m²	€15,000,000	46%	€6,900,000	

NB: 62 companies analyzed

This study published in 2008 by AOS Studley was conducted in France with property managers of industrial and services companies. The results are based on over sixty interviews and a total of 62 companies were analyzed: 23 are from industrial groups, 24 are in distribution and services groups, and 15 are in banking and insurance.





# FM Education in Switzerland: a Research-Based Master's Degree in 2010?

By Prof. Thomas Wehrmüller



**In the next few weeks the Swiss government will decide whether a research-based Master of Science degree in facilities management will be offered in Switzerland or not. If our application is accepted it will be the first program of its kind in Switzerland.**

## Institute of Facility Management IFM

Since 2000, it has been possible in Switzerland to study for a Bachelor of Science degree in facilities management at the Zurich University of Applied Sciences. In Switzerland, as well as in the Netherlands, the bachelor's degree in FM originates from applied household sciences. 200 students are totally enrolled in the bachelor degree course and the number of students is in fact still increasing. The Institute of Facility Management is part of the Department of Life Science and Facility Management and is located in Wädenswil and in the city of Zurich. The Institute has a broad mandate to provide teaching, research and development, consultancy service and continuous education.

In terms of continuous education, the university already offers a part-time Master of Advanced Studies (MAS) degree, which is assigned to around 15 students each year. This MAS is primarily aimed for graduates from other disciplines than facilities management.

The staff of the institute consists of over 30 people, including 5 professors and 13 assistant and associate professors that teach and do research at full-time at the Institute of Facility Management. Since 2009 the staff has been organised into three groups which has the group leaders: Susanne Hofer, Head of the Hospitality Management Group, Dr Stefan Jäschke, Head of the Real Estate Management Group, and Prof. Lukas Windlinger, Head of the Business Economics and Human Resources Group.

## The campaign for a master's degree

Since 2008 the Universities of Applied Sciences in Switzerland have the legal right to offer a consecutive research-based master's degree. The process, however, for obtaining approval for a master's degree is quite arduous.

In order to obtain the right to offer a master's degree in FM we had firstly to convince the Executive Board of Zurich University of Applied Sciences, and then the authorities of the canton of Zurich. Having passed several instances the Swiss government, at the present time, is examining the petition.

The first questions that we had to deal with for the application were: Is there a

need for a research-based master's in facilities management? Is facilities management a subject of scientific research? These questions could be answered in the affirmative. The Swiss government is now asking the question: Is the research good enough for a master's degree?

## Research-based and practice-oriented master's degree

The programme, which will have an international character, will enable students to perform practice-oriented research. The master's qualification will prepare graduates for demanding positions in FM in a wide variety of industries. They will be trained to deal with strategic issues at upper managerial level.

The MSc in FM of three semesters will be a research-based, consecutive master's degree building on the basis provided by the bachelor's degree in FM. The program, which is developed mainly by Dr Paul Dettwiler, Irene Arnold and Prof. Markus Hubbuch, is to a considerable extent practical and project-oriented and will promote interdisciplinary and integrated thinking in FM. The first semester has the weight on skills in providing services and the profession of FM whereas the second has focus on developing skills in capturing the complexity of needs of primary businesses from different industry sectors.

## A master's degree programme with an international outlook, taught in English

For the Institute, it is important to participate in the international community of FM. For this reason, an increasing number of lecturers from Zurich and abroad are collaborating on international projects. International experts with research experience in construction projects are involved in the master's programme: Prof. Keith Alexander from Manchester, Prof. Michael May from Berlin, and Prof. Hans Rudolf Schalcher from the ETH Zurich are supporting the development of research. They are taking part of the project team and will also have teaching duties in the programme.

The classes in the master's programme will primarily be offered in English. We estimate that about 10 of the 30 master's students will have an international background.

## Research strategy

In its strategy, the Institute of Facility Management is focusing on the following areas:

The IFM's research fields are divided into two levels.

The higher level will deal with the key interdisciplinary areas of FM:

- **Knowledge + Behaviour:** this area relates to the use of knowledge, information and data in FM or in FM organisations and to the leadership and management of FM organisations
- **Strategy, Models, Concepts:** in this area, high-level integrated concepts, models and strategies in facilities management will be addressed in practice-oriented research and development.

The goal of practice-oriented research and development at this level is to develop practical and economically, environmentally and socially sustainable FM strategies and models, and the corresponding processes. As part of the ZHAW FM model (the "Wädenswil model"), these models represent the integration of individual research and development projects and will be subject to continuous development.

In a close interrelationship with the higher level, following areas will be addressed at the level of facility processes:

- **Energy Management:** the management of all forms of energy in the planning, construction, operation and maintenance of buildings
- **Workplace:** user and usage-oriented planning, preparation and management of workplaces and learning environments
- **FM in Healthcare:** FM approaches



*Overlooking the campus of the School of Life Sciences and Facility Management, Zurich University of Applied Sciences*

which meet the particular challenges of the healthcare sector

- **Consumer FM:** development of FM products and services which meet the needs of (private) households.

The findings from practice-oriented research and development at the level of facility processes will provide the basis for the further development and validation of the material at the higher level (Knowledge + Behaviour and Strategy, Models, Concepts).

We are certain that this strategy will allow us to make a significant contribution to the society as a whole and to the accumulation of knowledge in facilities management. It remains for us to convince the politicians that it will be beneficial from multiple aspects if a number of master's degree students have learned to generate new knowledge and discoveries in FM.

Prof. Thomas Wehrmüller, Director of the Institute of Facility Management, Zurich University of Applied Sciences.

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Profile Master of Science in Facility Management	1. Semester ECTS	2. Semester ECTS	3. Semester ECTS	
<b>Scientific methods</b>				<b>21</b>
Scientific theory and methods I and II	5	4		
FM methodology	4			
Project management and Systems Engineering		4		
Leadership and Change Management in FM		4		
<b>FM processes</b>				<b>21</b>
Introduction course: research based MSc in FM	4			
Aspects of Real Estate Management in FM	4			
Service Management with respect to FM	4			
FM related to Space and Infrastructure	4			
Case study I - research project I	5		7	
<b>FM clients and core business</b>				<b>12</b>
External influences on FM		4		
Internal influences on FM		4		
Case study II - research project II		4		
<b>International FM and specific FM Aspects</b>				<b>6</b>
International FM Models			4	
Required electives			2	
Sector-specific FM (industry, tourism, health care..)				
FM Aspects in Public Real Estate Management				
Energy Management				
Hospitality Management				
Consumer FM				
<b>Master-Thesis</b>		6	24	<b>30</b>
	30	30	30	90

*Figure: planned course structure from 2010 onwards*

# The Future of Property Lies in Services

By **Mariantonietta Lisena**  
From: *Gestire*, December 2008

**The Chairman of Assoimmobiliare (the Italian Real Estate Industry Association), Gualtiero Tamburini, is looking beyond the crisis that has hit the sector. "The problems have started to appear after ten years of growth. But the sector will keep growing as it has in the past, thanks to the externalisation of property-related activities".**

The property sector and Facilities Management are two worlds that are inexorably drawn to influence one another, to communicate among themselves and ultimately work with each other. This becomes even more evident at times like these: the property market seems to have reached saturation point, and people are being forced to make their offers more lucrative. From this point of view, the best road to follow would seem to be that of constructing buildings which are easy and cheap to run, so as to attract a higher number of potential buyers. In other words, buildings constructed according to the principles of Facilities Management.

In order to understand the way in which the property sector is changing and to anticipate the effects these

changes might have on the FM market, we interviewed the Chairman of Assoimmobiliare (the Italian Real Estate Industry Association), Gualtiero Tamburini.

## What is the current situation in the property sector?

After a decade in which property values have risen sharply across the globe, the property sector now has to face a difficult period, although the scale of the problem varies from country to country.

The slowdown had been predicted for some time, but accelerated sharply because of the subprime crisis that took hold in the USA during the first half of 2007. In Italy - unlike in the United States, the United Kingdom and Spain -

the current weak economic situation is being felt more in terms of buying and selling, rather than prices.

Italy's lower level of household and business debt compared to other countries is acting as a kind of cushion that is protecting us from undesirable aftershocks.

## What challenges does the property sector face in the immediate future?

The last decade has been seen as an opportunity - which we haven't fully grasped - to launch major reforms in the sector. Despite that, we must mention the great progress made by the Italian property sector, particularly when it comes to transparency - this is something that has also been acknowledged by influential foreign observers. In the future, as in the past, Italy's property market will continue to grow in terms of employment and added value (there are now thought to be around 400,000 people employed in property services, whereas in 1991 this figure was just over 85,000) in an environment that is becoming increasingly global and showing signs of converging with the more evolved markets.

**What steps do you believe should be taken in order to consolidate the partnership between the property sector and the world of Facilities Management? What are the potential**

## benefits of this collaboration for all the parties involved?

To a great extent, Facilities Management consists of services "to" property which are increasingly becoming integrated with services "in" property. It is a sector with natural links to other areas such as real estate, finance, investment, development, planning and so on. Taken together, these services represent an area with growing value for the construction and property industry, and are growing at an even faster rate than the tertiary sector of which they form part. As in the past, the basic driver behind the growth of the Facilities Management market will continue to be the general trend for companies to make a decisive move towards outsourcing non-core business. However, it should be emphasised that this same driver will also give a definite push to the development of property services as a whole. All this will be possible because the ways in which value is created today are increasingly associated with intangible activities - services - rather than tangible ones such as construction. As regards society and therefore also policy makers, the challenge that the property sector will have to face in order to grow arm in arm with the needs of the economy is that of successfully managing to perceive and interpret the virtuous role of services.



## TWO NEW BOOKS ON FACILITIES MANAGEMENT

The Centre for Facilities Management - Realdania Research at the Technical University of Denmark has published two books, which are aimed both for students and practitioners. Read more about the books at the bookshop on [www.eurofm.org](http://www.eurofm.org) or at [www.cfm.dtu.dk](http://www.cfm.dtu.dk). Both books are reviewed in the scientific journal *Facilities* in 2009 (issue 1/2 and 9/10). Order: [http://www.polyteknisk.dk/home/Facilities\\_management](http://www.polyteknisk.dk/home/Facilities_management). Teaching institutions: [http://www.polyteknisk.dk/home/Facilities\\_management\\_student](http://www.polyteknisk.dk/home/Facilities_management_student).

### Facilities Management for Students and Practitioners

The book is written by professor Per Anker Jensen and offers a coherent and comprehensive introduction to the relatively new professional discipline called Facilities Management. It can be used as a basic textbook for students at higher education and is also a useful reference book for practitioners within the field of FM.

ISBN: 978-87-90855-14-7  
(soft back, 212 pp.)  
Price: DKK 625 - approx. € 83  
- and costs of postage  
(for teaching institutions  
DKK 225 - approx. € 30  
- and costs of postage)



### Facilities Management Best Practice in the Nordic Countries - 36 Cases

This book is based on a research project led by professor Per Anker Jensen, who is also the main author. It includes 36 different cases of Facilities Management from the Nordic countries - Denmark, Norway, Sweden, Finland and Iceland. It is not a text book, but it includes a number of specific examples from the real world.

