

Market Intelligence Report 2011

Facilities Management in the Middle East

FM EXPO
AT THE BIG 5

Published: **October 2011**

Part of ispy publishing limited Industry Survey, Market Intelligence and Forecasts Series



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Research Methodology

This report was commissioned by dmg :: events and is designed to provide an overview of the FM sector in the Middle East.

The study was conducted through 5 work streams:

- A review of global industry trends through a desk-based analysis of key documents and data
- The construction of a comprehensive profile of the sector by collecting and analysing data on the sector's firms
- A benchmarking exercise, using statistical data on key competitor nations, to assess the international competitiveness of the sector
- A series of consultations with firms, industry experts, and key intermediary bodies to provide qualitative information on the performance of the sector

It should be noted that human intervention plays a necessary and desirable part of all our industry forecasting techniques. Intimate knowledge of the data and industry ensures we spot structural breaks, anomalous data, turning points and seasonal features where a purely mechanical forecasting process would not.

A note on the research

To date, research on the MENA FM sector has been limited. Research on the international FM sector is somewhat more prevalent however it should be made aware that the research that does exist does not relate to the trends that affect the MENA region.

Some comparative research does exist, but serves to highlight the paucity of accurate data on the FM industry. To date, however, little targeted research – by academics or policy analysts – has focussed on the industry and its implications for market growth.

As illustrated, while the industry may be relatively well understood and articulated, the growth and practical implications are not.

Data availability, collection and analysis

What is clear is that the quality of data available on the MENA FM industry is poor. Most data that does exist were gathered as part of market research surveys – and often relatively small scale surveys at that. Little information is available on the reliability of the statistics generated from this data, meaning that the opportunities to develop decisions on the MENA FM industry on the basis of the data are strictly limited.

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FM :: Introduction

Although, the global recession has had a negative effect on growth patterns, the global FM market is expected to recover with an upturn in the world economy, growing emphasis on modernization of office spaces, the continued trend towards outsourcing, revival in construction and the real estate industries.

Against a background where companies are pressurised into rethinking their property strategy, building maintenance, communications infrastructure, administration, and space management, into a better and more cost-effective solution, the importance of FM comes to the fore. As companies modernize their business environment, driven by the need to remain competitive, and retain critical survival capabilities in a fast changing marketplace, their commitment to take up FM services industry reaches new levels.

FM is a management discipline that supports and improves core company processes and increases return on investment by result-oriented use of resources, services, and activities, vital to the success of any organization. There are several advantages stacked in the favour of FM, including, cost advantage, economies of scale, and efficient management of facilities and assets. One of the strongest arguments for FM is that it removes the burden of peripheral activities, allowing the businesses to direct more attention towards core business.

By outsourcing non-core functions, facility owners have the ability to free essential resources for reallocating in revenue-generating activities. Despite the complexities posed by regulations, IP protection and employee rights, efficient FM strategies can still drive incremental growth. As a result the market is set to expand, in the coming years, as small and medium sized businesses as well public facilities wake up to the benefits of FM industry.

As FM operations are heavily dependent on overall corporate health, and public sector spending, the recent economic recession has, unsurprisingly, taken its toll on the world FM industry. Fluctuating corporate balance sheets, tight liquidity and customer budgets, fall in service requirements, enterprise scepticism over infrastructure investments, high levels of unemployment, have all subdued growth in FM services. Recession-induced contract renegotiations have especially dented revenues in the industry. Recessionary pressures also split large contract deals into smaller contracts of lower values, with shorter turn-around times. Smaller FM budgets affect maintenance costs, with specialist sub-contractors under pressure to cut down on labour rates.

However, the recession hasn't pushed the growth rates of global FM into the red primarily because the most spontaneous need to curtail costs in an unfavourable business environment is overridden with a simultaneous need to develop a platform for future growth. Although, the current global recession throws a temporary dampener on growth patterns, a recovery in the financial scenario in the immediate future will push the market's growth fundamentals back into the fore.

In the mature markets of North America and Japan, FM demand growth will remain modest in the near term, reflecting the economic slowdowns in these countries. Continued weakness in building sector is one factor limiting market growth in North America and Japan. Demand for FM in rest of the world will remain healthy thanks in part to the emerging markets, which will maintain their own dynamism. Asian countries including China and India, Middle East, and South Africa hold the key to future growth.

Major players in the global marketplace include ABM Industries Inc, Amey, Aramark, EMCOR Group Inc, Etisalat FM LLC, Europa, Faceo FM UK Ltd., ISS, Johnson Controls Inc, Kier Facilities Services Limited, MITIE Group Plc, TFN Group, and Turner FM Ltd., among others.

This report provides an overview of the FM market and offers a snapshot of opportunities prevailing in the market.

FM:: Fast facts

- The outsourced FM sector in the GCC region is expected to reach a value of US\$10 billion by 2012, according to a study conducted by Arab Business Review.
- Saudi Arabia's FM sector is worth nearly US\$100 billion, while, across the Gulf, it is expected to be valued at US\$892 billion, according to industry estimates.
- The global market for FM is projected to touch US\$394.7 billion by 2017, according to a new market research report by Global Industry Analysts, Inc.
- Growth in the global construction will outpace world GDP over the next 10 years. *
- Growth in the Asia powerhouses and cyclical rebound in the US will fuel massive growth in world construction over the next ten years. *
- Global construction to grow by almost 70% from US\$7.2 trillion today to US\$ 12 trillion by 2020. *
- China, US and India generate over half of the US\$4.8 trillion growth. *
- The next decade will see an acceleration of the shift for construction towards dynamic emerging markets and away from low-growth developed countries.
- China overtook the US as the world's biggest construction in 2010. By 2020 emerging markets will account for more than half of global construction output.
- Emerging markets will be boosted by rising populations and rapid urbanisation.
- Private investment will need to be attracted to help fund key infrastructure such as water, energy and transport in emerging market countries and developed countries where public debt is high.
- India will grow faster than China. Investment to meet the demands of a rapidly growing and urbanising population will see India overtake Japan as the world's third biggest construction market by 2020.
- The global economic downturn damaged the construction industry badly. In each of the four years to 2010 construction growth underperformed global GDP. If construction had kept pace with GDP, output would have been about \$140billion higher in 2010
- In the decade from 2010 to 2020 construction growth will outpace GDP each year. It is estimated that this growth will increase construction output's share of global GDP to 13.2% in 2020.
- Environmental policy is likely to have an increasing impact on construction activity. About 50% of carbon emissions are generated by activities in buildings and climate change policy is already driving investment in lower carbon buildings.
- Russia and Turkey will be Eastern Europe's construction powerhouses in the next decade.
- Turkey's population is growing and increased investment ahead of potential EU membership will boost construction output sharply and move it ahead of Poland as the region's second biggest market by 2020.
- Growth in Saudi Arabia, with its young and expanding population, will increase, and expected change to mortgage laws will help drive growth in residential construction.
- Egypt's growth rate will decline from the high levels seen in the last five years but will remain relatively strong, with a rising population. With large public debts, Egypt has passed a law allowing private investment in traditionally publicly funded infrastructure but recent events may delay this development.
- Markets such as Qatar, Libya and Algeria will finance most of their own investment from oil and gas revenues and Qatar will be the fastest growing market covered by our report.
- Qatar's planned growth will be accelerated by \$100billion of spending on rail, roads, water and other infrastructure in preparation for hosting the 2022 FIFA World Cup.
- The introduction of FM from conception is now seen as essential in keeping subsequent maintenance costs to a minimum. It has been estimated that the initial development cost of a facility is only 20% of the total money spent across the lifetime of a building with FM and maintenance making up the remaining 80%.
- Saudi Arabian government intends to spend over £60billion (\$100billion) on infrastructure to 2013, giving rise to significant opportunities in FM
- Property services are estimated to represent the largest market for FM, accounting for approximately 34% of the market in 2009, followed by cleaning services at 23%, security services at 5%, catering services at 15%, support services at 11% and FM services at 2%.
- The FM industry in the UAE alone would be worth on average approximately \$1.4 billion per year over a period of 25 years for projects that are being released in the coming five years
- About 50 per cent of FM is utilities, the rest are mechanical, electrical and plumbing (MEP), cleaning and security.

