

Facilities Management Services Market in India 2013

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Abstracts

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India woke up to facilities management services when companies started outsourcing their non-core activities to different vendors. Non-core services would refer to activities in the likes of cleaning, maintenance, house keeping, electrical and plumbing and other multifarious issues. Biggies would generally outsource these activities to vendors as an initiative for cost cutting move. Facilities management comprises a wide range of services that are common to all organizations. Presently, facilities management has widened its reach to every infrastructural facility that requires maintenance including shopping malls, airports, hospitals, hotels, metro rail and others. With the passage of time facilities management is expected to experience robust growth riding on the infrastructural developments in the country.

The report begins with a snapshot of macro-economic indicators in India. It proceeds towards giving a brief introduction to the term facilities management and its definition. It also provides with the categorization of the broad types of services in facilities management along with a break-up of the same in India. The introduction section ends with an overview of the diverse applications of facilities management services. This section gets followed with an overview section which throws light on both the global as well as the Indian market for facilities management services. The Indian market overview is tagged with a brief description of the market along with its market size and its growth rate. This is followed with a geographic distribution and a supply chain that makes up the sector. The cost break-up helps to analyze the different heads that are counted when end product (service in this case) is finally rendered.

The following section deals with the major types of contracts that are generally processed in this sector. Brief descriptions of the same help to understand the flowchart of the activities and the contract segmentation throws light on which contracts have

more takers and how the sector usually works.

An analysis of the drivers explains the factors for growth of the industry that include boom in real estate, rise in infrastructural development, growth in retail sector, growth of hospitality sector and improving healthcare scenario. A strong growth in real estate sector translates into immense potential for facilities management services as residential and commercial properties call forth facilities management services such as housekeeping, security, cleaning, engineering, electrical and mechanical services. Infrastructural facilities namely airports, roads, railways, metro rail also ask for facilities management services as these units look for constant maintenance. Growth in retail sector is considered to be another area which has fuelled the growth for facilities management services as expansion in organized retailing formats like malls, supermarkets call for maintenance. Hospitality is hailed as yet another revenue generating segment for facilities management services as hotels and eateries compartmentalize a significant portion of their costs for their upkeep and maintenance. Finally, hospitals and healthcare are deemed as a formidable domain involving facilities management since it represents cleanliness and growth of whose translates into higher requirement for facilities management services. Though there are many drivers that help the sector to grow, yet there are certain hindrances that pose as challenges for the same namely shortage of manpower and large unorganized segment.

The major trends identified in the sector include standardization of procedures, facilities management as a stream of study, mechanization of services, project management and general contracting services continuing to evolve and investments and M&A activity in facilities management sector.

The following section deals with the industry association that defines the sector in India and deliberates on the general overview, membership and benefits of the same.

The competitive landscape section begins with the Porter's Five Forces Analysis, illustrating the competitive rivalry, bargaining power of suppliers and buyers and threat of new entrants and substitutes. The section includes competitive benchmarking of the top players operating in the Indian facilities management services market. The report also features brief profiles of major domestic and foreign players in the market and a snapshot of their corporation, financial performance along with the key financial ratios, business highlights, their product portfolio and SWOT analysis, thus providing an insight into the existing competitive scenario.

The report concludes with a section on strategic recommendations which comprises an

analysis of the growth strategies for the facilities management services market in India.

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