ISBN: 978-87-90855-07-9  
(soft back, 300 pp.)  
Price: DKK 375 - approx. € 50  
- and costs of postage  
(for teaching institutions  
DKK 125 - approx. € 17  
- and costs of postage)





# FM Market Size in Europe

By Sven A. Teichmann MBE

**The total size of the European FM market is difficult to quantify. However, a systematic assessment is possible on the basis of a market development model and by using varying parameters.**

Despite the huge demand for (FM) services in the context of adjusting value chains in many companies and industry sectors, the actual knowledge of the not easily quantifiable size of the European FM market is comparatively modest. For example, already in the year 2005, the size of the Facilities Management market in the five European countries with the strongest economies (UK, Germany, France, Italy and Spain) was estimated at almost 218 billion euros, this survey only taking into account external services [1]. For Germany alone, a range of differing information on the size of the Facilities Management market can be found in leading studies by renowned market research and consulting companies. The total size is estimated at between 40 and 55 billion euros [2]. Consequently, the size of the European FM market will probably be in the order of several hundred billion euros.

Even though many market surveys on Facilities Management provide information about the market size in individual countries, there is, however, no systematic and pan-European market model in place, which is based on standardized reference parameters. The underlying problem here is the fact that the different market size figures cannot be compared in an objective manner, partly as a result of insufficient differentiation between internal and external services, imprecise definition

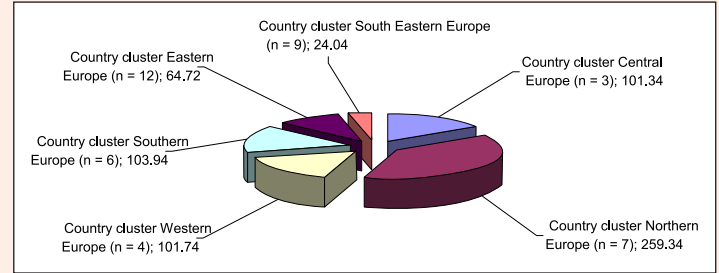
and scoping of the products and service areas [3] considered, and partly due to non-transparency and differences as regards the underlying methodology and the length of the data collection periods. In light of the above and taking into account the incomplete data base for the European market, among other things, the question about the actual size of the market for FM services in Europe was explored in the context of an international research project supervised by Professor Dr. Karl-Werner Schulte HonRICS CRE at the International Real Estate Business School of the University of Regensburg.

## Calculation of the market size

From above, it could be concluded that the size of the European FM market cannot be determined exactly by the business practice or the research community. Yet, a systematic approach to these is to take place on the basis of a general market development model with characteristic market types and the use of different parameters. The aim of this study was to obtain data on the total expenditure on FM services as well as the ratio between internal and external services.

## Pre-emerging and pioneer markets

In an international market structure analysis of the FM sector from a previous empirical study, numerous renowned European companies provided an assessment of the



*Distribution of the calculated FM market size in different countries*

development of structural competitive forces in accordance with the five forces model by Michael E. Porter. The analysis covered a total of 41 countries: 27 members of the European Union and an additional 14 countries for comparison. Moreover, geographical market segmentation into six country clusters was carried out: Central, Northern, Western, Southern, Eastern and South Eastern Europe [4].

After the country-wise data collection and evaluation and the subsequent transnational data concentration, the comparison between countries leads to the conclusion that in the European Facilities Management market a clear development is taking place with four main phases and characteristic market types, which the individual countries follow in the same or in a similar fashion despite national peculiarities.

According to the general market development model, individual markets usually start up as not yet developed "pre-emerging markets", continue as "emerging markets" and "developed markets" to finally be part of the most developed "pioneer markets".

In the above model, the development of regional markets in Facilities Management from a particular phase or market type to another is merely time shifted. Over time, the different European countries, with their present market maturity, have been allocated to individual market types on the basis of different criteria such as the development of specific supplier and product types. In a market development model, these market types can be characterized in a systematic manner by way of relevant competitive forces [5].

## Correlation to the GDP

The most important methodical steps, a small number of selected parameters, and key results of a simplified determination of the size of the Facilities Management market in the European countries are presented below. For this calculation, two essential questions are important: First, what are the relevant parameters for a country-wise, systematic determination of the size of the Facilities Management market, and, second, what characteristics and assumptions with respect to reference values are suitable? The research project focuses on four key parameters:

- Correlation to the gross domestic product (GDP) at market prices (in euros)
- Market types (classification in types in accordance with market development model)

- Degree of outsourcing for different market types (percent)
- Growth rates for different market types (percent)

The first step is to take the GDP at market prices in each individual country, since this figure is an important market parameter that correlates with the total expenditure in Facilities Management [6]. In order to get a first indication of the total expenditure in Facilities Management, the aforementioned data for the European Top 5, which quantify the FM market size with respect to external services for the year 2005 were used [7]. For the Top 5 countries, this market's share of the GDP in 2005 was on average 2.48 %, while, in the same year, the FM market's share of the GDP as regards external and internal services was on average 4.92 %. These two references make it possible to calculate the size of the FM market in individual countries if we assume the same correlation to the GDP.

The next step was to conduct expert interviews with three representatives of renowned and internationally active market research and consulting companies, in which they were asked to provide an estimate of the degree of outsourcing in the Top 5 countries as well as the degree of outsourcing and growth rates of external services between 2005 and 2008 for the defined market types as a basic indicator of maturity (see Table 1).

In order to achieve the highest possible accuracy, the following calculations use the average estimated degrees of outsourcing of the Top 5 as a basis. For all the remaining countries, the average estimated degree of outsourcing and growth rates are related to the market types to which the individual European countries have already been assigned. In this way it was possible to determine the ratio between internal and external services. Finally, we took into account the development of external services from 2005 to 2008 by way of estimated growth rates of the FM market size.

## Total volume of 655 billion euros

This simplified calculation resulted in a total size of the European FM market of approx. 655 billion euros in 2008, with approx. 331 billion euros going to internal services and approx. 324 billion euros to external services. Of the total volume, approx. 422 billion euros can be attributed to the Top 5 countries alone, with internal services accounting for approx. 190 billion euros and external services for approx. 232 billion euros. Table 2 lists the size of the Facilities

*continues on page 6*

Market (development) model Estimate of degree of outsourcing and growth rates of external services for different market types in the market development model		
Countries / Market types	Mean values of expert estimates (n = 3)	
Estimate of degree of outsourcing in the European TOP 5 countries	[%]	Ranking
United Kingdom (UK)	59.2	1
Germany (DE)	47.7	2
France (FR)	45.0	3
Italy (IT)	41.0	4
Spain (ES)	40.2	5
Estimate of degree of outsourcing in the market types	[%]	Ranking
Pre-Emerging Markets	17.5	4
Emerging Markets	32.5	3
Developed Markets	43.6	2
Pioneer Markets	56.3	1
Estimate of growth rates of external services from 2005 to 2008 in the market types	[%]	Ranking
Pre-Emerging Markets	21.5	1
Emerging Markets	12.3	2
Developed Markets	8.0	3
Pioneer Markets	6.0	4

*Table 1: Expert estimate of the degree of outsourcing and growth rates in FM*



## FM Market Size in Europe

continued from page 5

Management markets of the individual European countries as calculated using this method. The results of the calculation were evaluated and checked for consistency against market sizes of different countries available from various market studies (see Table 2).

If we finally examine the distribution of the FM market size in the year 2008 with regards to internal and external services, e.g. across the previously defined clusters of European countries, we obtain the following picture (see Fig. 1).

If the different European country clusters were examined (after allocating individual countries to respective clusters), Northern Europe has by far the largest Facilities Management market, with the United Kingdom accounting for the largest share in this market. It is followed by Central, Western and Southern Europe, with very similar market sizes, while Eastern and South Eastern Europe follow at a certain distance. It is interesting to note that this sequence roughly follows that of the market maturity of the individual countries or, on aggregate, the different market types. Furthermore, a north-south-divide with respect to the market size distribution is also evident.

### Conclusion and outlook

In view of the information deficit found with respect to the European FM market and the database of available market studies, characterized by a selective and to some extent inscrutable and inconsistent data collection, this study aims to systematically estimate the size of the Facilities Management market in Europe.

The key parameters used for the country-wise determination of the market size were the correlation to the GDP as well as the degree of outsourcing and growth rates in the respective countries, which, seen as phases of the typical market development, relate to defined market types to which the individual European countries were first allocated. It is possible to increase the detail of the model and, accordingly, the precision of the calculation for determining the size of the Facilities Management market in each country by including further general economic and FM-specific parameters such as, for example, the size and distribution of the economic sectors or the volume and distribution of the assets and facilities.

The study concludes by confirming the enormous demand for and considerable potential of Facilities Management services. The findings can be useful for market participants for obtaining a qualitative view of the maturity of different markets when carrying out a quantitative assessment of the size of the FM market in individual countries or of geographical market segments in Europe.

continues on page 7

Country		Market segmentation		GDP	FM market size 2008 in relation to GDP			Ranking
Country	ID	Country cluster allocation	Market type allocation	GDP at market price 2005 [billion EUR]	Market size FM 2008 external services [billion EUR]	Market size FM 2008 internal services [billion EUR]	Market size FM 2008 FM 2008 internal and external services [billion EUR]	
United Kingdom	UK	Northern Europe	Pioneer Market	1,859.05	128.26	76.13	204.39	1
Germany	DE	Central Europe	Developed Market	2,360.06	37.80	35.58	73.38	2
France	FR	Western Europe	Developed Market	1,795.75	28.62	30.27	58.89	3
Italy	IT	Southern Europe	Developed Market	1,488.29	21.60	27.18	48.78	4
Spain	ES	Southern Europe	Developed Market	949.66	16.20	21.11	37.31	5
Russia	RU	Eastern Europe	Emerging Market	645.55	11.59	20.17	31.76	6
Netherlands	NL	Western Europe	Pioneer Market	527.08	15.48	10.46	25.93	7
Belgium	BE	Western Europe	Developed Market	313.13	7.25	8.15	15.41	8
Switzerland	CH	Central Europe	Developed Market	309.92	7.18	8.07	15.25	9
Turkey	TR	South Eastern Europe	Pre-Emerging Market	306.83	3.21	11.89	15.10	10
Sweden	SE	Northern Europe	Emerging Market	302.03	5.42	9.44	14.86	11
Austria	AT	Central Europe	Developed Market	258.45	5.99	6.73	12.72	12
Poland	PL	Eastern Europe	Emerging Market	255.99	4.60	8.00	12.59	13
Norway	NO	Northern Europe	Emerging Market	249.53	4.48	7.80	12.28	14
Denmark	DK	Northern Europe	Developed Market	218.46	5.06	5.69	10.75	15
Greece	GR	Southern Europe	Pre-Emerging Market	190.17	1.99	7.37	9.36	16
Ireland	IE	Northern Europe	Developed Market	170.42	3.95	4.44	8.38	17
Finland	FI	Northern Europe	Emerging Market	163.11	2.93	5.10	8.02	18
Portugal	PT	Southern Europe	Emerging Market	154.78	2.78	4.84	7.62	19
Czech Republic	CZ	Eastern Europe	Emerging Market	104.69	1.88	3.27	5.15	20
Hungary	HU	Eastern Europe	Emerging Market	93.19	1.67	2.91	4.59	21
Rumania	RO	South Eastern Europe	Pre-Emerging Market	83.47	0.87	3.23	4.11	22
Ukraine	UA	Eastern Europe	Pre-Emerging Market	72.73	0.76	2.82	3.58	23
Slovakia	SK	Eastern Europe	Emerging Market	40.04	0.72	1.25	1.97	24
Croatia	HR	South Eastern Europe	Pre-Emerging Market	32.84	0.34	1.27	1.62	25
Luxemburg	LU	Western Europe	Developed Market	30.79	0.71	0.80	1.52	26
Slovenia	SI	Eastern Europe	Emerging Market	29.01	0.52	0.91	1.43	27
Belarus	BY	Eastern Europe	Pre-Emerging Market	24.97	0.26	0.97	1.23	28
Bulgaria	BG	South Eastern Europe	Emerging Market	22.96	0.41	0.72	1.13	29
Lithuania	LT	Eastern Europe	Pre-Emerging Market	21.66	0.23	0.84	1.07	30
Serbia	RS	South Eastern Europe	Pre-Emerging Market	20.40	0.21	0.79	1.00	31
Latvia	LV	Eastern Europe	Pre-Emerging Market	13.55	0.14	0.52	0.67	32
Iceland	IS	Northern Europe	Emerging Market	13.35	0.24	0.42	0.66	33
Cyprus	CY	Southern Europe	Pre-Emerging Market	13.02	0.14	0.50	0.64	34
Estonia	EE	Eastern Europe	Pre-Emerging Market	11.61	0.12	0.45	0.57	35
Bosnia & Herzegovina	BA	South Eastern Europe	Pre-Emerging Market	8.38	0.09	0.32	0.41	36
Albania	AL	South Eastern Europe	Pre-Emerging Market	7.08	0.07	0.27	0.35	37
Macedonia	MK	South Eastern Europe	Pre-Emerging Market	4.87	0.05	0.19	0.24	38
Malta	MT	Southern Europe	Pre-Emerging Market	4.70	0.05	0.18	0.23	39
Moldova. Republic of	MD	Eastern Europe	Pre-Emerging Market	2.52	0.03	0.10	0.12	40
Montenegro	Unit	South Eastern Europe	Pre-Emerging Market	1.77	0.03	0.07	0.09	41
Europe TOP 5: Total					232.48	190.27	422.75	Σ
Europe total (n=41)					323.93	331.19	655.13	Σ