* Source: PwC Global Construction 2020

FM :: A definition

FM is an interdisciplinary field primarily devoted to the maintenance and care of commercial or institutional buildings, such as hospitals, hotels, office complexes, arenas, schools or exhibition centres. However, there are differences in definition of FM depending on different regions around the world.

According to the International FM Association (IFMA), it is "a profession that encompasses multiple disciplines to ensure functionality of the built environment by integrating people, place, processes and technology."

The European FM association, EuroFM, uses the EN15221 definition. The definition of FM, EN15221-1, provided by the European Committee for Standardisation (CEN) and ratified by BSI British Standards is: "(the) integration of processes within an organisation to maintain and develop the agreed services which support and improve the effectiveness of its primary activities." According to this European standard the scope of FM is 'Space & Infrastructure' (planning, design, workplace, construction, lease, occupancy, maintenance, furniture, cleaning, etc.) and 'People & Organisation'(catering, ICT, HRM, HS&S, accounting, marketing, hospitality, etc.).

According to British standard BS 8536:2010 FM is performed during the operational phase of a facility or building's life cycle, which normally extends over many decades. It represents a continuous process of service provision to support the owner's core business and one where improvement is sought on a continuous basis. The support of administrative FM through information technology is identified as computer-aided FM (CAFM).

Facility or facilities?

Facilities Management is generally interpreted as 'FM' in the US, Australia and some other territories. In the UK and across much of Europe the term 'FM' is used.

The difference is largely historical and not especially significant. However, 'Facility Management' tends to mean the management of a 'facility', for example a hospital or office complex, whereas 'Facilities Management' refers to a broader range of activities.

FM :: Who is a facilities manager?

The description of a FM manager varies depending on the region of the world in which you work, given that there are various definitions.

The various areas facilities managers work in and some of the specific job titles they hold include:

Areas of work:

- People Management
- Working with Suppliers and Specialists
- Property Portfolio Management
- Building Fabric Maintenance
- Managing Building Services
- Managing Support Services
- Project Management
- Customer Service
- Environmental Issues
- Space Management
- Procurement
- Risk Management
- Financial Management
- Quality Management
- Information Management

Job titles of a facilities manager:

- Facilities Manager
- Head of facilities
- Senior Facilities Manager
- Manager – facilities and support services
- Workplace Services Contract Manager
- Area facilities manager
- Facilities Account Manager
- Head of property and facilities (EMEA)
- Projects and facilities manager
- Facilities and purchasing manager
- Specialist FM engineer

FM :: The Role of the FM Manager

The discipline, technology and services of FM and the role of facility managers in particular are evolving to the extent that many managers have to operate at two levels: strategic-tactical and operational. In the former case, owners need to be informed about the potential impact of their decisions on the provision of space and services. In the latter, it is the role of a facility manager to ensure proper operation of all aspects of a building to create an optimal, safe and cost effective environment for the occupants to function. This is accomplished by managing some of the following activities.

- Access control
- Asbestos
- Building automation systems
- Building fabric and decorative
- Building information modelling
- Business continuity planning
- Car Parking
- CCTV
- Cleaning
- Computerized maintenance management system
- Control of Substances Hazardous to Health
- Corrective maintenance/Reactive repairs
- Daily inspection of escape routes and fire exits
- Disabled Access
- Disaster recovery
- Display Screen Regulations
- Dry risers
- Electrical portable appliances and fixed wiring
- Emergency lighting
- Emergency procedures
- Environmental Issues
- Fire alarm systems
- Fire extinguishers
- Fire protection and safety
- Fire Risk Assessments
- Grounds maintenance and horticulture
- Heating, ventilating, air conditioning and refrigeration
- Help desk
- Industrial hygiene, including indoor air quality
- Intruder alert
- Lease Negotiations
- Lifting equipment
- Lightning conductors
- Mail Room
- Mansafe systems (window cleaning, roof access, etc)
- Meeting room management
- Office space planning, layout, and furniture placement
- Pest control
- Photocopying
- Pressure systems
- Preventive and predictive maintenance
- Reception
- Risk Assessments
- Safety Rules for Contractors
- Security
- Security guarding
- Smoke/heat detectors
- Specifying, tendering and contracts' negotiation
- Sprinkler systems
- Vending
- Waste management
- Work equipment

FM :: Global Overview

The current FM sector is large and complex, comprising a mix of in-house departments, specialist contractors, large multi-service companies, and consortia delivering the full range of design, build, finance and management which means putting a figure on the FM market is no easy task, but with the global outsourced FM market being estimated at approximately US\$845 billion in 2009, FM is an opportunity not to be missed.

What is clear is that the FM profession has come of age. Its practitioners require skill and knowledge. The sector definition continues to expand to include the management of an increasingly broad range of tangible assets, support services and people skills.

