



The size of the European FM sector and IT services in FM

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Size of the FM industry

Facility Services are not presented as a separate industry in the classification of economic activities

Aim: estimation of the size of the FS industry in comparison to other other industries in the European countries based on **Value added at factor cost**

„Value added at factor cost is the gross income from operating activities after adjusting for operating subsidies and indirect taxes.“



Methodology

Calculation of the size of the Facility Services by using data from Eurostat (Annual detailed enterprise statistics)

Identification of services and industries relevant for FM according to the EN 15221-4:2011

Expression of the size as the ***value added at factor costs*** in percentage of the total value added at factor cost for the NACE sectors B-N and S95 for 2013

FS compared to other sectors

	EU (28 countries)	Germany	Austria	Slovakia	Italy	Poland
Manufacturing	26%	34%	28%	29%	29%	30%
Wholesale and retail trade; repair of motor vehicles and motorcycles	18%	17%	18%	16%	17%	18%
Professional, scientific and technical activities	10%	9%	8%	6%	7%	5%
Facility Services incl. organisations and private housing	8%	8%	9%	6%	8%	7%
Information and communication	8%	7%	5%	7%	7%	6%
Transportation and storage	8%	7%	9%	7%	8%	7%
Administrative and support service activities	7%	7%	6%	4%	5%	3%
Facility Services incl. Organisations	6%	6%	6%	4%	6%	5%
Construction	8%	6%	9%	4%	7%	8%
Real estate activities	4%	5%	5%	7%	3%	2%
Electricity, gas, steam and air conditioning supply	4%	3%	3%	6%	4%	7%
Accommodation and food service activities	3%	2%	5%	1%	4%	1%
Insurance, reinsurance and pension funding, no compulsory social security		2%	2%	5%		
Water supply; sewerage, waste management and remediation activities	2%	1%	1%	1%	2%	2%
Mining and quarrying	1%	0%	1%	1%	1%	4%
Central banking		0%			1%	
Repair of computers and personal and household goods	0%	0%	0%	0%	0%	0%
Other monetary intermediation				5%	7%	6%

* Only countries included that didn't show more than three missing values



Status Quo and Trends in FM

- Since 2005 the TU Vienna analyses the demand side of FM on a yearly basis
- The survey is conducted amongst the 500 biggest companies of each country (measured by revenue)
- Standardized questionnaire
- Participating countries:
 - Austria
 - Germany
 - Romania
 - Spain
 - Italy