Table 2: Calculated FM market size in individual European country clusters

## FM Market Size in Europe

continued from page 6



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RESEARCH

# EFMC 2009: Will an FM Action Agenda Succeed?

By Wim Pullen

## Why an Action Agenda?

One of the aims of EFMC 2009 was to contribute to the development of a long term Action Agenda for FM. This is based on the belief that joint effort based on FM practice and research is required to improve a business; for the sake of the organization, the people and for society in general. That may be viewed as an ideology: pragmatic and focused.

There were three reasons for bringing that focus to EFMC 2009. First, the feedback from past conferences highlighted the need to join forces; the need to have common objectives to work on and knowledge sharing between practice and research represents progress in FM.

Secondly, Dutch Facility Managers are perceived - or even worse perceive themselves - as reactive, waiting to see what top management will ask of them and focused on internal policies rather than on improving outcomes (Heling 2008). So the big problems of society like energy demand and consumption, demographics at work, business paradigms (business ethics!) are not proactively addressed by FMs.

Thirdly, the world as an ecosystem has been given to us to take care of and look after. That gives us a responsibility to do what we can. The Action Agenda can work as a tool for the FM community to evaluate its activities and subsequently to take steps to lead us towards the future. In addition, EuroFM will be able to use the Action Agenda as a tool in political lobbying in Brussels, which is more than necessary to get political support and research funding for innovating business resources strategies (which should be seen as the focus of research in FM!).

## Content

One of the most striking questions used to sum up the EFMC 2009 conference was: "What are the costs of being cheap?" This question combines everything that matters. Firstly, there is the underlying, predominant paradigm of being cheap, of working with the lowest budget possible in order to achieve the highest profits. Cost is the key indicator. What about choosing 'continuity' as a business's main goal? Being cheap is no problem when sunk costs are omitted from the decision-making process. When it comes to sustainable decisions, we seem to argue that what we don't know about the past or the long term future doesn't matter.

## Key questions

Do we know? Does it matter?

If we apply these six, simple words to the other seven in the question "What are the costs of being cheap?", the most likely answers are "No" and "Yes", respectively. If it matters, we need to take action. Everyone is involved in his or her own domain. Researchers should unlock the best available knowledge. Consultants should sharpen their experience by asking themselves, "Is this the best available knowledge to share with my customer?" And end users should not be satisfied with a solution that just works; they should demand the best available solution!

## Action and coordinated action

The answers to the question in the Action Agenda will also affect The Center for People and Buildings. In our research work for 2010 and beyond, these issues will guide us in our activities. We will do our utmost to promote the Action Agenda in the

Netherlands.

The raison d'être of EuroFM is not merely to organize a yearly conference and have fun (which is a necessary ingredient of human well being!). It is "the advancement of FM knowledge and its application...." (EuroFM website). To report progress in the development and application of knowledge, coordinated action is required.

What action? First, there is the need to evaluate ongoing research in FM. Is it relevant, does it contribute to answering the questions raised by the Action Agenda? Secondly, how can this research be adopted and implemented? Thirdly, there needs to be more integration between research and practice, including joint presentations/papers based on practice and research. There must be plenty of empirical material available throughout

Europe which can be presented from both a business and a research perspective. Lastly, there is the institutional approach. Our Australian colleagues managed to get their Action Agenda adopted by government and put into practice, which boosted the development of FM. Accordingly, the EuroFM Board should build strong relations with the EC and the different bodies of the EU. The Action Agenda could act as a medium for communication.

Will the idea of the Action Agenda succeed? It's up to us!

Wim Pullen, Center for People and Buildings Delft, The Netherlands.

Chair of the Scientific Committee EFMC Research Symposium 2009

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## FM ACTION AGENDA 2015: Do we know? Does it matter?

1. Sustainability, CO2 and energy demand
  - Does increased demand for energy matter to FM?
  - What is the contribution of FM to CO2 emissions?
  - What is the contribution of your company's facilities to CO2 emissions?
  - What can FM do about reducing CO2 emissions?
2. Credit crunch, dominant business paradigms
  - Do the facilities in your organization contribute to:
  - Productivity growth and shareholder value?
  - Productive vitality and business continuity?
  - What can FM contribute to changing the way people think?
3. Demographics
  - Delivery in education, health, services, production: who is there to care?
  - What can FM do to deliver smarter?
  - Develop scenarios to discern what is relevant.
4. Space use, space levels
  - What is the spatial footprint of organizations becoming combinations of networks?
  - What is the socio-economic impact of the use of different levels of space? Cost vs. emotion.
  - What can FM do to raise awareness?
5. Decision making
  - How much does it cost to be cheap?
  - What are the trade-offs in decision-making processes?
  - Social, spatial, environmental.....?



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# Greening the Desert

## Frank Booty on how the booming UAE is greening up

**The progress on building projects in Dubai is mind-boggling. With one in six of the world's cranes in Dubai, 24-hour building activities are everywhere and anywhere you look. The driving force is ruler Sheikh Mohammed Bin Rashid al-Maktoum who oversees a confidence of unbounded depth and optimism in the face of global economic woes and recession. 'Credit woes? What woes?' is a typical comment in the bustling bars, restaurants, malls, traditional souks and hotel foyers.**

Against Dubai's near-maniac economic, infrastructure and demographic upsurge - boasting a GDP growth rate estimated at \$27bn - is the statistic that the United Arab Emirates (UAE) produces more than double the amount of carbon dioxide than the US. The UAE produces 50 tons a year per capita compared with the world average of 4 tons. Car ownership is 541 cars per 1,000 head of population, more than New York, London and Singapore.

So in 2007, the Dubai strategic plan 2015 was announced. The Middle East Centre for Sustainable Development (MECSD) was initiated to assist developers in the region in obtaining green building certification, much like the US Green Building Council's LEED rating system (LEED being the acronym for Leadership in Energy and Environment Design).

As of now, all new buildings in Dubai must conform to ecologically-aware building principles that need to be certified by MECSD. The not-for-profit Emirates Green Building Council (EGBC) was formed in 2006 to instil and advance green building principles to ensure sustainability and protect local environments.

A two-line metro system is under construction - the red line (first phase) will open on September 9, 2009, with the green line scheduled to start on March 21, 2010. Doubtless the plan is to ease the crushing volumes of cars on the roads and get people onto the metro. People waiting for buses (that still have to plough through the congested roads) may be lucky and have one of the air-conditioned bus shelters at their disposal (advertising pays for the cost of these). There will be 43 stations, of which 11 are underground.

Pacific Controls and Tridium have produced the Middle East region's first Platinum level LEED-rated building (see FMX December 08). Both companies are involved in other projects, for instance they monitor the latest Terminal Three airport complex.

Now, Dubai plans another airport - of seven runways and nine terminals, capable of handling 65m people annually by 2050, including dealing

with 125 aircraft at any one time. Dubai is being promoted as a trading hub by its government. Such are the massive changes afoot, if you buy a map of the state today it will most likely be out of date next week.

### Meydan Project & Masdar City

The Meydan project is another eye-opener. In Arabic, Meydan is a word describing a meeting place where people meet to discuss, compete and achieve. This Dubai development comprises four main elements: Meydan racing district, Meydan City, Meydan Business Park and Meydan Godolphin River City.

- The £900m racing district project will include a (massive) 60,000 capacity grandstand, five star hotel overseeing the course, world-class course, galleries, iMAX theatres, conference centre and covered parking for 10,000 cars; a 4km canal will run from Dubai creek and offer a unique opportunity to arrive by boat at the racecourse. Scheduled completion is March 2010.
- Meydan City covers 43m sq. ft. on a land size of some 15m sq. ft. and will comprise commercial and residential plots, retail outlets and arcades with canal, waterfront and promenade views. A marina at the heart of the development will berth 80 leisure yachts. There will be bicycle lanes, tram- lines along roads and parks to encourage 'clean and healthy transport'.
- The business park will feature commercial, retail and residential mix, plus town club and hotel. Over 2.9m square feet of office space in 17 blocks is planned - the first phase is sold to Amlak, a mortgage broker, for £500m.
- The river city development has the river at the eastern entry flowing beneath the Godolphin Gateway Tower, a 40-storey edifice with the image of a thoroughbred horse's head outlined across its façade. A mixed-use linear anchor mall is to stretch 1.4km along the Godolphin riverfront.

Pacific Controls is using Tridium's

Niagara Framework technology to create a converged information and integration infrastructure for building services at Meydan Racing City - and the aim is to extend this infrastructure city-wide as the project progresses. The objective is to unlock the potential of different technology products and make them work together to create a unique ecosystem, say Meydan's developers.

The buildings are designed to be energy aware - i.e. different metering systems within the buildings will be able to register their consumption levels into back-end financial systems to register utility consumption (for example) and then provide tenants with an insight into individual usage patterns.

All smart building devices for services including HVAC, lighting and electrical services, fire, CCTV, access control, UPS, signage, elevators, energy and utilities will be linked together on the development on a converged IP backbone. This means information can be presented and served up for viewing, access and use over the Internet. This enables there to be a reduction in the number of operators and stations. It brings real integration and interoperability benefits, enabling sophisticated rules to be developed and implemented to run the building, which is controlled on one system. In the event of a fire, for example, actions can be automatically triggered in HVAC, lighting, emergency signage, lifts, and CCTV systems.

As it is a services-oriented infrastructure, the system's data is accessible in real time over the web, which means the building can be managed better, and enabling the implementation of enterprise applications - which adds value to the project. The applications envisaged include alarms and events management, energy analysis, planned maintenance, utility billing, chiller optimisation, monitoring and compliance with regulations, e.g. legionella.

Meanwhile, Masdar City is intended to be the world's first carbon-neutral city when it's completed in 2013, housing 50,000 people close to their workplaces, educational facilities and light industries. There'll be emission-free energy supplies (think solar power), modern ecological architecture with a proven passive energy balance and high-energy efficiency, extensive waste recycling and modern public transport system. The plan is to reduce desalinated water consumption by 80 per cent by using re-purification techniques and domestic waste water for irrigation. The 400m-high Lighthouse Tower at

the Dubai International Financial Centre (DIFC) is planned to cut conventional energy consumption in the building by 65 per cent by utilising solar and wind power.