The FM industry is comprised of six main service types:

- **Property services** include maintenance of buildings, climate systems, electrical and mechanical services, information technology and communication systems, landscaping, damage control and pest control.
- **Cleaning services** include traditional cleaning of offices, factories, hospitals, transport hubs and specialised cleaning of windows.
- **Security services** include manned guarding and installation and maintenance of electronic surveillance systems. The market for security services is considered fairly consolidated.
- **Catering services** include the operation of canteens and concessions for customers. The market for catering services is considered fairly consolidated.
- **Support services** include the operation of call centres, reception and mail room services within a client's facilities, but exclude temporary staffing services where the provider does not manage the temporary staff.
- **FM services** include such as on-site management of FM, change management, space management and consulting.

Property services are estimated to represent the largest market, accounting for approximately 34% of the market in 2009, followed by cleaning services at 23%, security services at 15%, catering services at 15%, support services at 11% and FM services at 2%.

The penetration rate of outsourcing has increased across the services types and the global outsourcing rate is estimated to be 54% in 2010, up from 52% in 2005.

Historically, the market has grown approximately 6% per year on a global basis from 2001 to 2006, although at a slower pace from 2006 and 2009 due to the global economic downturn. The growth for FM varies by region, with Asia (excluding Japan), Latin America, Middle East and Eastern Europe showing the most promising growth rates, and Western Europe, the Nordics, the Pacific and North America with more moderate growth rates.

Drivers of the decision to outsource include a lack of in-house resources and expertise or a desire to improve service quality and efficiency, reduce costs and manage risks. By outsourcing the customer can focus on their core activities. A decision to outsource will also entail a decision on whether to choose a single service outsourcing model or an integrated services outsourcing model.

Though it varies from market to market, the single service model still remains a dominant choice. However, overall customers' propensity to procure integrated services is clearly increasing as businesses attempt to limit complexity by reducing the number of service suppliers.

The global FM market is perceived to be highly fragmented – though the market is undergoing consolidation as larger providers seek to achieve economic benefits associated with maintaining operational scale and scope at the local, national and international level.

The level of consolidation differs significantly between countries and regions, with the more consolidated market structures typically found in more mature markets. Basic FM, including general cleaning services, may be provided with very limited resources. As a result of these low barriers to entry, it is likely that the market for basic FM will continue to include a large number of smaller operators.

However, within each market there are generally only a few providers that have sufficient resources to provide customers with a full-range of FM and to service larger, multi-location customers and that use more sophisticated and standardised methods in the provision of services.

FM :: The Middle East

The FM market in the Middle East is in the infancy stage when compared to other developed regions such as Europe and North America. This creates an abundance of opportunities, and the sheer size of construction happening is a testimony to the future of FM in the Middle East.

The FM industry in the Middle East is structured into three groups:

- Single service providers
- Bundled service providers
- Integrated FM (IFM) service providers.

In the FM market, great stakes are placed on building owners' knowledge of the potent advantages of outsourcing these services. Management services, when outsourced, allow the end-user to focus more on their core activities. This scenario presents the perfect opportunity for property owners to benefit, especially if they enter into long-term contracts with FM companies.

Multinational companies are setting a benchmark in terms of operations, bringing their facilities on par with international standards. Green building techniques, which involve professional maintenance of buildings are gaining traction and opening up new avenues for FM companies. As most end users lack the in-house expertise to handle professional FM, the scope for the FM market has widened considerably.

The massive growth in the construction of new high-end commercial and residential establishment, along with the aging of existing facilities and building, is also opening up opportunities for high-quality FM services in the Middle East.

FM is to intelligently ensure satisfaction with price and performance by incorporating people, place, process and technology together. To ensure business continuity, and to maximise productivity and profits, a successful organisation depends on the latest FM concepts and techniques as well as using the most efficient processes. A strategic FM can mean the difference between success and failure for an organisation.

Analysis from Frost & Sullivan found that the market earned revenues of US\$78.8 million in 2009 and estimates this to reach US\$96.4 million in 2014 growing at a compound annual growth rate (CAGR) of 4.1 percent. The region's construction industry is due to deliver projects worth US\$500 billion by 2015, providing a huge opportunity for the sector.

The FM market in the GCC region is expected to soar to US\$816 billion within the next 25 years, according to the latest research from Middle East Strategy Advisors (Mesa). UAE will account for an estimated value of US\$679 billion, Saudi Arabia will follow at US\$95 billion and Qatar will be a close third at US\$91 billion, it said.

It is also being seen that there is an increase in government sponsored infrastructure projects, for example in Saudi Arabia over US\$13 billion of construction contracts have been awarded in the Kingdom in Q1 2011 alone, according to the NCB (National Commercial Bank) Construction Contracts Index First Quarter 2011. The construction sector is expected to continue its impressive growth as the Saudi government set forth plans to develop the Kingdom's infrastructure in the 2011 budget.

A new report sponsored by PwC and carried out by Global Construction Perspectives and Oxford Economics predicts growth in global construction will outpace world GDP growth over the next decade. The report, Global Construction 2020, forecasts that global construction will grow by 67% from US\$7.2 trillion to UA\$12 trillion annually by 2020.

The Middle East and North Africa region is expected to outpace this global growth rate. A total of US\$4.3 trillion is forecast to be spent on construction in the region over the next decade, representing growth of 80% to 2020.

Particular emphasis will be placed on social and affordable housing to meet the needs of the growing indigenous populations. The procurement process is also getting sophisticated and many countries within the Middle East have started applying 'Build Operate Transfer' and 'Public Private Partnership' schemes which not only help in financing projects but also ensure the efficient implementation and execution to international standards.

Within the region, growth in construction will be driven by population increases, economic growth, the desire for diversification and, in some cases, preparations for global sporting events, particularly the 2022 World cup in Qatar. Qatar is one of the fastest growing construction markets.

Country	Total Value of Construction Projects* US\$bn	Estimated Life Cycle Cost FM Component** US\$bn	Total Life Cycle*** Cost of Projects US\$bn
UAE	176	704	880
KSA	24	96	120
Qatar	23	92	115
Total	223	892	1,115

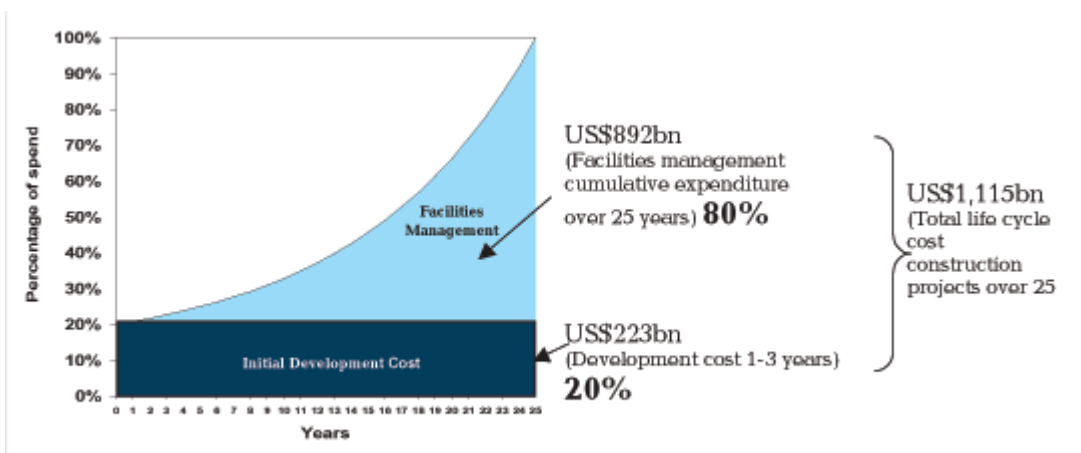
Source: MEED and Middle East Strategy Advisors (MESA) research