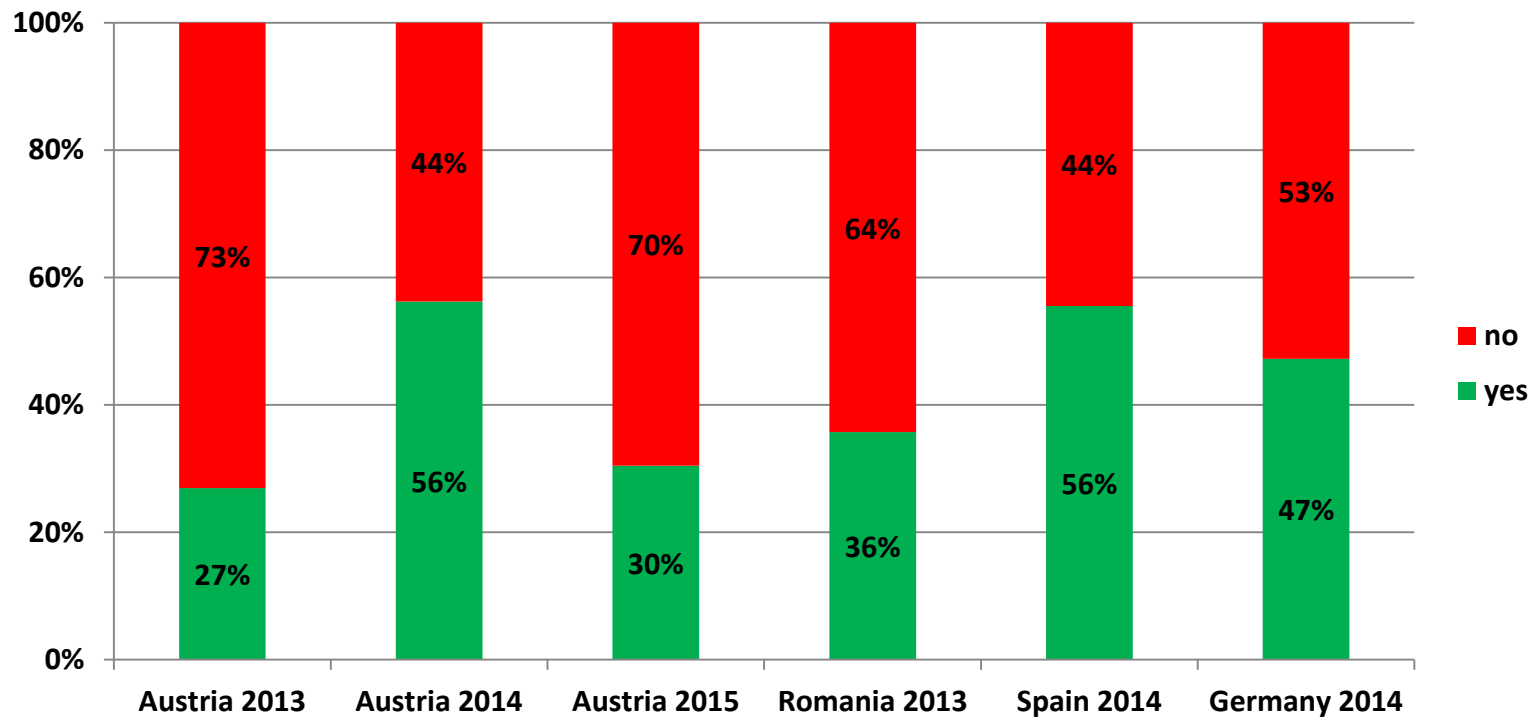


Content of the Survey

- General questions (industry, number of employees, revenue, etc.)
- Organisation of FM
- Value added of FM
- Outsourcing
- IT-support