### Future Prospects

The question is will the global economic woes impact on Dubai, and the UAE? Properties in Dubai Marina saw prices rise from 2005's £120 per square foot to £342 in 2008. Obviously this rapid escalation is moderating. Despite continued buoyant optimism from the top echelon, the word on the street among locals is that people are now beginning to question whether to buy property - and there is rather a lot of real estate. If people and companies do stop buying, the massive growth will experience sharp bumps. No-one at the top seems to be too worried. Maybe they know something we don't.

And as for the status of FM in Dubai, 'changing' is the word on the street - it used to be cost-plus by service delivery companies but now it's moving to a lump sum management approach. To aid this, according to one insider: 'every dog and his uncle are here from an FM provider viewpoint' - that includes JCI, Mitie, Ecovert, Tranfield, Douceman, Multipliex, Dalkia, Emcor, Interserve, Macro - and many more. There are said to be some 80 ex-pat FM's there today, all engaged in monthly FM networking. Interesting.

### Further Information

[www.emiratesgbc.org](http://www.emiratesgbc.org)

[www.mecsd.com/](http://www.mecsd.com/)

### Facts on Dubai

- The UAE is a Middle Eastern federation of seven states situated in the southeast of the Arabian Peninsula in Southwest Asia on the Persian Gulf, bordering Oman and Saudi Arabia. The seven states, or emirates, are Abu Dhabi, Ajman, Dubai, Fujairah, Ras al-Khaimah, Sharjah, and Umm al-Quwain. The UAE is rich in oil and gas.
- Burj Dubai, when finished in 2009, at 818m will be the world's tallest building.
- Nakheel Harbour and Tower will be over 1km high, with 200 floors and 150 lifts; some 30,000 workers will be involved in construction; there will be another 40 towers ranging from 20 to 90 floors, up to 350m tall; there will be 19,000+ residential apartments, 3,500+ hotel rooms and a luxurious 100-room hotel atop Nakheel tower.

# The Future: Working with Generation Y

A well-managed flexible office concept as the basis for the next level...

by Iwan van Eldijk MSc and David Stillebroer MSc

Over the past decade, a technological revolution has opened new ways of communicating. Internet technology makes information available almost instantly and enables global communication. Mobile technology facilitates the use of information and communication on a personal level, allowing people to organise their work outside their traditional workplace, the office. A new generation of knowledge workers demands a new type of employer and a new working environment. Facilities management takes care of this video game Generation Y (born after 1987) by providing a working environment that suits their way of working and their lifestyle, while at the same time being efficient for the organisation itself. This new environment is well adapted to the employee's world and gives them access to work and services around the clock, irrespective of time or location. The new working environment is people-centred and no longer tied to a single office or a nine to five existence, with no need to be stuck in traffic every morning. "My workplace is wherever I am."

The intermediate step: the flexible workspace concept

The debate about the usefulness and necessity of flexible working is old news now. Almost all of today's new offices are based on a flexible workspace concept: they have colourful designs, with groups of workstations, sofas and armchairs being casually arranged over the various areas containing knowledge workers. These new concepts will contribute to more dynamism in the workplace, better communication between departments and a reduction in the floor space required. A whole host of experienced consultants are ready to guide you in this, from the preliminary research right through the selection of the right designer for your desks. The investment per workspace is probably higher, but a smaller floor space contributes to lower expenses in terms of rent and moving costs and to lower CO<sub>2</sub> emissions for buildings, heating and lighting. In addition to a more attractive workplace for the same amount of money, you also get the bonus of a feeling of sustainability and more flexibility in your property.

In our view, however, the flexible workspace concept is only an intermediate step on the road to the future. It is an intermediate form between the traditional way of working and the work environment that will be required for Generation Y. The next step might be a flexible workspace concept in combination with a good home based workplace. But are these intermediate steps a success? In practice, many flexible concepts are only implemented half-heartedly or gradually revert back to the traditional office environment. This is in spite of the quality and experience of the professionals who analyse, plan, design and set up these

workplaces. It sometimes seems that the flexible concept extends no further than a little extra thought being given to this idea during the opening of your new premises and the tours that take place in the month or so afterwards. Is sufficient attention being devoted to the stage in which the benefits really come into their own, the management phase, thus preparing the way to the future?

## An intermediate step that demands attention

The deployment of a flexible workspace concept is directly linked to the objectives of your primary process. The changing world outside requires more flexibility from your organisation, effective and creative staff and a facilities manager who constantly keeps an eye on efficiency and costs. The most brilliant office concept is no good if it is only used for 50% of the time and will, in many cases, ultimately be replaced by a flexible concept with a higher occupancy rate per workspace. The flexible concept, however, is not a showroom with furniture and technology that is set up once, but is something that requires a continuous process of management in order to achieve the envisaged gains. Employees are at the heart of the concept in the management phase.

We believe there are four factors in the management phase that will make your flexible workspace concept a success:

- The workplace is flexible, and so is the way of working
- Active measuring and management
- The concept is actively supported
- The concept continues to adapt

*The workplace is flexible, and so is the way of working*



Flexibility in the workplace means more than just changing the layout of the office. It is a way of thinking and working that seeks to empower employees to make the best possible contribution to the organisation, to manage their personal lives and to reduce running costs over time. The Netherlands has the highest percentage of broadband Internet connections in the world and excellent UMTS and HSDPA coverage. With a simple laptop and data card, employees can work on the organisation's network at any time, whether they're at home, in the office or on the move. The technology is not a problem here, but a lack of trust in employees and in this method of managing often is. The agreed end result is now the criterion of performance rather than a 9 to 5 presence in the office. This requires not only trust and a different form of management but also clear rules about accessibility and set times for meetings and evaluations. Clear rules help employees to work flexibly without undue pressure from management, colleagues or their own uncertainty about their performance outside the four office walls. The benefit to you? A flexible way of working gives employees the opportunity to work in a manner that suits their most productive times and their personal life. Research shows that employees who work flexibly say that this allows them to save (travelling) time and increase their productivity. But a significant reduction in square footage can also be noted as a positive side-effect. Maybe this is the time to discuss hard facts, given that property costs are in the order of €4500 per workspace per year (NFC index 2007) with an average occupancy of 50%, and that 120 large companies have now signed an agreement aimed at

reducing road traffic congestion. Are vacant workspaces and stationary employees a luxury that your organisation can no longer afford?

## Active measuring and management

To achieve the envisaged gains of flexible workplaces and to adapt the concept fit to the changing environment, active measuring and management is required. This is not limited to just performing a project evaluation a year or so after introducing the new concept. In practice, it appears that very little measurement is carried out on flexible workspaces during the management phase. This is odd, given that the workspaces are frequently included in the FMIS for registration and internal charging and that it is often possible to reserve workspaces. With the exception of a few forward-thinking organisations, very little attention is devoted to managing the arrangement of workspaces. Recent research by Prof. Peter Vink (Technical University of Delft / TNO) using smart motion sensors shows that there are definite gains to be achieved here, but that in most organisations there is not enough information at all levels to manage the process adequately.

In order to measure and manage, you need to be easily able to record how workspaces and facilities such as video conferencing and webinars are being used. This can be achieved by having employees reserve their workspaces; using the Regus system, employees can reserve a workspace, a meeting room or possibly even a parking space via the intranet or a touch screen at the entrance to their floor; this can be for an hour, a morning or an afternoon, or for several days. The facilities manager will then be

*continues on page 11*



## The Future: Working with Generation Y

continued from page 10

able to see when peaks occur and take appropriate measures in good time: during busy periods, for instance, the employee could work from home or go to another site. For project teams, combinations of workspaces can be reserved for longer periods. Alternatively, a system can be used in which employees are recognised by workspaces: the employee's login code on the PC, or a smart chip on their pass, allows them to be identified by the workspace. CheckIn, an initiative by KPN, shows how this works in practice. Is an employee sitting at a workspace reserved by one of his colleagues? An e-mail or text message from the FMIS will let him know. Intelligent screens on each floor and mobile Web 2.0 applications allow colleagues to quickly find each other. Facilities managers can then measure the occupancy rate of the workspaces and the hours that they are being used, as well as the popularity of different types of workspace and different floors. They can measure whether employees are actually using workspaces flexibly or are regularly reserving workspaces without being present, or are using video conferencing and webinars as a result of a shortage of rooms. In this way, the concept can be adapted to the changing needs of the organisation and potential savings can

be achieved. In the shorter term, peaks and troughs in capacity can easily be highlighted. This data offers an opportunity for actively managing workspaces by (financially) encouraging their use during off-peak times or by directing employees to free spaces as soon as they enter the building. The trick is to ask the right questions and use them as the basis for transforming the available data into useful management information.

### The concept is actively supported

It is striking that in many organisations that say they want to work flexibly managers appear firmly attached to their own offices. This is also the main reason why in some organisations the concept is only implemented half-heartedly or gradually reverts back to the previous office environment. A successful flexible concept is actively supported by management and by the FM organisation. Not only by using flexible workspaces themselves, but also by adopting a flexible approach to working hours and by staying focused on what is really important: the end result and the core values for which the organisation stands. It is important to send out a clear and consistent message about the new way of working and the benefits to employees and the organisation, backed up by setting a good example in practice. This example emphasises the importance of flexibility in the organisation, something that customers cannot fail to notice. And isn't flexibility one of the things that the changing world

outside is demanding of your organisation?

### The concept continues to adapt

A flexible workspace concept is never finished, it develops with the organisation. Not only because departments make flexible use of the available working environment, but also because new ideas from users can be quickly put into practice. Making small improvements, adapting the available workspaces to how they are actually used, while at the same time introducing innovative elements, keeps the concept fresh and alive. The facilities manager plays a guiding and above all a facilitating role in this for the users. A flexible concept is not an end in itself, but a good starting point for making office space do what it is really meant to do.

### Here comes Generation Y!

Our flexible workspace concepts are an intermediate step towards the working environment that Generation Y will be calling for tomorrow. "My workplace is wherever I am" will be put into practice by a generation of knowledge workers who will spend only 18% of their working time in the office, while the rest will be mobile working (45%) and working from home (36%), and even that will consist of a mixture of work and personal activities. Higher education establishments in the Netherlands offer a good example of this and are an indication, in terms of way of working and layout, of what the office environment will look like in ten years

time. New technology and a greater emphasis on reducing costs and square footage will ensure that this generation has a virtual office: a working environment that you can carry around with you in your laptop and smartphone, but which offers the same services and access as your office today. Given the ageing of the workforce, finding out how to attract and retain this videogame-playing generation is not a choice but a necessity. The flexible workspace concept of today is not the ultimate solution, but an intermediate level on the way to a smart work environment that must be successfully implemented in order to reach the next level. 'Game over' is not an option for your organisation.

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# How to Evaluate Usability?

By Nora Johanne Klungseth & Geir K. Hansen

## Methods for evaluating a building's usability

There are several methods that in various ways measure the condition of a building or the users' satisfaction with the building. These cover specialised and limited aspects of what is defined here as usability and will to a lesser extent be a general expression of how a building functions for a company. Here we will present some methods that can be relevant for assessing a building's usability. When evaluating a building's usability, a combination of approaches is often used:

**Gathering of background material** Factual information about a building or organisation. Important details in relation to the organisation are its purpose, goals and vision and its organisational structure, values and culture. Important details about the building are its drawings and reports about its condition and situation and about its current users and user groups. It is important to document the building's adaptability and flexibility in relation to any requirements for change. It is also important to assess such information over time and look at how the building and the organisation have changed and what has caused the

change.