* Excludes oil & gas construction projects

** Based on the assumption that the initial investment (development cost) of a development is only 20% of the total money spent across the lifetime of a building; and that facilities management captures the remaining 80% over a 25-year period

*** Over a 25-year period

Excludes existing building, infrastructure and residential communities.



Source: Middle East Strategy Advisors (MESA)

Important facilitators of construction growth in the region are expected to include changes to mortgage laws in Saudi Arabia, driving residential construction, and more private participation in infrastructure investment across the region. However, that recent events in the region may delay the growth in construction in some areas.

Opportunities

The MENA region is likely to continue to be a major source of growth in the global construction market. Demographic factors, economic growth and regional Governments' pursuit of more balanced economies will all be powerful stimuli of construction demand.

The figures are encouraging and compelling as the market for FM in Middle East is mainly driven by the magnitude of construction activities and the growing awareness about the advantages of using FM services. The GCC region generated revenues worth US\$3.5 billion in 2008. In the UAE alone, projects that will be handed over in the next five years will help push the estimated value of the FM industry to around US\$1.4 billion each year over the next 25 years.

Despite the positives, the industry is not without its challenges, particularly in view of the evolving needs of customers. One of the most pressing is the lack of a region-wide awareness about the benefits of these services.

While most multinationals operating in the region, and representing the bulk of customers of most FM companies, are already familiar with the benefits, a large number of end-users and SMEs continue to shy away from investing because they remain unaware or perhaps unconvinced of such long-term incentives.

Most of the industry's target audiences are not aware that management and maintenance costs, including energy, represent up to 80% of the total building life cycle cost, and those related to development accounting for just 20%.

Putting these figures in proper context, a study by the Middle East Strategy Advisors (Mesa) estimates the value of the FM market in the UAE, Saudi Arabia and Qatar to reach US\$892 billion in the next 25 years, based on more than US\$220 billion worth of projects that are under way and being planned over the next five years.

This figure certainly represents a huge savings potential for property owners and developers who have the foresight to invest in long-term FM solutions.

Multinational companies are setting a benchmark in terms of operations, bringing their facilities on par with international standards. Green building techniques, which involve professional maintenance of buildings are gaining traction and opening up new avenues for FM companies. As most end users lack the in-house expertise to handle professional FM, the scope for the FM market has widened.

For FM companies entering the market the Mesa study suggests that tapping even a modest 5 per cent of this would translate to total revenues exceeding \$44 billion in 25 years, with the UAE alone accounting for up to \$1.4 billion based on the number of projects being released within the next five years.

There are a number of growth inhibitors that FM companies should beware including having to deal with the effects of inflation and the transfer of risk to a third party. Long-term contracts will naturally allow property owners to get more value and allow them to pass on any inflationary pressure to the FM provider.

Another key area of concern for the industry is to ensure all FM companies are able to implement best practices. Regulations laid down by the government, Real Estate Regulatory Agency in collaboration with Middle East FM Association (MEFMA) (see section on STRATA Law) have been an important step towards promoting quality and excellence among all players. In order to stay ahead of the curve and be successful FM companies will have to implement these best practices and adhere to regulations.

Meanwhile, the Middle East is facing the challenge of dipping life span of buildings due to climatic conditions and negligible maintenance. In addition, there is an increased wastage of resources such as power and water which is attributed to poor management of facilities.

Governments in the region cannot afford to let this trend continue as this will lead to huge monetary losses because of ill-managed facilities. Much of this wastage can be limited, provided the facilities are managed professionally adopting a skilled workforce and efficient technology.

Adapting to local market conditions and providing competitive pricing will be the special challenge for multinational companies that are keen on entering this arena. Considering the overall scenario, FM companies should unleash industry best practices to stay ahead in the market. FM companies should remain flexible in order to provide customized services to cater to the evolving needs of clients. Adopting advanced technology will help FM companies to add value based service and sign more lucrative contracts.

Outlook

Facilities management is a vital strategic discipline because it 'translates' the high-level, strategic change required by senior decision makers into day-to-day reality for people in their work or living space.

Successful organisations in future will approach FM as an integral part of their strategic plan. Those organisations that treat FM as a 'commodity overhead' will be at a significant strategic disadvantage.

The UAE has been the market leader in terms of the volume of business of the FM industry, but clearly, there is a shift in focus towards Saudi Arabia and Qatar. Both countries offer promising business opportunities that were overshadowed by the construction boom in Dubai and other emirates of UAE, until the recent economic crisis.

However, the UAE still holds a strong position in terms of lucrative business prospects mainly due to the vast developmental activities that took place over the last decade. All the showcase construction projects completed in UAE now demands FM in order to maintain the buildings.

Middle East end-users, mainly customers who sought single services, are increasingly price conscious. Building owners are becoming highly demanding due to inflationary pressures. This increases the pressure on the service providers who in turn have to reduce costs to be on par with competition. With rising inflation, FM companies face difficulties in managing costs.

The cost of labour is a vital component that has a major influence on the price of services. With rapidly increasing labour costs, FM companies are fighting to balance the needs of the customers and their costs.

Pricing of services is the key to success in the Middle East market. There is stiff competition with respect to prices quoted for services. Competitive pricing needs careful planning as this might affect returns in the long term. Pricing helps beat competition, but this demands caution.

Energy conservation and pragmatic solutions that reduce energy costs are more demanded by end-users. Big developments present a higher carbon footprint, putting pressure on developers to balance carbon emissions during the life-cycle of the building. FM companies are expected to provide this solution to developers and owners, in order to obtain better business opportunities and sustain a challenging market.

The FM market is expected to grow rapidly as more clients understand the ease of doing business with FM providers under a single contract. This will also help bundled services to grow.

There is a large cluster of companies that provide single services and specialise in the same. Most single service companies are beginning to partner with IFM providers in order to have safe order books. However, the demand for single services still remains strong as end users value the experience and professional service of these single service companies.