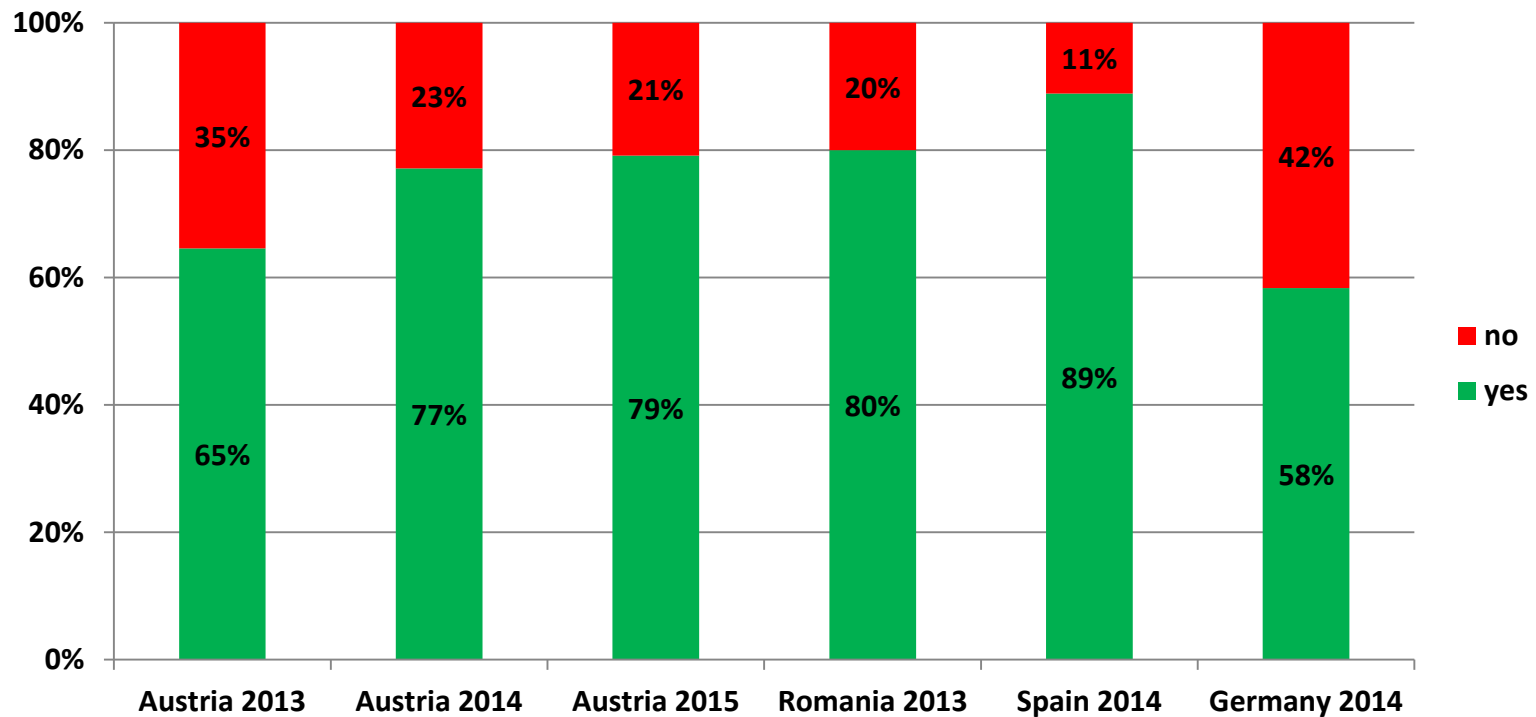


Usage of CAFM Systems





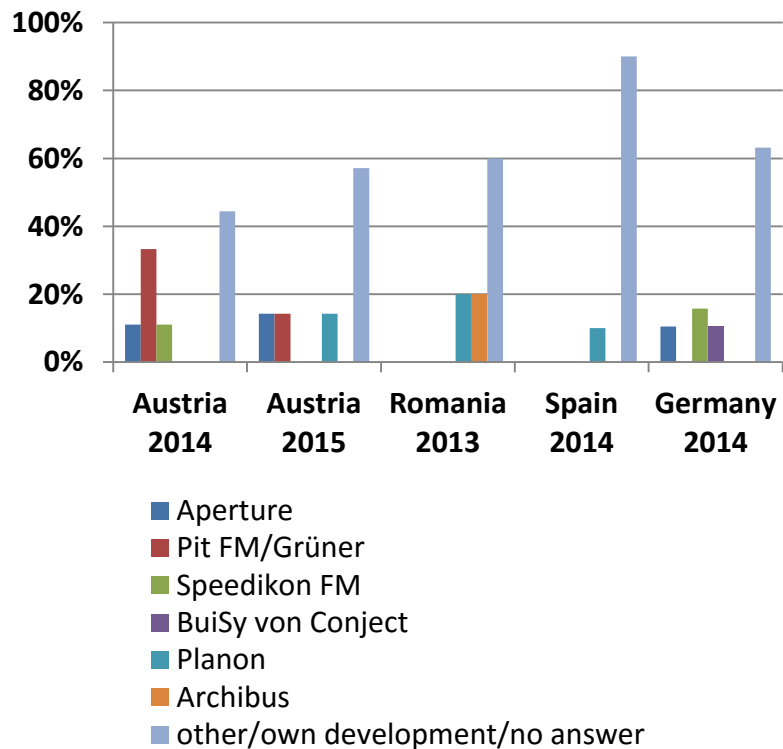
Usage of ERP systems



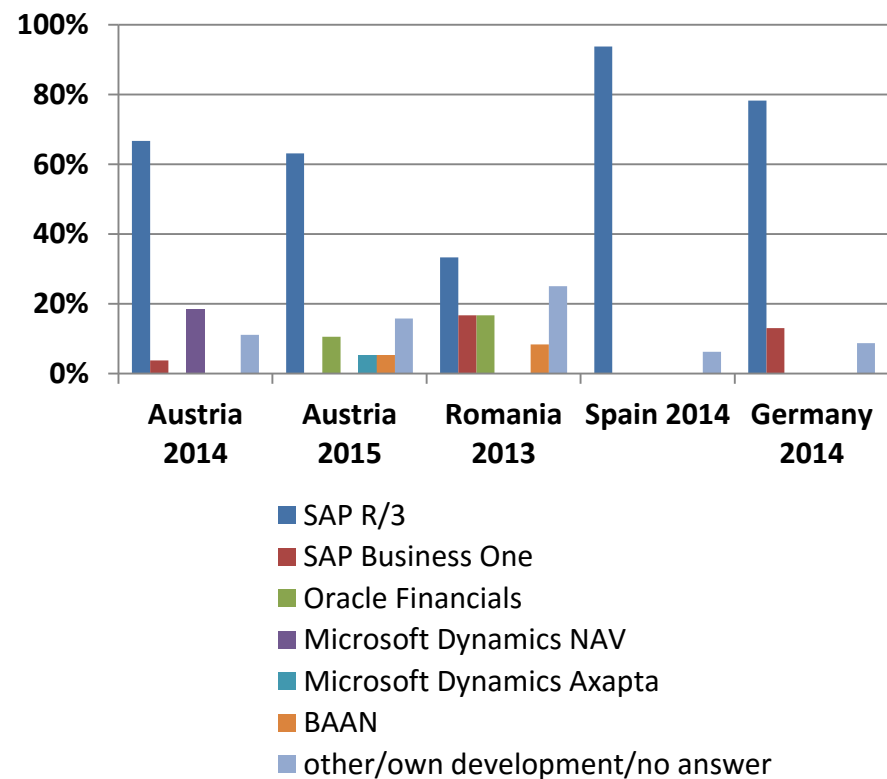