**Observations and studies over time** focusing on the interaction between the building, users and frameworks.

For example, it is possible to examine the interaction between school buildings and children, between architecture and pedagogy. A survey can be made of where children are at different times during the day and what areas are used for various purposes. This method can reveal whether there are areas that are overloaded, underutilised or are used for purposes completely different than intended.

**Interviews with key persons** in a company will often provide very useful information about the goals, requirements and experiences of usability. It is common to ask in detail about the goals and visions of an organisation, about where we are and where we are going and to ask in detail about the interaction between the building and the organisation in the current situation. Performing interviews with key persons makes major demands on the criteria for selection and for understanding their responses based on their position and situation. As mentioned above, the perception of usability depends on the

"eye of the beholder". For example, what a teacher regards as good and suitable may not be regarded in the same way from the perspective of the students.

It can also be a good idea to interview experts or key figures from other companies regarding their experiences and advice with regard to the choice of concepts and solutions.

It is also important in this context to take into account how these solutions obstruct or support the company's activities.

**Inspections** can be used to gather assessments from both experts and users. Inspections should start with a presentation and end with a discussion and recording of views. The presentation can point out particular areas of interest. Inspections can be carried out in a variety of ways depending on the purpose and requirements. It may be single-issue groups who evaluate specific parts or aspects of the facility, combined groups with participants from different parts of the company or expert groups who evaluate various conditions. All these methods of inspection use a selected route and predetermined places to pause where the participants stop and take notes about their positive and negative impressions and the improvements they would like to see implemented. An important effect of combined groups is the discussions and observations that create an understanding of other users' perspective, about how the building serves different needs and the reasons why the building obstructs or supports the company.

**Questionnaires** are a quantitative method and are often used to gather users' views.

Most large companies use questionnaires to measure levels of satisfaction among users and clients and often focus on health, environment and safety. Questionnaires can also be used as a method of documenting usability and to learn about the extent of various phenomena. The questionnaires can focus on various aspects of interests, e.g. space partition and layout, the use of materials, lighting and colours, interior decoration, general impressions and satisfaction etc. Parts of the questionnaire can be designed so that the users indicate their assessments of a number of polar characteristics, such as comfort - discomfort, accessibility -

inaccessibility etc. By marking the questionnaire, an immediate impression can be communicated about the degree to which the building has the characteristics with which the questionnaire is concerned. A possible problem with questionnaires is tracing who has answered, what is their job and where in the building are they located. In other words, in what context are their responses given. The questionnaire can provide useful additional information in combination with other methods.

## A building's usability is important

The concept of usability focuses on whether a building is effective with regard to productivity and provides the required effectiveness and quality (user satisfaction). A building's usability will always depend on the situation or context and it is up to the company to define the factors that are important for ensuring that the building supports the activities performed and the goals that are set. A focus on usability will be useful in relation to improving existing business/buildings and transferring knowledge to new constructions. In order for the FM organisation to support the core activity, it is necessary for it to be familiar with and understand the company, how it is organised and how the building functions in relation to goals, needs and requirements. The faculty for architecture and fine art, NTNU, has cooperated for many years with SINTEF Byggforsk, international research groups and external companies in relation to R&D regarding methods and tools for defining and evaluating usability. In this regard we see a major potential for the FM organisation to contribute to value creation for the company by focusing on the support functions and the buildings usability.

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# CHECKLIST: Are You Disaster-ready?

By Linda DeTienne, CFM, CFMJ

It's 3 a.m. and the dreaded call comes loudly and without warning. The voice on the other end of the phone is in a panic and announces there has been a water pipe break at your facility. The entire basement is filled with water; vital documents are floating up the stairways; the meeting room where the CEO was to have his quarterly board meeting today is now looking more like the Red Sea. You are the facility manager. What do you do?

A professional facility manager or property owner does not question the possibility of a disaster occurring but asks, "What type of disasters could happen, and when?" Whether it is a natural disaster such as severe storms, floods, hurricanes, tornadoes or earthquakes, or the far more common man-made emergencies which include fire, smoke, pipe burst or chemical spills, a well-prepared manager or owner is ready to handle the types of problems that impact and involve:

- Health and safety of employees and tenants;
- Interruption to business operations;
- Further damage to facility;
- Further damage to furniture and equipment; and
- Future public relations.

Gather your information...before it's too late (subhead)

Now is the time to gather information that will be crucial in the event of an emergency and to ensure that all systems are functioning properly. It is vital to know your employee and tenant population, as well as what equipment exists in your building and how it operates. The following should be easily accessible and updated frequently:

**Communications** - Clear and current listings must be kept of staff and tenants. List home phone numbers, work numbers, pager numbers, cell numbers, etc. Establish a calling chain and priority list.

**Inventories** - Keep current listings of property and equipment, complete with identification and serial numbers. Digital photos and/or videos of property are a valuable addition.

**Staff responsibilities** - Everyone should know ahead of time what they must do in the event of a disaster.

- Identify a building evacuation director and team.
- Specify who is responsible for shutting off electricity, gas, water, etc.
- Assign someone to help disabled persons from the building.
- Have someone responsible for removing computer disks or critical computer information.
- Designate a spokesperson to handle

the media.

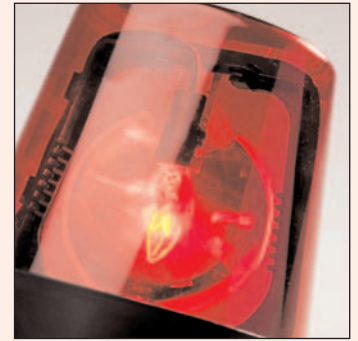
- Identify who will take the emergency procedures manual and move to the designated gathering point to coordinate the flow of people and information.
- Find out who is certified in cardiopulmonary resuscitation and/or first aid.
- Learn if any staff member is fluent in a foreign language or sign language.

**Staff and tenant information** - As difficult as it may be, it is absolutely necessary to have accurate, comprehensive information on staff and tenants. How many individuals are in each suite? How many suites are vacant? Are children in any location? Do you or any tenants store potentially dangerous or flammable materials? Knowing the insurance carrier and agent for each tenant will allow you to more effectively resolve claims on your property.

**Building systems** - Information on the pertinent building systems should be stored in a secure place. This includes data on:

- Sprinkler system - the location of sprinkler heads, how they are activated, whether they are a wet or dry system, who services it and where the shutoffs are.
- Utility shut offs - where the gas, electric and water enters the building and where the control valves are; how to shut each of them off in an emergency.
- Security system - what activates the system, and whether it is tied directly to police and fire departments or if it is separately monitored.
- Smoke evacuation system - the location of fans and controls, and whether they are isolated individually or wired in a series.
- Emergency lighting/generator - their location and how long they will last once activated.

**Blueprints** - These are essential for the fire department in locating mechanical equipment, elevators, stairwells, roof accesses, etc. Store them in a safe location and make sure the print for each floor clearly depicts such things as stand pipe, roof



accesses, shutoffs to water and utilities, emergency generator, etc.

**Keys** - Several sets of keys should be set aside for emergency use. When the fire chief and security staff arrive at the site, they need immediate access to the building and all the spaces within. Be sure to include master keys for the entire building as well as elevator keys.

**Service contractors** - Establish who you will need to contact and list those names and numbers in the information section of your emergency procedures manual. These should include utility companies, plumber, electrician, elevator contractor, heating, ventilation and air conditioning contractor, security firm, security guard services and restoration contractor, among others.

**Insurance information** - You will need your agent/broker name, business and home phone numbers, name of insurance carrier, policy number(s), policy coverage limits and deductibles.

**Evacuation plan** - It is legally required that exits are clearly marked and critical that staff is trained on their locations. Establish a drill and practice it.

**Gathering point or command post** - It is preferable that a gathering point or command post be offsite but close enough to offer a view of your building. Ensure that you have protection from the elements and the ability to establish communications.

**Relocation plan** - For residential properties (or possibly residential tenants), have the phone numbers for service agencies that help in the event of an emergency close at hand. For commercial properties, have the names and phone numbers of local real estate brokers or agents, as well as



the names and numbers of nearby buildings with vacant space. At times, a reciprocal agreement can be made between two businesses of similar size and type to provide temporary backup, operational space following an emergency.

Once your plan is developed, revise and update it regularly. Practice evacuations and emergency situations and conduct practice exercises involving your employees and/or tenants. Maintain current contact information for employees, tenants and vendors/suppliers. Your communication list should also include after-hours numbers for those same contacts.

The key to any successful disaster plan is to put it into practice and keep all information current and readily available when needed.

Establish, approve and communicate the plan

Remember that completing a plan on paper is a significant accomplishment-but it is only half the battle. A plan that is not communicated to your employees, and not practiced and updated periodically, is merely a plan to fail.

Plan for success and full recovery-be prepared.

Linda DeTienne is vice president of business development and ISO quality management for NCRI (National Catastrophe Restoration, Inc.). She serves on the board for the Kansas City and Wichita Chapters of IFMA and is immediate past president of IFMA's Environmental Health and Safety Council. Segments of information for this article were taken from "A Guide to Emergency Planning," a publication which NCRI distributes. For further information or questions, please contact DeTienne at detienne@ncricat.com or at +1-800-598-6274.

The Environmental Health & Safety Council of IFMA is a forum for facility professionals to share ideas and experiences regarding complex issues such as ergonomics, disaster recovery, blood-borne pathogens and asbestos abatement. For more information on the Environmental Health & Safety Council, contact IFMA's council department at councils@ifma.org.



# The Future Looks Brighter for Maintenance of Copenhagen's Buildings

By I B Christensen

**Hundreds of millions of extra DKK for building maintenance should remedy the decay that has particularly affected municipal schools and sports facilities.**

Copenhagen Municipality has a very large backlog in the maintenance of buildings and the same picture emerges in many other municipalities around the country. In the capital, however, politicians have now turned over a new leaf and allocated an extra DKK 800 million over the next three years to correct the mistakes of the past.

"The quite banal reason for this backlog is quite simply that the buildings have not been regularly maintained."

In Copenhagen, the maintenance budget was mixed up with the operations budget within the individual administrations, says head of maintenance in Copenhagen Municipality, Flemming Wulff Hansen.

He explains that a building can be left without spending money on it for several years without anything

significant happening, whereas savings on the operations budget will immediately result in a shortage of books, materials, cleaning etc.

## Backlog Graph

Flemming Wulff Hansen has produced a so-called 'backlog graph' for maintenance in Copenhagen. It shows that the requirement in Copenhagen Municipality amounts to approx. DKK 3 billion.

"If we received that much, I could easily use the entire amount for maintenance, but in comparison, a normal budget is only DKK 200 million annually. That is the amount we have deemed sufficient and set aside in our basic budget, but that assumes that the buildings have been maintained normally."

So, we can't possibly catch up on the backlog with our normal budget. Roofs

and windows need to be replaced" explains Flemming Wulff Hansen.

Copenhagen Municipality's buildings were otherwise in good shape in the 1980's, before the municipality's finances deteriorated.

In the mid-1980's, Copenhagen Municipality ran into major financial difficulties and introduced major cost-cutting measures in all departments. The allocations for maintenance were reduced by half. Flemming Wulff believes that this fits well with the maximum length of time that a building can be left without maintenance before serious decay will manifest itself. He thinks that many building look neglected.

Schools have been worst affected, but social housing for people with disabilities are also in poor condition. On the other hand, kindergartens, nurseries and after-school centres are generally in reasonable condition. Flemming Wulff believes that this is due to the fact that there is more attention given to the physical environment for small children, so there would be an outcry sooner if these institutions were not maintained, in contrast to schools, where many parents seldom visit and where the decay has been allowed to spread.