According to research there are more than 30 domestic and international companies that provide FM services in the GCC and more than 50 service providers that operate in the unorganised sector and will continue to contribute to the FM market growth.

Meanwhile, the FM market in the Middle East is attracting many new entrants and most of these are domestic conglomerates that are expanding their services portfolio. However, that the entry of new companies has not changed the course of competition, as the market is in the early stages of development leaving room for many participants.

Competition is not deterring any company from growing, but it is changing the business models, as more companies are aware of the fact that they should have a leading edge over the rest to sustain long-term competition.

FM :: Key steps to the success of FM in the Middle East

The recent growth in the FM industry in the region has been influenced partly by increasing awareness of individuals and organisations about the strategic importance of FM services. The introductions of cost-effective, personalised and integrated solutions are crucial factors that have helped accelerate the widespread adoption of FM.

With the industry increasingly gaining traction and energetically expanding its regional market base, the next big challenge is for industry players to sustain the momentum and keep customers satisfied with service levels.

Like any other, the FM sector will benefit greatly from training initiatives as these foster a culture of innovation and excellence. These should be actively pursued to further strengthen awareness levels of the public and to encourage them to actively contribute in the proper upkeep of facilities and assets.

Understanding strategic values of FM services: Strategy is about looking upwards and outwards, rather than within. It's about imagining what the future looks like for your organisation, your clients, employees and other stakeholders.

Understanding strategy and business objectives: A FM professional can't understand what they contribute in terms of strategic value until they are clear about the overall strategy and objectives, and how facilities management makes an impact on these.

Creating a 'one team approach' with service partners: It's difficult to try and achieve everything alone, so it's vital to engage with all service partners. Not only do they represent a team, they can also bring knowledge and experience. It is essential to build a collaborative environment where every member's strengths and talents are utilised and appreciated.

FMs are beginning to achieve a truly integrated workplace resulting in part from their success at building a network of collaborative internal and external suppliers. The net result will be a greater understanding that FM is a strategic source of business value, not merely a drain on costs.

Know the audience: Who are the key influencers in an organisation? They may not necessarily be the person who is the greatest fan of FM, so it's up to the team to educate them, give them the evidence they need to be persuaded and to persuade others. Consider the individual, what's important to them and structure messages accordingly.

Using a common language to communicate: In today's FM world, FM professionals are taking on the new role of communicator. Successful FMs are harnessing the power of their network to influence and leverage the power of key internal and external stakeholders. Through successful management of these networks. Consistent communications is vital in developing a well-functioning team and gaining recognition within the organisation. The key is 'consistency'. Outline the objectives of the organisation and how that impacts on FM delivery; detail the team objectives and the specific roles of each individual. Then regularly repeat and update as necessary so that everyone is pulling in the same direction.

Broader plan: Developers and contractors must also have a much broader development plan for their projects. It is no longer sufficient to construct a building and then hire an FM company to try to meet green requirements and other FM regulations. Instead, they must seek to develop training to ensure a genuinely smooth transition during handover and guarantee higher satisfaction levels for tenants.

Engagement: Engaging tenants and staff through activities such as surveys, seminars and focus groups is equally important to ensure optimal results in the delivery of FM services. Occupants' behaviour and their direct or indirect participation in such activities have a substantial impact on the sustainability and enhanced life cycle of the buildings and facilities. It could likewise cultivate a healthy interaction between FM managers and the occupants, which can only further improve co-operation of both towards developing a genuinely sustainable FM solution. On the other hand, it is important for FM companies to engage employees in interaction and joint activities that will harness the ideas and specialised expertise of each member. Organising activities that are perceived to be beneficial to employees is certainly a very healthy way of strengthening their loyalty and encouraging them to maintain their enthusiasm and eagerness.

FM :: Challenges in the Middle East

One of the main challenges of the FM industry is the low awareness of the sector. International firms that operate out of the Middle East provide a strong customer base, but many end-user sectors have still not opened up to the concept of outsourcing FM services.

Knowing the difference between value and cost is important. Focus needs to be shifted to value that can be added to the organisation rather than just looking primarily at cost considerations. For too many years FM teams have been seen as a necessary overhead rather than a value adding function. Facility management skills are broad and transferrable to many other business disciplines and progressive organisations recognise and benefit from this.

Sustainability and environmental matters are also becoming increasingly important as facility managers work within a more regulated framework and have to find innovative ways to improve their buildings' performance. Organisations want to be greener but this comes at a cost typically.

Spreading awareness about the need for outsourcing FM services to professionals is gradually gaining importance and is expected to bring in an upward trend in the business in the Middle East. The other challenge has been overcoming inflationary pressures by the FM companies which has been the biggest challenge faced by FM service providers in the region.

Almost all countries in the Middle East face high inflation and companies struggle to contain costs. This is especially true in the case of companies that sign long-term contracts. Though there is an option of including a price escalation clause in the agreement signed, most end users are not open to this, making it tough for FM firms to retain their margins.

Most FM companies face an uphill task of workforce management. Labour-intensive services such as soft services including manned security, catering, landscaping and janitorial services demand higher number of unskilled staff. Such services attract many staff from other Asian countries, which necessitate the framing or adoption of labour laws that demand good working conditions and accommodation. This further complicates the job of FM companies that hire them, as they often come under the scan of labour laws and other immigration policies. However, efficient management of workforce provides the input for successful delivery of agreements and retention of labour.

An increasing challenge for FM professionals is keeping abreast of changing technology (communications, Building Information Modelling (BIM), Integrated Workplace Management Systems (IWMS)). As a result FM professionals must work closely with clients to anticipate changes; build the technical skills expertise of building operations personnel; and use technology to attract young professionals to the facility management professional role as well as to facilitate data and information sharing.

Other challenges have been the life-cycle cost of a building that is very high. Professional management of buildings increases their life-cycle and helps in efficiently reducing the maintenance costs involved.

Governments in the Middle East have invested heavily into the infrastructure and construction of public spaces such as airports and shopping malls. Managing these structures and simultaneously ensuring safety is of paramount importance. With a growing need to efficiently manage concrete assets, FM is becoming a popular concept in the region.

Reduction in energy consumption is the future for most activities in this region. Future buildings in the Middle East are expected to be highly energy efficient.

With improved efficiency in FM, it will be easier for building owners to cut down their energy costs. Further, future buildings are likely to accept the concept of outsourced FM as a default inclusion in the lifecycle of a building. The influx of expatriates and the need to maintain international standards in buildings is the driving trend. High-rise structures deserve extra care in order to bring in efficiency and safety.