Used Systems

CAFM



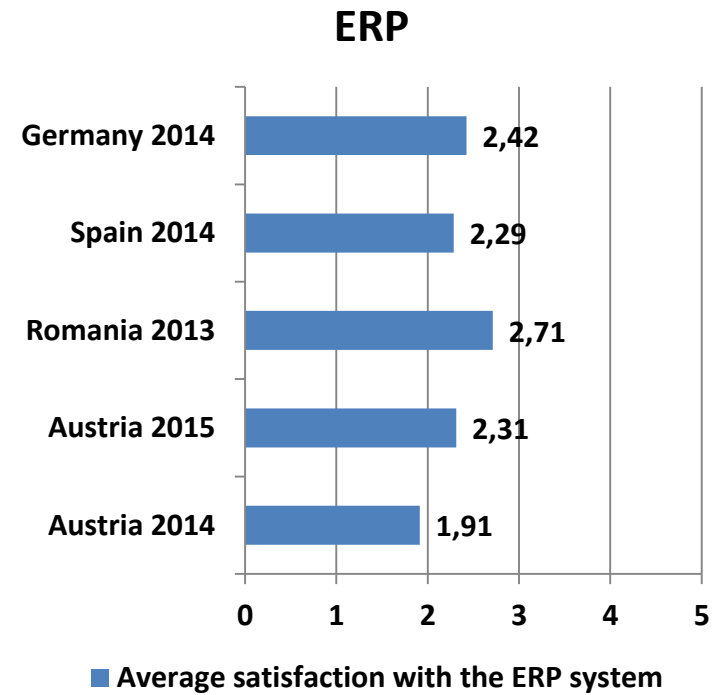
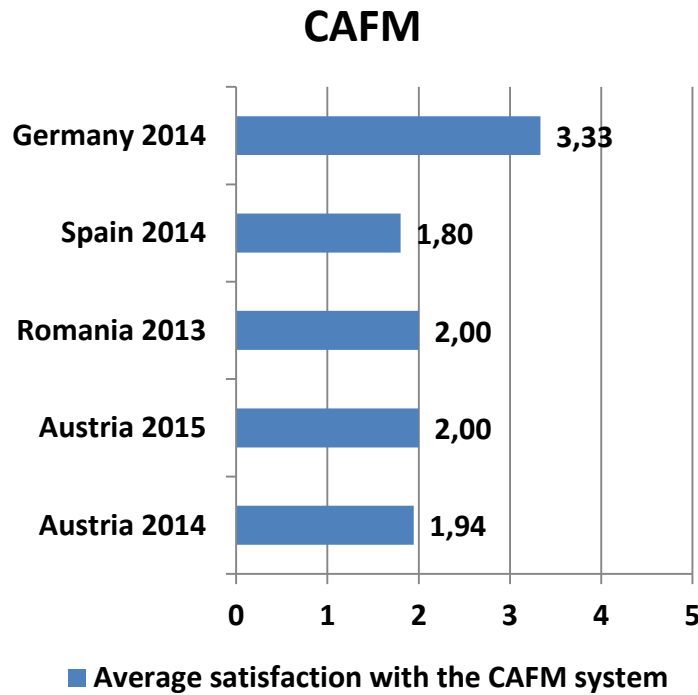
ERP



*expressed as a percentage of those companies who use a system.