## Lop-Sided Decentralisation

"It is probably an overall and general tendency that maintenance has not been

taken seriously. "For a number of years there was a tendency to decentralise, and when this was combined with major rounds of savings, maintenance tended to be the target" he says.

Copenhagen's head of maintenance believes that today the future looks bright for the properties. "There is a strong political will to catch up with the backlog."

If the extra funds continue to flow at the same rate as at present, we will soon see a well-maintained building stock and in 10 years time it will have reached a good standard."

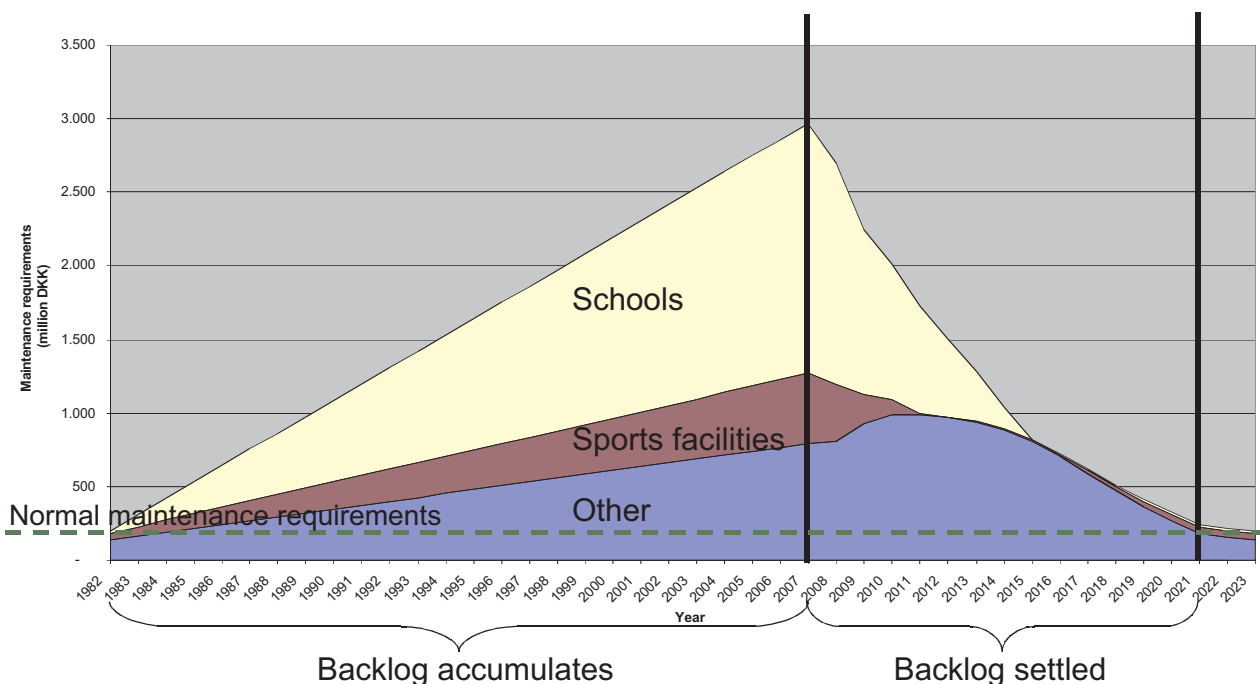
When Flemming Wulff started as head of maintenance in 2007, the budget was DKK 1.3 billion for the period 2007-2009, or about DKK 400 million per annum, an increase of 100% compared to previous years. Schools have been allocated an extra DKK 600 million over the 3 years required to catch up on the most serious deterioration. DKK 280 million has been allocated for sports facilities.

"We prioritise the most neglected buildings first", says Flemming Wulff, "so we have to accept that many buildings will not be in great shape for the next 5-7 years".

The total requirement to cover the backlog in building maintenance in Copenhagen Municipality is estimated at approximately DKK 1.9 billion.

## Composition and processing of the backlog graph Scenario no. 1

The rate of restoration for schools and sports facilities will be maintained after 2009





# Winning Across Borders

Nearly 300 members of the European facility management industry congratulated the winners of the third European FM Awards 2009 in Amsterdam last month, including the Eurest Services and Shell International partnership that won the Partners Across Borders category

**S**INCE THE EUROPEAN FM AWARDS BEGAN THREE YEARS AGO, there has been significant growth of international co-operation and interaction in the facility management sector across Europe. Large corporates such as Shell, Cisco and Merck Sharp & Dohme have taken steps to manage their property estates as a whole rather than country by country. Taking up the challenge to help support their businesses across Europe are their respective partners, Eurest Services, Johnson Controls and Sodexo, all finalists in a hotly contested category in these, the third European FM Awards. There was great anticipation to hear the winners of this category and the European FM Researcher and European FM Student of the Year.

The judges said: *"The Eurest/Shell partnership has transformed FM at Shell from a traditional base to a highly successful and fully fledged European Partnership across borders. They have come a long way in a short space of time showing significant improvement in results and FM delivery. They have also achieved a high degree of integration and a successful alignment. It is clear the core business recognises the value creation and positive contribution to Shell this excellent partnership brings."*

Eurest Services delivers integrated FM

Services to 70 of Shell's offices, refineries, remote gas plants and offshore platforms in the UK, Netherlands, Belgium, France, Poland and the North Sea in a five-year contract. . (This partnership was featured in PFM's April 2009 issue and can be read on [www.pfmmagazine.co.uk](http://www.pfmmagazine.co.uk)). Clearly pleased with their win, the Eurest Services and Shell team celebrated into the night at the Okura Hotel, Amsterdam

The winner of the European FM Student of the Year Award, sponsored by New Directions, was Hanna Koskisto from Finland who has studied at Helsinki University of Technology and is currently studying for an international Masters degree at Hanken School of Economics. The other finalists were Ronald Balvers and Fatima Stitou both of INHolland University

Commenting on the finalists, the judges said: *"During their studies all three candidates undertook international activities such as internships, attending conferences and participating in study field trips abroad. Their academic interests are very broad as can be expected from FM students and concentrate especially on topics such as change management, entrepreneurship and information management. All three students have played leadership roles in their respective student*

(below) Winners of the Partners Across Borders category, the Eurest Services - Shell team (l-r) David Hogland (Global Account Director, Eurest Services), Sandy McNaughton (Operations Performance Leader, Eurest Services) & Sjeng Verjans (Senior Contract Performance Manager, Shell)



(below right, l-r) European FM Researcher finalists Ruud de Haas, winner Nils Gersberg, and Jessica Niemi.

community and are truly ambassadors of their universities. The jury focused on academic achievements, understanding of European FM issues, future aspirations and personality and they decided that the Best European FM student of 2009 is Hanna Koskito from the Helsinki University of Technology."

The winner of the European FM Researcher of the Year 2009 Award sponsored by Facilitec, was Nils Gersberg. With a truly international pedigree, Gersberg is from Germany and he is currently studying at the University of Salford, and is a researcher at Helsinki University of Technology. His research also involves collaboration with Stamford University's Centre of Integrated Facilities Management and the Norwegian University of Science and Technology in Trondheim.

Commenting on his work and contribution of European FM knowledge, the judges said: "Nils Gersberg's research on the relationship between physical and social workplaces has a clear European perspective with outcomes disseminated to academic and practice audiences. The next stage of his research including virtual workplaces, shows a potential for innovation and highly relevant to the advancement of knowledge in modern workplaces."

The other finalists were Ruud de Haas of Wageningen University, Netherlands, and Jessica Niemi of Helsinki University of Technology, Finland.

The European FM Awards are organised by EuroFM, the network of more than 87 organisations in 19 European countries involved in FM practice, education and research. EFMC2009 is its annual conference hosted by a different member organisation each year. This event was supported by the Center for People and Buildings, FMN facility management Nederland, IFMA Holland, Loofd landelijk overleg opleidingen facilitaire dienstverlening,

TU Delft and Wageningen University.

EuroFM chairman, Albert Pilger said: "EuroFM started with the European FM Awards in Zurich at EFMC2007, and in the meantime it is a highly recognized mark of designation all over Europe. On behalf of EuroFM, may I say that we are proud to present such recognition to the FM profession."

The EFMC2009 European FM conference also hosted a poster competition for undergraduate students in FM. A total of 40 entries were received, whittled down by the judges to just 18 created by 35 students from 13 universities in five different universities. Two young Austrians, Arlett Darberkow and Michael Kuhberger created the winning poster entitled 'Generation Renovation' which in the style of a 'Metro map' provided guidelines to facilities managers from planning to fulfillment of renovations projects of their workplace buildings.

The winning students Arlett, Michael and Hannah were also presented with invitations to attend World Workplace 2009 in Orlando in October by Pat Turnbull, chair of the IFMA Foundation.

## Conference debate

Under the theme, *One World, Different Problems – Joint Efforts, Sustainable Solutions*, about 400 FMs from across the European

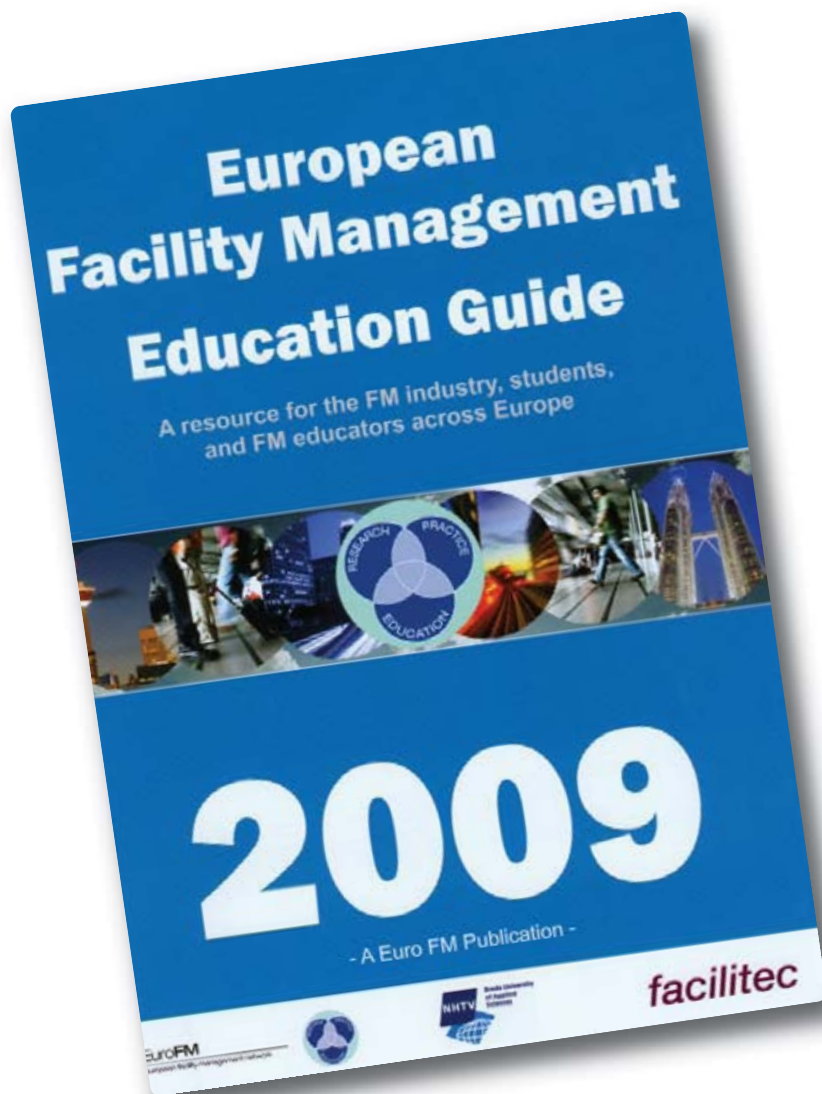
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**(below l-r) on the podium  
European FM Student finalists  
Fatima Stitou, winner Hannah  
Koskito and Ronald Balvers;  
(beneath) Pat Turnbull presenting  
the World Workplace invitation to  
European FM Student of the Year,  
Hannah Koskito**

**(Below l-r) IFMA Foundation chair, Pat Turnbull with student poster winners Arlett Darberkow and Michael Kuhberger;**







**EuroFM's 2009 European FM Education Guide launched at EFMC 2009 includes 62 FM programmes from 50 universities in 15 countries, now available on [www.eurofm.org](http://www.eurofm.org)**

continent heard a number of presentation that focussed on the ever pressing problem of climate change. Amsterdam aims to be carbon neutral in all its municipal buildings by 2015 – in just six years time. The Dutch natural gas resources have peaked and the country will have to import its energy from 2020. The Amsterdam city council is looking into all ways of reducing energy use through to generating energy from its stock of largely historic and mostly inefficient buildings.