FM :: Growth drivers and dynamics

The growth of the global market for FM is driven by a number of factors although varying by market. Companies in the FM industry that are able to take advantage of these factors may be able to grow in excess of the market growth.

Underlying market growth: The growth in the FM market is generally impacted by the underlying economic growth, such as growth in the gross domestic product. For example, an increase in office/factory floor space and increase in employment levels will drive FM growth as there will be an increase in the demand for services such as cleaning and security to cover the increased facility size and catering services for the increased number of employees.

However, the FM industry is normally considered to be less sensitive to economic cycles than a number of other industries as demand among customers for cleaning and other FM in order to maintain their facilities and operate their businesses is relatively stable despite market conditions.

Outsourcing trend: The continued increase in outsourcing of FM is a main driver of growth in the industry. The penetration rate of outsourcing has increased across the services lines and the global outsourcing rate is estimated to be 54% in 2010, up from 52% in 2005. The penetration of outsourcing within FM is believed to be driven primarily by providing customers with cost efficiency, ability to focus on core businesses, convenience and higher quality.

Prices: The ability to pass on wage increases to customers through price increases is an important component of growth in the industry. Price increases are expected to be slightly below the level of inflation, and consistent with the recent history. Prices of services are influenced by a variety of factors, including changes in the minimum wage requirements, labour union contracts, the lifetime of contracts and price adjustment clauses linked to an inflation index or other appropriate indexes.

Integrated FM trend: The market is gradually shifting towards organisations opting for an integrated FM approach to outsourcing and consequently the integrated FM market will continue to outgrow the general FM market. Integrated FM is defined as the provision of multiple FM managed on-site by the provider through a single point of contact.

Although a relatively new concept in many markets, integrated FM is gaining an increasingly larger share of the greater FM market. As integrated FM is a relatively new trend, its penetration rate remains low but is expected to increase leading to higher projected revenue growth rates than the growth rate of the general FM market. The main reason for choosing integrated FM as delivery type is the single point of contact, related convenience and the cost efficiencies and financial certainty for the customer.

Global contracts / centralised procurement: Procurement of international contracts is still relatively rare within the FM market. However, large multi-national companies with a global presence are increasingly centralising procurement and operations of FM. This trend is leading to an increasing demand that only a few FM providers are able to capitalise on due to the local or to some extent regional limitations of most providers. In addition, multi-national customers are even more inclined to move into an integrated FM delivery than the general market.

Technology: End-users are increasingly demanding advanced technology due to security and health concerns. Similar to other service sectors, software has permeated into the FM industry, as well. Adoption of technology helps the facility manager achieve better efficiency. Computer-aided FM (CAFM) and computerised maintenance management system (CMMS) are popular among end-users who are looking for high-end solutions, especially in the commercial and banking sectors.

Comprehensive service offerings from a single company help end-users to settle for multiple services under a single contract. FM companies will need to improve their capabilities and offer more services in their palette, which can potentially attract more customers. In addition, the multitude of services gives them better flexibility in the eyes of customers and improves their chances of winning orders.

Management: Long-term contracts are gaining higher importance among end-users and there is a gradual and positive shift in their preferences for long-term contracts.

However, managing long-term contracts is difficult for FM companies, as they increase the risk of inflation. With rising costs, long-term contracts offer very little room for FM firms to manoeuvre the cost range. Companies that exercise efficient management of long-term contracts plan their costs in an effective manner and manage their cost bracket in a prudent manner to achieve success.

FM :: Top 10 Trends

In April 2011, the International FM Association (IFMA) released the 2011 research report “FM Forecast – Exploring the Current Trends and Future Outlook for FM”, which IFMA President and CEO Tony Keane, CAE, said “presents what we see as the critical issues facing the profession. It not only serves a needed strategic planning purpose, but also highlights areas the industry needs to pay attention to. With advances in technology and the growing recognition of sustainable practices, being aware of the trends in this report is critical to the success of the FM professional of the future.”

Globally, the FM profession continues to mature and evolve. Facility managers today are expected to understand their company’s core business and contribute to the bottom line — not only by reducing facility costs, but also by improving the productivity, revenue generating capacity and image of their organizations.

To help prepare its members and the profession for the future, IFMA periodically conducts a trend forecasting workshop with a panel of industry experts to identify the emerging trends and issues that will influence FM in the coming years. Broader industry research is also conducted throughout the year and, taken together, results from the workshop and research initiatives form the basis of this report.

The 2011 “FM Forecast” can help facility practitioners succeed in their careers by identifying the industry patterns to look for, the skill sets to work on and the places to allocate their resources. It can also help FM departments chart a course for the future and align FM with corporate strategy.

The top ten trends are listed below:

1. **Sustainability** continues to grow in importance and prominence worldwide. Organizations have begun to incorporate it into business goals and culture, and within the profession, it has moved from an emphasis primarily for new construction to influencing existing building operations.
2. **Complex building systems and controls** increasingly offer opportunities and challenges for the profession. The industry can leverage new technologies to better manage facilities, but it also needs to ensure adequate training is in place to educate practitioners on new systems.
3. **Older buildings** - FM faces problems stemming from the aging building stock — difficulties compounded by the global recession. As facilities and mechanical systems reach and exceed their expected operating lives, significant issues of “repair or replace” must be addressed.
4. **Disaster preparation** - Facility managers play a critical role in business continuity after a disrupting event, not only by crafting and implementing the prepared response plan, but also by serving as role models for the organization in emergency preparedness and business continuity planning.
5. **Complex information** - The increasing quantity and complexity of data available to facility managers through new reporting protocols poses challenges and opportunities for the profession. More facility departments have added the ability to convert raw data into usable and meaningful information that fosters informed decision making.
6. **Finding top talent** in FM is gaining greater importance. Recognizing that FM is often not the first choice of today’s new graduates, the profession will need to increase its branding and outreach.
7. **Marketing** - There is a growing desire to elevate FM to improve the recognition and perceived value of the profession within the corporate hierarchy. Many have achieved success in this arena through careful alignment with their organization’s mission and by emphasizing facility professionals’ role as managers of significant assets and enablers of the organization’s mission, vision and values.
8. **Business acumen** - Increasingly, organizations are expanding their expectations of FM to include both technical and business acumen, which drives the need for an evolving skill set for those in the profession. While the technical aspects are generally well understood, the increased focus on business acumen will require facility professionals to think and act strategically and to communicate their positions in the language of the C-suite.
9. **Healthy facilities** - There is a growing recognition that FM contributes to the health and well being of building occupants, thereby benefiting efficiency, productivity and profitability — key pillars of an organization’s bottom line.
10. **Changing work styles** significantly affect both occupant behaviour and the vacancy rate of buildings, which affects how buildings must operate. FM increasingly faces challenges posed by open work plan arrangements, differing hours of operation, and varying occupancy rates and densities — all of which impact power use and other considerations.