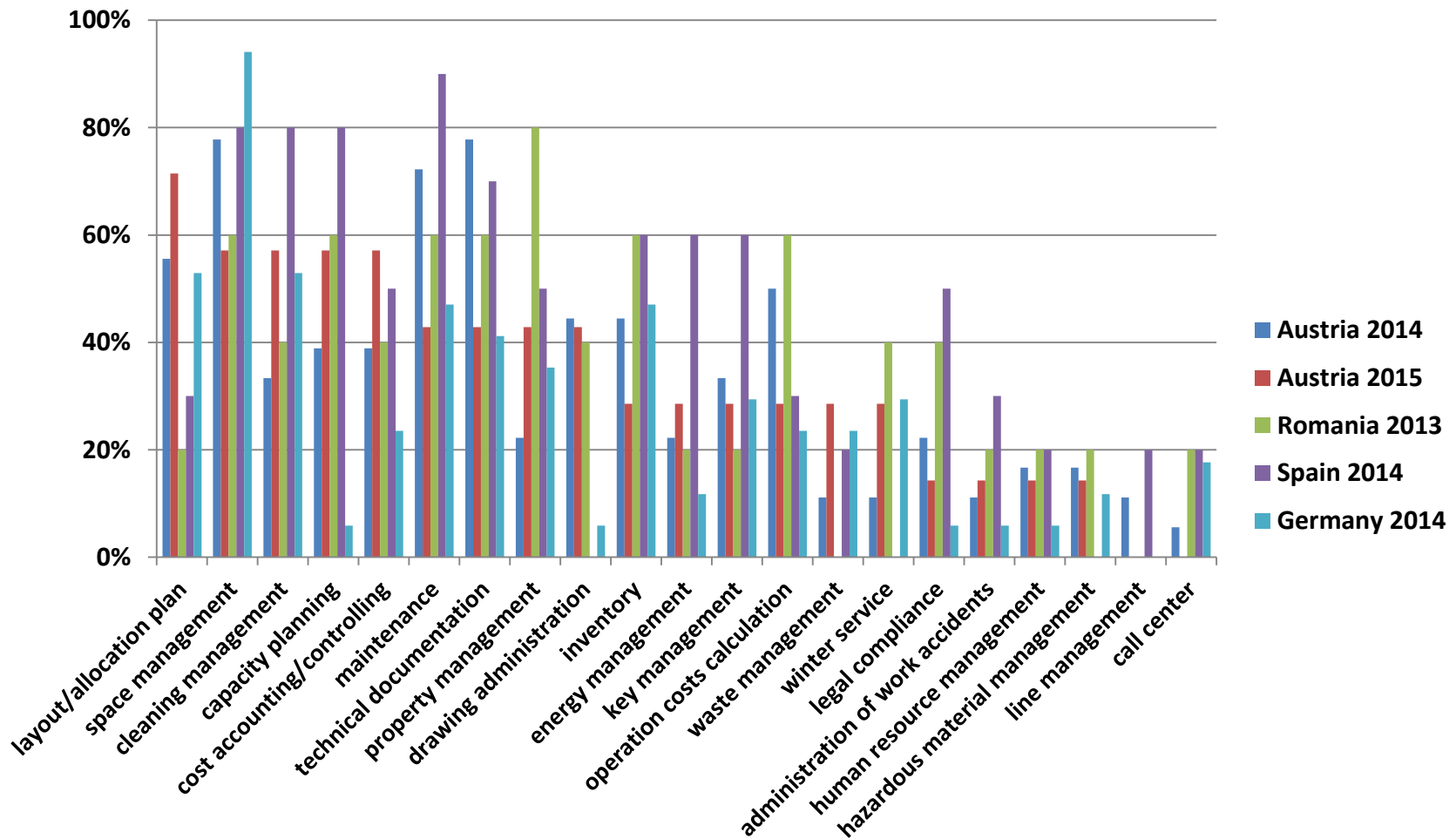
Average satisfaction with the used system