Eveline Balogh described how the datacentre of the Austrian expert credit control agency, Österreichische Kontrollbank AG, located in the basement of its HQ building has been transformed by the installation of a watercooled system which directs cooling at the server cubicles and maintains an internal temperature of 32°C inside and 24°C outside. Power supply,

fire extinguishing and retaining the heat generated by the datacentre for heating hot water and offices for a sustainable and much improved resilience.

Director of Facilities at University College London Hospital NHS Trust, Trevor Payne, and Interserve's Director of Carbon Management, Peter Smith described the challenges of improving energy efficiency at the PFI funded hospital whose building technologies are already inefficient and were designed to rely too much on manual controls. It currently uses 18.6m kWh of electricity and 15.2m kWh of natural gas, contributing over 13,000 tonnes of carbon to the atmosphere. The NHS Trust and Interserve have taken a range of measures that have seen savings of 1,200 tonnes of carbon by reducing demand for cooling by 12 percent lighting by 11 percent, and saving 200,000 euros to invest in further energy solutions.

The economic downturn across Europe provided for some wide ranging debate on the role of the FM sector in supporting socially sustainable solutions. Once economies are stabilised, said Professor Keith Alexander of the University of Salford, he suggested that FM should evolve collaborative relationships between users and FMs, that balance social responsibility and enterprise.

The FM Debate of the Year facilitated by Magnus Kuchler, Partner at Ernst & Young, Sweden pitted the opposing views of Leif Mollebjerg, Senior Director of FM at Lego Group, Denmark (claiming that only in-house FM can deliver the service level that the client wants), against Gianmaurizio Cazzarolli, Director of HR and Services at TetraPak, Italy (preferring a hybrid mix of in house and selected bundled outsourced support services) and Walter Verdonk, Senior Sales Consultant at Sodexo Allys (going for total outsourcing of support services). The topic was Save money, stop outsourcing – No it's a crime not to outsource. Kuchler outlined the scene facing FMs of and increasing demand for a wider range of services delivered faster and more orientated to the customer. "The better the FM does the more they demand," he observed. He described the "FM Nirvana" – ideal pro-active FM organisations delivering the services at the right costs in true partnership with suppliers, supporting the core business without contributing the its carbon footprint, employing new technology to deliver services in an individual but standardised way to a happy customer. A lively and controversial debate followed with a range of contributions from the delegates.

Making a first appearance at the EFMC 2009 exhibition geared to supplying FM support services across Europe was IFA – International Facility Alliance SE. The partners in the alliance are all ranked in the top three in their respective countries – Spain, Portugal, Germany, Ireland, Hungary, Bulgaria, Romania, the Netherlands, Belgium, France and the UK. Lead by Facicom Facility Solutions in response to a sharp increase in the number of pan-European calls for tenders, IFA expects these to double this year compared to last year.



## "Not Normal": Facility Management Goes For New Approaches

Report on the EFMC 2009 – The European Facility Management Conference 16th and 17th June 2009, Okura Hotel, Amsterdam, The Netherlands

Written by Albert Pilger and Wayne Tantrum

- FM chances and challenges
- Parameters for sourcing strategies
- Transformation from Facility Manager to Sustainability Manager
- Impact of technology and "productive resignation"

The facility management (FM) industry's ambition for 2015 and beyond is to reverse the supply chain. "The new order will be social - virtual - physical," summarized Wim Pullen (Center for People and Buildings, The Netherlands) and David Martinez (3G-Office, Spain) at the "EFMC - European Facility Management Conference 2009" on 16th and 17th June in Amsterdam. Almost 500 attendees from 40 countries discussed current and future challenges such as sustainability, energy management, demographics, business paradigms and the economic downturn as well as space use and space levels. Most of the delegates came from the Netherlands, Scandinavia, the United Kingdom and German-speaking countries, but there were also FM professionals from Africa, Asia, North

America and down under. Hosted by the International Facility Management Association (IFMA) and the European Facility Management Network (EuroFM), the EFMC featured a Business Conference and Research Symposium integrated into one event. Programme highlights were the vivid and controversial "FM Debate of the Year" on sourcing strategies, the key note speeches by Slovenian Cultural Ambassador Miha Pogacnik and Dutch trend analyst Rob Creemers as well as the European FM Award Ceremony and the Student Poster Session.

Being the chair of the Scientific Committee, Wim Pullen conceptualized three crucial questions with regard to the future FM knowledge demands: "Do we know? Does it matter? And: How much does it cost to be cheap?" Business and research joining forces, plus long-term knowledge investment programmes were the FM knowledge base being placed on the agenda of the EFMC 2010 in Madrid. "The new role of the Facility Manager could be that of a Corporate Sustainability Manager," Pullen stated. David Martinez alluded to the option of a Chief Facility Management Officer (CFMO).

### "FM nirvana" and sourcing strategies

Magnus Kuchler (Ernst & Young, Sweden) designed the "FM dream". "Nirvana" was a proactive FM organization with continuous new solutions and knowledge about quality and cost. True partnerships with suppliers, true green FM and new technology distinguished this organization which had full responsibility of workplaces,

delivered standardized as well as individualized services, was able to measure the value created and had "happy customers". Kuchler identified three sourcing strategies: "The options are in-house delivery, outsourcing and a hybrid solution of in-house delivery and out-tasking." The parameters of these strategies were location and geography, size of the respective sites, the type of core business and the maturity of the FM market. Jelle van der Kluit (Twynstra Gudde, The Netherlands) explained the maturity classification of FM markets as pioneer (UK, Netherlands and Denmark), developed (Western and Southern European countries), emerging (Central European countries) and pre-emerging (Eastern European countries) markets.

### Strategy depends on core business and core values

Gianmaurizio Cazzarolli (Tetra Pak, Italy) said that all the points of the "FM nirvana" could be achieved through a hybrid strategy that combined all the service advantages and allowed for flexibility. The challenge with a hybrid strategy was to avoid disappointing the FM in-house staff: "They have to be proud to work for the company, but they have to be even prouder to work together with the service provider." EuroFM's Vice Chairman, Wayne Tantrum (Interserve FM, UK), also referred to the importance of social responsibility and value added when out-tasking. The "FM Debate of the Year" showed that emphasis lay on control with an in-house strategy, a hybrid strategy emphasized flexibility and an outsourcing strategy focused on the core business of the company. The sourcing strategy, however, depended not only on the core business but on the corporate core values. Cazzarolli affirmed this and pointed to intercultural values: "We try to benefit from the corporate culture of a Swedish mother company as well as from the national culture at the Italian site." Leif Møllebjerg (Lego Systems, Denmark) found the corporate culture more important than the culture of the country.

### Outsourcing only cheaper in a long-term perspective

Walter Verdonk (Sodexo Altys, The Netherlands) explained that in a short-term perspective outsourcing was more expensive due to the transition investment. "But in a long-term perspective outsourcing is cheaper," he said. Verdonk recommended outsourcing only when the needs and expectations related to that strategy were clear: "The organization has to be ready for outsourcing." Hybrid solutions were always a compromise, and the strategy had to be the best for the organization. Gianmaurizio

Cazzarolli pointed out that the organization's role had to be defined before the decision on the sourcing strategy could be taken. Values and goals affected the strategy as well as the availability of the desired service quality. Besides, transparency was significant.

### Strategic factors: quality versus cost

The great majority of the audience agreed with Cazzarolli that quality was the most important strategic factor when considering make-or-buy. Verdonk considered costs the essential factor. Leif Møllebjerg gave the key stakeholders top priority: "At Lego, these are the children." Møllebjerg declared that value-add concerned everything to do with employees and facilities: "It's not only about money, but about quality measurement." For a "proactive FM", the alignment of the customers' expectations was crucial. David Martinez (3G-Office, Spain) confirmed that FM offers had to be adapted to the customers' needs. "FM requires flexible, scalable quality services at the right cost," defined Møllebjerg and presented the "value add equation" comprising volume, quality, flexibility and costs as the basic elements of service provision.

### Knowledge of customers' core business and supply chain

Magnus Kuchler summed up by saying that the sourcing strategy had to be tailor-made for each organization. He addressed new ways of working and new technology as an enabler. According to Kuchler, the highest improvement potential could be realized by centralizing FM globally for all sites and services. "Much of the improvement potential has not been realized due to a decentralized approach," he remarked. Mike Liddle (Business and Facilities LLP, UK) showed that by reducing the number of FM suppliers, cost savings and more service flexibility could be obtained. "Understanding the supply chain of the client is critically important," he made clear. Gianmaurizio Cazzarolli also stressed the importance of knowing the customer's core business. Liddle brought up the cultural fit depending on "the care of what you do and the respect towards the providers". He explained that partnership meant growing together and argued for innovation. Jelle van der Kluit (Twynstra Gudde, The Netherlands) agreed that innovations in FM were necessary to prepare for the changed demands of organizations in the future. Liddle concluded: "Everybody can save money, but setting good standards in an international portfolio is much more difficult to do."

*continues on page 22*



### Cultural competence decisive

Prof. Keith Alexander (University of Salford, UK) advocated investing in people and developing new business models. "The increasingly global FM business requires competent, mobile, culturally aware and internationally experienced FM professionals," declared Verena Hotter (Kufstein University of Applied Science, Austria). Students had to be prepared for the "real world" by international education programmes dealing with similar content and different cultures. Cultural understanding, passion and empathy were expected from both students and employees. David Martinez also advised not to underestimate cultural differences: "A facility manager has to provide services in several different countries."

### Future FM tasks: energy management and sustainability

Dutch information industry trend watcher Rob Creemers stated that technology forced people to think globally. The internet made distances disappear and borders fade away; "mobile penetration" was proceeding with one million mobile phones being sold per day. "Technology will determine the future of the human race," Creemers pointed out. He went on to discuss information technology, nanotechnology and biotechnology and expressed a warning: "A globalised world cannot be regulated or controlled. Everybody is connected, but nobody is in charge." As future trends, he named ageing, globalization, pollution and resources, and he predicted severe problems. "We need another mindset," claimed Creemers. Considering the environment first had to lead to societal concerns and not till then to economic issues. "The core message for facility managers is: We have to use less energy," Creemers proclaimed. "It's all about sustainability." In five years, the facility manager could have become a sustainability manager. The trend watcher pointed out: "There are three questions everyone has to answer concerning his job: Will there be a demand in the future? Can someone in Asia do it cheaper? Can a computer do it faster?" Creemers encouraged the audience to keep learning and to be creative: "You have to be able to change. Adaptability matters. Try something new!"