These trends do not stand alone as solitary influences on the profession, but rather bear strong interconnections. The most successful facility professionals will be those that proactively meet the challenges posed by these trends and lead the way for their organizations and the profession as a whole.

FM :: New Technologies

Technology can be the key to efficiency, productivity and savings or it can result in failed projects, lost time and excessive costs. The FM professional must keep an eye on new technologies because the results are real and significant.

Detailed is a look at some of the significant new technologies that will be shaping the selection process for facility managers in the future.

Alternative Energy

Of all the alternative energy sources available, solar has recently emerged as the one generating the most attention within the FM industry, even if it is not yet the one generating the most energy. Solar resources are most underutilized resources in the Middle East in general, and in the Arab world in particular despite the acute shortages in electricity and in potable water. With few exceptions in using solar energy for water heating in handful of countries, photovoltaic systems are virtually nonexistence, and in few countries, particularly in the GCC, local municipalities provide zero incentive for the deployment of solar system, and prohibit connecting photovoltaic to the grid in any shape or form despite the availability of more than 3,697 sunny hours per annum. Every year, 630,000 terawatt hours in the form of solar energy falls unused on the deserts of the so-called MENA states of the Middle East and North Africa.

COOL Roofs

Cool roofing is a hot topic in international FM circles. A growing number of non-governmental organizations (NGOs)—from the International Green Construction Code (IGCC) to the Cool Roof Rating Council (CRRC) and the U.S. Green Building Council's LEED program—are also promoting and encouraging green building practices, including cool roofing. So, what's so hot about cool roofs?

Cool roofs reflect the sun's rays and reduce what scientists call the Urban Heat Island Effect. This happens when dark surfaces absorb sunlight and radiate heat. When enough dark roofs are converted to cool roofs, energy consumption decreases, air pollution is reduced significantly, and summer in the city becomes cooler and more comfortable. When those savings are multiplied over many buildings, peak energy demand is reduced, which can also lower the risk of rolling brownouts or blackouts. This also means utility bills can be reduced when air conditioners aren't working as hard.

Apps

Communication between mobile devices used in facility management sometimes faces obstacles, but an emerging web language may help bridge the gap.

Technology, it seems, transforms life; and subsequently, life transforms technology. Today, the onslaught of smart phones and tablet computers is managing these tasks in an increasingly sophisticated way through their many applications, or "apps." However, managing all of this technology can be a bit of a chore. But once mastered, these apps can be a facility manager's best friend.

This advancement in technology can certainly aid facility managers who want to use any form of office management tool that streamlines and expedites operation processes in their buildings. Operational apps can deliver content and action needed by all stakeholders. They solve the problem of reaching out to staff, vendors, or building occupants, for example, and there is no problem sending contracts, schematics, and much more with the right app.

Design

Institutional memory is an essential component in sustainable system management. As regulations require buildings to be more resource efficient and less expensive to operate, the role of the facility manager (fm) has become increasingly vital. More than ever, it falls upon facility managers to ensure that building systems, whether passive or high tech, operate within guidelines. Thus, it is often the FM professional who must embody the "institutional memory" of the building as it pertains to management and maintenance of systems and sustainability initiatives.

Facility managers in passive buildings require a greater understanding of building design features, intended use, and system integration. Facility managers must prevent problems before they happen, educate occupants, and manage change to preserve system effectiveness.

HVAC

As energy efficiency strategies get “smarter,” HVAC systems are one area of opportunity for facility managers.

While the building industry has been challenged by the economy, facility managers and other professionals are now very open to hearing messages about making their buildings more energy efficient and sustainable. As an example, roughly 98% of construction dollars in the United States are spent on existing buildings, so there's a rich opportunity to improve the energy efficiency of the existing building stock. It is beneficial for the value of integrated design to be widely recognized by design professionals, contractors, owners and developers, and that approach plays a key role as facility managers strive to achieve high performance green buildings while containing first costs.

Project Management

New building modelling software borrows from gaming technology to produce spectacular presentations.

The FM world is marked by constant change. Handling these changes in a manner that satisfies occupants, CEOs, and various authorities is the ultimate goal of effective management practices. Speed of execution, often based on willing compliance from all parties, is a key factor in successful execution. Technology can abet this process, but even the smartest software may be no match for surly employees or demanding business owners. Design professionals using conventional technology platforms can easily share their experience to help their FM clients understand the 3D qualities of buildings, mechanical systems, and interiors. This technology can also create a virtual experience of AutoCAD, 3ds Max, or Google SketchUp Pro models.

Social Media

Because it's free, effective and virtually everyone has at least dipped their toe in the water. Social media channels offer an innovative and efficient communications platform. The use of these tools will enhance customer service capabilities, and perception.

FM :: Strata Law and the effects on FM in the UAE

On December 10, 2007, Dubai issued Law 07 of 2007 known as the Strata Law which is to regulate the ownership issues of jointly owned properties in the emirate.

This dynamic legislation laid the elementary outline for a registration framework of all jointly-owned properties, typically made up of individual units and the common areas meant for collective use by all of the unit owners in a development.

The Strata Law is expected to bring down the cost of maintenance drastically by removing some intermediaries in the chain of service delivery. It sets the ground for the unit owners to directly negotiate and set the terms and conditions one-on-one with the service providers to their buildings, rather than using FM (FM) companies.

Owners' Association (OA) management companies will now assist the Associations to identify and choose the right service-providers and help Association Boards in the tendering process. The Jointly-Owned Property Law takes the control of the building from the developer and their facilities manager and puts it firmly in the hands of the owners. No longer will developers direct the owners on how their buildings will be run, by whom and how much this will cost.

No longer will Facilities Managers chosen by developers direct the price of services. The Owners' Association committees will now take all decisions.

Jointly-owned property law shifts onus onto owners

Under the Strata Law, common areas are defined a parts of a property designated for common use by unit owners and occupiers and are shown on a site plan for that property registered with the Land Department. The common areas typically include elevators, lobbies and centrally located walkways, as well as gymnasiums, gardens, pools and major plant.

In May 2010, Real Estate Regulatory Agency (RERA), Land Department, Government of Dubai issued four separate directions which describe the regulations implementing the Strata Law. These directions are commonly referred to as the Strata regulations and aim to clarify the relationship between individual unit owners, developers and OA managers in jointly owned properties. They call for the creation of an Owners' Association, which is an elected representative body of all unit owners. This must be established in accordance with a prescribed constitution and related guidelines stipulated in the regulations. Previously, developers were both owners and in charge of maintaining these common areas. Now the owners' association is responsible for their management, operation and maintenance.