Scale: 1= very satisfied to 5= not satisfied



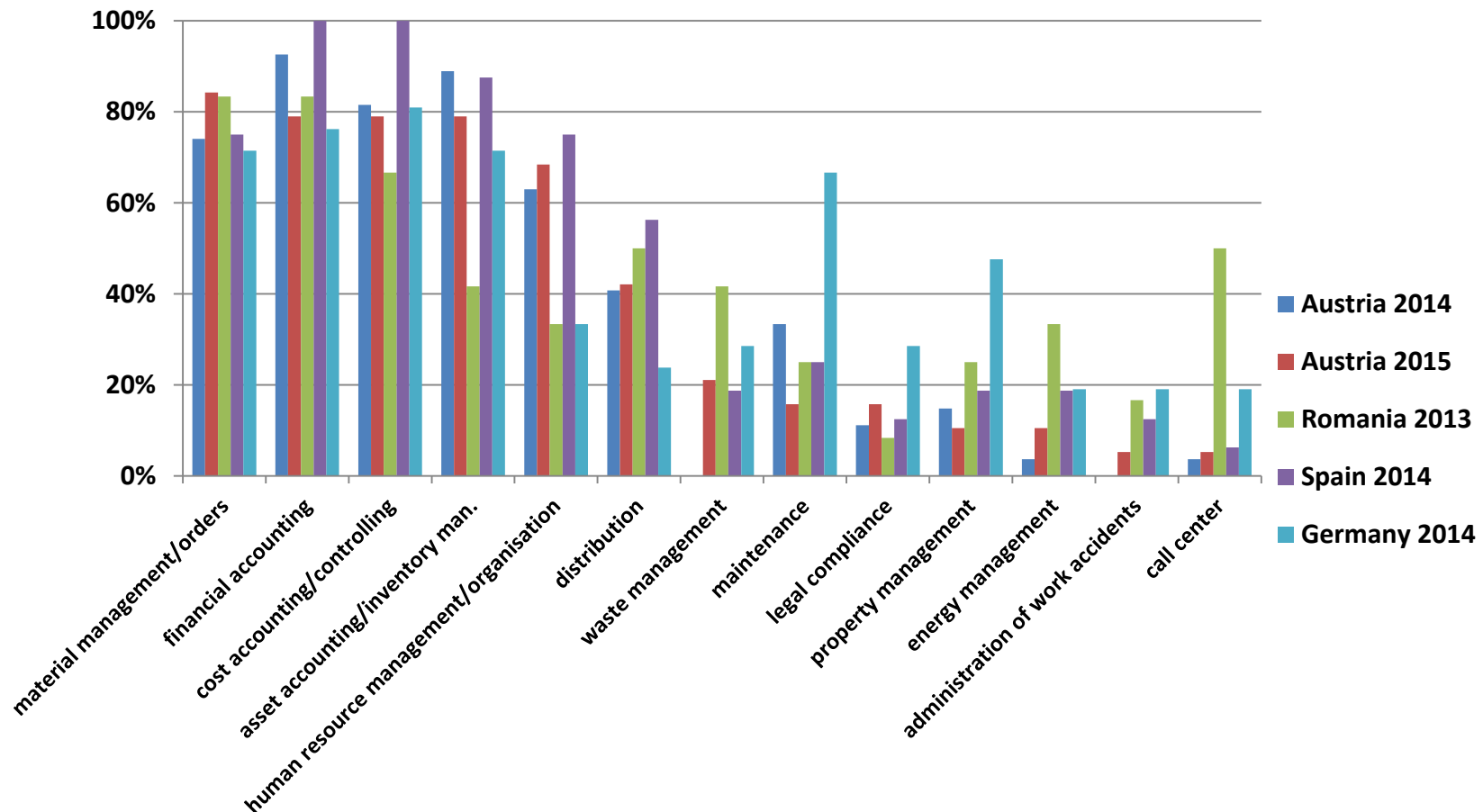
Areas covered by the used CAFM system



*expressed as a percentage of those companies who use a system.



Areas covered by the used ERP system



*expressed as a percentage of those companies who use a system.



Conclusio

- FS are a major industry
- Demand side used mainly ERP systems for managing these services
- CAFM is used by less then 50%



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Thank you for your attention!