### Interface between art and business

To be "awake and creative" was also the appeal made by Slovenian Cultural Ambassador Miha Pogacnik. The concert violinist and

entrepreneur deconstructed a musical masterpiece to illustrate business processes and visualized his explanation by drawing. "The first step on the way towards a target has to be right," Pogacnik said. He addressed the "bottom line of life": "Productive resignation is the precondition for quality change" because concepts were questioned then. If nothing was changed after having reached the bottom line, people and organizations would become "normal". Pogacnik argued for a "peripheral leadership style" using input, questions and power from the periphery: "Chaos is the first step of integration." The result was "capital", which was not money but "capability". EuroFM's Vice Chairman Wayne Tantrum referred to Pogacnik's postulate not to be "normal" and urged the attendees: "Let's make the difference!"

THE European Facility Management Conference 2010 - EFMC2010, the 7th edition in this joint-venture format between host institutions EuroFM and IFMA, will take place in the city of Madrid and will definitely represent a new landmark in the FM profession. EFMC 2010 expects more than 600 delegates from all over the world in the single most relevant facility management event in Europe. See you all in Madrid!

## ENG Report from Rene Hermans, Chair

Dear EuroFM colleagues,

It has been more than 2 months since the inspiring EFMC 09 Amsterdam was held.

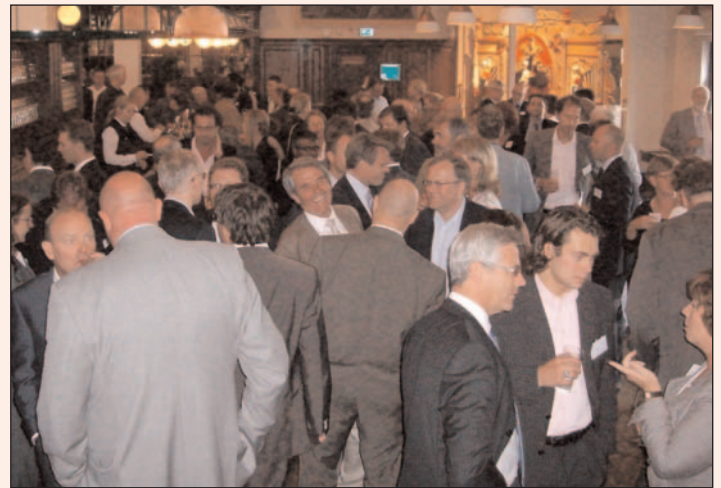
In this newsletter we would like to bring the following items to your attention:

- EFMC conference update,
- The Copenhagen program September 11 and 12, 2009 and
- The proposed agenda of our ENG meetings in Copenhagen

### EFMC conference update

We started back in March 2009 with 38 poster candidates. After a preliminary selection, 18 posters participated in Amsterdam and were presented to the jury. The jury members were Ms. Suvi Nenonen, Ms. Pat Turnbull, Mr. José García Cuartero, Mr. Charles Claar and Mr. Andreas Rorhegger. During the common closing plenary the 5 students with the 3 best posters presented their projects to the audience. The finalists were:

Francesca Gallo and Charlotte Spangenberg from Hanze Groningen



University with: "FM begins with your every day life"; Glenn Portier from NHTV Breda University with "Hard = soft, soft = hard"; Arlett Daberkow and Michael Kuehberger from Kufstein University with "Generation Renovation".

The more than 400 delegates chose Arlett and Michael as winners of the Student Poster competition 2009.

In April 2009 the jury members held in-depth interviews with all the candidates. At the Gala dinner Hanna Koskito from Helsinki University of Technology and Fatima Stitou and Ronald Balvers from INHolland University Diemen were presented as candidates for the Best Student Award. Hanna was chosen Best European FM student 2008 by the jury consisting of Mr. Hans Topée, director of New Directions and Ms. Antje Junghans on behalf of the ENG.

The prize for all three winners was free travel, accommodation and entrance to attend the IFMA World Work Place Conference in Orlando in October.

We would like to offer special thanks to our sponsors: New Directions, Glaxo Smith Kline, Metainy and the IFMA Foundation.

The Education Network Group invites all member universities to start preparations for next year's Poster and Best student Competition in Madrid as soon as possible. Please select your best students for both competitions and keep an eye on the EuroFM website, where the new competitions will be announced.

### The Copenhagen program

The next EuroFM event will be in Copenhagen on September 11th and 12th in cooperation with DFM and ISS. The conference's inspiring programme is attached.

The proposed agenda of our ENG meetings in Copenhagen

Because of the time available it was decided to divide our attention between organizational and practical matters on the one hand, and the educational theme on the other.

### Friday September 11 from 9.00 - 13.00 hrs

#### Practical and organizational matters

- Evaluation Poster Competition Amsterdam
- Evaluation Best FM Student Amsterdam
- General evaluation of the EFMC Amsterdam conference including the research conference and ideas for improvement from the point of view of the ENG
- Evaluation FM Education Guide 2009
- Official ENG meeting in Madrid, yes or no?
- Chairman and vice chairman succession
- Cooperation with RNG and PNG
- ENG role in stimulating exchange of students and lecturers
- Sponsoring of ENG activities, our sponsors at the moment are:
- Education Guide: Facilitec
- Best Student: New Directions and IFMA Foundation
- Poster Competition: GlaxoSmithKline, Metainy and IFMA Foundation
- Other matters

### Saturday September 12 from 09.00 - 11.30 hrs

#### Educational theme

1. In their London meeting, ENG agreed that a more general approach to the FM profession and skills is preferable to a more specialist approach. In order to take the next step in understanding each other's basic assumptions about FM higher education the following question will be the theme for the Copenhagen meeting

"How does your curriculum deal with all building aspects?"

All members are kindly invited to prepare a short presentation with their views and educational approach!!

2. Preparation for the Groningen

continues on page 23

## EuroFM Report

*continued from page 22*

conference in January 2010.

What will our next educational theme be?

**Saturday September 12  
from 11.30 - 13.00 hrs**

*General member meeting EuroFM*

I sincerely hope to meet you all in Copenhagen. If you have any questions please do not hesitate to contact me Hermans.r@nhtv.nl.

## RNG Report by Margaret Nelson, Chair

### Annual Research Symposium

The 8th annual EuroFM Research Symposium took place between the 16th and 17th of June 2009 at the Okura Hotel, Amsterdam. Research sessions were well attended by researchers and practitioners. Feedback from attendees suggested that the event was a success, and special mention was made of the plenary sessions at the end of each day which were found to be very valuable. We thank the organizing committee for a job well done.

### Call for Papers

- A call for papers for EFMC2010 now available on <http://www.efmc2010.com/>. Please note that the closing date for abstracts.
- Opportunity to present EuroFM research in Pennsylvania, US (June 2010). Please contact Dr Margaret Nelson [M.Nelson@bolton.ac.uk](mailto:M.Nelson@bolton.ac.uk) for further information
- Call for papers for annual conference "Kufsteiner Facility Management" taking place at Kufstein University of Applied Sciences, January 27-29 2010. For further information visit [www.fm-gesprache.at](http://www.fm-gesprache.at)

### EuroFM FM Researcher of the Year Award 2010

First we congratulate the 3 finalists for the EuroFM Researcher of the Year Awards 2009 - Jessica Niemi (née Orn), Ruud de Hass and Nils Gersberg. The 2009 award was won by Nils Gersberg for his research into the relationships between physical, social and virtual workplaces.

Nominations are now open for the FM Researcher of the Year Award 2010. Application forms and guidance can be found on <http://www.efmc2010.com/> and <http://eurofmresearcher.ning.com/>

### Research Network Group Meetings

- The next RNG meeting will be in Copenhagen between the 11th and 12th of September. Agenda and registration available via [www.eurofm.org](http://www.eurofm.org)
- Groningen - 22nd and 23rd January 2010.
- Lisbon - 24th and 25th September 2010

### Postgraduate Research Network

Lukas Windlinger, Zurich University of Applied Sciences, Switzerland, is the new co-ordinator of the EuroFM postgraduate research network. Lukas can be contacted via [wind@zhaw.ch](mailto:wind@zhaw.ch). He will be responsible for co-ordinating postgraduate research activities on behalf of the RNG. Postgraduate research students from EuroFM member organizations should please contact Lukas for details of events and activities or visit <http://eurofmresearcher.ning.com/>.

### EuroFM Projects

#### FM Process Project

- The report for this project is currently available in the members area of the website
- FM Futures Project
- The report for this project will be available on the EuroFM website at the end of September 2009.

#### EuroFM Value Added Project

- To find out more about this research or to participate, kindly contact Prof Per Anker Jensen, Centre for Facilities Management, DTU [pank@man.dtu.dk](mailto:pank@man.dtu.dk)

#### EuroFM Workplace Management Project

- To find out more about this research or to participate, kindly contact Dr Suvi Nenonen, Facility Services Research Group (FSRG), Helsinki University of Technology, [suvi.nenonen@tkk.fi](mailto:suvi.nenonen@tkk.fi)

### Research Opportunities

- This section will be used to introduce research opportunities. If you have a project and you are seeking collaborators, please send relevant information to Dr M Nelson, [M.Nelson@bolton.ac.uk](mailto:M.Nelson@bolton.ac.uk)

### Other News

I recently attended an international research workshop organized by the University of Illinois and Worldwide Universities Network, exploring collaborations between academia and

industry in the construction industry. Some of the issues on the agenda were very similar to issues raised during discussions at EFMC2009. A list of key learning points from the workshop is currently available on the members' area of the EuroFM website. A full report will be made available by the workshop organizers and will be accessible in the members' area of the EuroFM website.

## PNG Report by Helena Ohlsson, Chair

The Global Financial Crisis has not left many of us unaffected, and for the Practice Network Group, representing the practitioners in Europe; it is obviously harder to generate projects and sponsorship at a time when many organizations are reluctant to invest outside their core business. We have also seen the impact on ongoing initiatives and partnerships.

In this light, it is therefore extremely positive to see the EFMC conference in Amsterdam in June, attracting a higher number of participants than last year. The fantastic work of the professional Program Advisory Group (PAG), led by Lennart Harpe, who put the program together, played a big role in this. The PAG for 2010 is already working on next year's program, under the leadership of Albert Pilger.

The EFMC is also when the annual meeting for Leaders of all professional organizations in EuroFM is held. More than 10 countries were represented at this year's meeting where we saw the presentation of the following:

- The Energy Savings project, by Georgina Bos and Annika Holtslag which is the collaboration with Facility Management Netherlands

and the University of Rotterdam. We have had a successful collaboration over 3 years, and we hope to continue next year, with Market Research.

- The FMP project is a collaboration with IFMA on defining the competence and creating a certification for FM. The focus of this project for IFMA is no longer Europe but the world. EuroFM will continue to participate and represent Europe.
- The new issue of the Education guide includes for the first year some professional training institutions, and it is the goal of the PNG to increase the number for next year.
- The PNG has the opportunity to work together with IFMA on an initiative to write guides on sustainability for FM. It is a great opportunity to create and spread global competence on this important topic. Please get in touch with EuroFM if your organization would like to write or co-write a guide

The Practice Network Group has been a driving force for the creation of a new web page for EuroFM. A new proposal was presented in Amsterdam, and we hope there will be sufficient resources to take this initiative forward, in order to reach a greater group of members to take the Network to the next level.


As Copenhagen will be my last meeting as Chair of the Practice Network Group, I hope to see all of you there, joining the Practice Network Group meetings on Friday the 11th and Saturday the 12th of September. We hope to be able to present a really interesting speaker along with an opportunity to discuss





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