The principle of the Strata Law for service providers is simple; the contracts will have to be directly handled with the owners' association as management companies will not be able to sub-contract anymore.

This should open the market a little more for new opportunities as owners' associations will look to a wider group of companies than the current management company's existing supply chain. The focus for some will be purely on driving costs down and the consequence of this will be very quickly felt by the occupiers as quality will suffer, but with all such learning curves, the owners' association will come to realize the critical relationship between price and quality.

The key factor is to be able to deliver good quality services at reasonable prices and to be able to interact with the owners' association on a professional level to enable them to have the confidence to deal directly with the supply chain and that will be a step forward for the industry. This will lead to cutting out the intermediate management of price percentages and seeing the true prices of service deliverables.

Why is the implementation of the Strata Law important to the property market?

The implementation of a fully operational strata regime in Dubai is extremely important to the property market for a number of reasons. The most important of these is that the Strata Law provides a legal framework that enables a building with multiple ownership to be subdivided into units and common areas in a way that is consistent with other leading world markets.

This includes providing a consistent method for the measurement of units, ensuring that owners and investors can compare "apples with apples" when deciding between units within different developments. In addition, the Strata Law provides a further unique benefit in that it introduces a structure to deal with the

management and maintenance of the common areas to ensure that the owners' interests are protected at all times.

The legal story

The Strata regulations require that each jointly -owned property retains a detailed Jointly Owned Property (JOP) Declaration document registered with the Land Department that reflects the unique details and characteristics of the property. The JOP includes the community rules, a list of every unit, a duly executed site plan and an explanation of the calculation method of each unit owner's common area entitlement. The Strata regulations made clear that a declaration for applicable property developments constructed and occupied as on April 13, 2007 must be officially filed with the Land Department, along with an application for the formation of an owners' association, no later than October 13, 2010 or by the date which is thirty days after the receipt of a notice from three or more owners, whichever was earlier.

Very few buildings have been formally registered yet in Dubai because there are complex processes involving extraneous issues such as preparing and registering title for individual units before the process can commence.

Simply put, as per the new regulations, each of the subdivided units belongs to the owner, and all that is left, i.e., the land outside one's premises – the lobby, lift area, garden, drive-ways, etc. which until now have been the retained property of the developer now transfer to the joint ownership of all owners – hence the term Jointly Owned Property.

Previously, the developer would then contract with the FM companies to manage and maintain these areas. Now the contract will be between the owners' association and service providers directly. The existing supply agreements can remain for a period of up to three years after which they must be voted on by their respective owners' association."

According to the regulations, the penalty for not filing a proper declaration and related documents, including a prescribed notice and a disclosure statement to each unit purchaser, by October 13 are severe. The Land Department has the right to refuse to register or transfer the property in question. In applicable developments where service charges were collected by the developer prior to the formation of an owners' association, an audit must be completed, and any reconciled balance must be paid to the owners' association upon receipt of the audit. Further, any amounts that were not properly expended must be paid to the owners association within 21 days of being directed by the Land Department.

The Strata regulations state that all of this must occur within three months of the formation of the association.

In the long run, such reformation will provide better living conditions, service levels and supple investment opportunities. But on the leasehold side, the law may not impact much. Over the course of time, the FM shall have one of the vital roles to play in the process.

This law does make the FM companies vulnerable in a way. The biggest effect on the FM industry is that the people are in control of their FM contractors. If FM contractors do not understand good service delivery, they will be voted away. It should result in an increase in service and quality standards. Owners expect staff that appear at work in a clean, presentable uniform, and FM companies will now have to provide more effective staff training, and service and language skills. A person who is trained and educated well for the job is definitely preferred to an unskilled person providing the service. We need trained and conscientious people in the lobbies of apartments.

RERA's new guidelines ensure that the agreement has to be directly between the owners' associations and the suppliers. Further, Middle East FM Association (MEFMA) will provide full support and co-operation to improve facilities service providers' standard of deliverables.

The Strata Law appears to be a double-edged sword. However, it is one which works to the advantage of the one who holds it. This is subject to the fact that it is handled diligently and targeted at improving service levels and prolonging the life of the assets while cutting down costs simultaneously.

Associations

- AFRICA - South Africa - safma.co.za
- American Institute of Architects - www.aia.org/index.htm
- American Society of Civil Engineers - www.asce.org/
- ARSEG- www.arseg.asso.fr
- ASSOCIAÇÃO BRASILEIRA DE FACILITIES - www.abrafac.org.br
- Associated Builders and Contractors - www.abc.org
- Associated General Contractors of America - www.agc.org
- Association of Electrical Contractors Ireland (AECI) - www.aeci.ie
- British Blind & Shutter Association - www.bbsa.org.uk
- British Cement Association - www.cementindustry.co.uk
- British Institute of FM: www.bifm.org.uk
- Canadian Construction Association - www.cca-acc.com
- Chartered Institute of Architectural Technologists - www.ciat.org.uk
- Chartered Institution of Building Services Engineers - www.cibse.org
- Confederation of International Contractors Associations - www.cica.net
- Construction Confederation - www.thecc.org.uk
- Construction Employers Federation - www.cefni.co.uk/
- Construction Industry Council - www.cic.org.uk
- Construction Industry Federation – www.cif.ie
- Construction Industry Training Board - www.citbni.org.uk/
- Construction Skills Council - www.constructionskills.net
- European Builders Confederation - www.fmb.org.uk
- European Construction Industry Federation - www.fiec.org
- European Construction Institute - www.eci-online.org
- European FM Network - www.eurofm.org
- European Tools Committee - www.ceo-tools.com
- European Union of Developers and House Builders - www.uepc.org
- FM Association of Australia Ltd - www.fma.com.au
- Federation of Master Builders - www.fmb.org.uk/
- Hungarian FM Society - www.hfms.org.hu
- Institute of Civil Engineers - www.ice.org.uk
- Institute of Construction Management - www.the-icm.com
- Institution of Civil Engineers - www.ice-northernireland.org.uk
- Institution of Structural Engineers - www.istructe.org
- International Construction Project Management Association - www.icpma.net/
- International FM Association - www.ifma.org
- International FM Institute India - www.ifmiindia.org
- MEFMA - www.mefma.org
- National Association of Home Builders - www.nahb.org/
- National Federation of Builders - www.builders.org.uk
- National Society of Professional Engineers - www.nspe.org/index.html
- Royal Institute of British Architects - www.architecture.com
- Royal Institute of Chartered Surveyors - www.rics.org
- Royal Society of Ulster Architects - www.rsua.org.uk
- Steel Construction Institute - www.steel-sci.org



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Published: October 2011

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