

INDUSTRY ATTRACTIVENESS OF OUTSOURCED FACILITIES MANAGEMENT SERVICES IN SRI LANKA

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ABSTRACT

Buildings should be habitable, safe, durable, energy efficient and adaptive to use though it is expensive to manage. The specialized team of Facilities Management (FM) is thus invited to create a comfort built environment that strongly supports the core business of the organization. The emergent trend of outsourcing FM services has become widespread topic in the field of built environment though it is relatively new to the Sri Lankan context. Hence, this study aims to examine the attractiveness of the market for 'FM services' in Sri Lanka as a primary step. Porter's five forces analysis was developed at the line-of-business industry level to analyse the existing market. A comprehensive literature review was carried out on a broader perspective with the purpose of getting familiarise with the research phenomena. In order to examine the attractiveness of the outsourced FM market two FM professionals; one from an International FM company and the other from a Local FM company, employed at the strategic level were interviewed. The research findings revealed that the market for FM services in Sri Lanka is long been considered as a niche market with a slower growth and is still in its infancy. Two companies, a local and a global company are dominating in the industry. The Porter's five forces indicated that average bargaining power of client; less bargain power of suppliers; less substitutes; lower level competition thus there are few barriers to enter the market. However, it is clear that the boundaries of the market have not been defined yet; hence the new entrants have the freedom to define their own market share. This study urges to define the market for outsourced FM services and further, FM companies can get the benefit of this analysis in order to formulate successful business strategies to enter and sustain in the market.

Keywords: Market Competition; Outsourced Facilities Management; Porter's Five Forces.

1. INTRODUCTION

The ever-increasing competition for new construction works, increased number of aged buildings and the changing need of building occupants have created a vacuum for efficient and effective management of the built environment. Buildings' owners or users are hunting for favourable solutions of lower operational costs and less risks through effective and efficient management of building related support services, without compromising their business performance (Shohet and Lavy, 2010). Thus, the buildings' owners used to delegate or outsourced their building management operations to a specialised Facilities Management (FM) team. The practice of outsourcing FM services has been encouraged mainly by the promise of getting better service at lower costs compared to producing the services in in-house (Ventovuori and Lehtonen, 2006). It is therefore a massive demand for the outsourced FM industry has been created and it has been gradually broadening its capabilities with a rapid growth around the world. The market for outsourced FM services is large and growing, estimated at more than \$500 billion globally. The market is segmented by provision of services to include single service (65% of the global market), bundled services (23%), and Integrated Facilities Management (IFM) service (12%) (Little, 2016). The market for outsourcing bundled and Total Facilities Management services were valued at just over £18.5 billion in 2013 in UK (AMA Research, 2016). Jensen (2010) report cited that €53 billion for the total potential FM market in the five Nordic countries. The Swedish, Finland, Norway, and Denmark

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FM market was €3 billion, €2 billion, €9 billion, €8 billion, and €0.7 billion respectively. Tan *et al.*, (2014) mentioned that the building maintenance is becoming a major market in Hong Kong due to the declining investment in new construction projects, investment in maintenance and repair work in recent years in most developed countries.

According to Raghunathan and Bera (2014), the concept of outsourcing FM is at its emerging stage in Sri Lanka. There is a slight growing trend towards outsourcing FM services over the traditional in-house FM departments in Sri Lankan business organisations. Numbers of local and global FM companies are evolving in the industry. Some of the companies have survived in the market while some companies have retreated and some more companies are aiming to establish. The recent developments in FM industry have heightened the need for analysing FM outsourced market in Sri Lanka which has not paid attention by the recent researchers yet. The study is therefore aims to assess the prevailing competitiveness of FM outsourced industry in Sri Lanka to identify whether the outsourced FM industry is attractive or unattractive to invest.

2. LITERATURE REVIEW

This section explores the relevant literature in the research arena with major focus is given to four areas; FM in general, FM in a business context, FM market in Sri Lanka and finally Porter's five forces theory.

2.1. FACILITIES MANAGEMENT

Facilities Management is a profession that has ascended as a significant proponent in the built environment. According to Alexander (2003), FM entails the integration of people, technology, and support services to achieve an organization's mission. Wiggins (2010) defined FM as a management function concerning three interrelated elements of business, i.e. premises, support services and information technology. FM covers an extremely wide field of activities including physical issues of built space, services, technology, maintenance, modification and adaptation; the human and business concerns of facility purpose, function and use, security, safety, comfort and environmental health; it covers the financial issues of property investment, asset value, the costs and benefits of occupancy (Nutt, 1999). Followed by Nutt (2000) revealed the primary function of FM as the resource management, at strategic and operational levels of support. The same report stated that the management of financial resources, human resources, physical resources, and the management of the resources of information and knowledge identified as the generic type of resources that are central to the FM functions. Thus, FM is an integrated approach of maintaining, improving, and adapting the buildings of an organisation in order to create an environment that strongly supports the primary objectives of the organisation (Barrett and Baldry, 1995).

There are common themes and approaches to FM including 'outsource', 'in-house' or 'partial outsource or in-house', regardless of the size and location of buildings (Atkin and Brooks, 2009). The arrangements of FM functions may relate to the particular personality, needs, circumstance and environment of the organisation at the time (Chotipanich, 2004). An effective FM encompasses multiple activities under various disciplines, combine resources, and it is vital to the success of any organization (Noor and Pitt, 2009). In the beginning of 21st century, when the property is recognized as a cost-center that can contribute to profit (Shohet and Lavy, 2010), the novel strategies or approaches of FM were highly demand driven. In global context, FM is identified as a most mandatory function within the building industry so that it spreads widely transforming its traditional shapes into most demand function catering to contemporary business environment. The next section discusses the evolvement of FM in business context.

2.2. FM IN A BUSINESS CONTEXT

The ever-increasing competition for new construction works, declining investment in new construction projects, high investment and focus on maintenance and repair work, need of maintaining those existing buildings that are still in good conditions and many other factors have created to emerge and continually stay FM market around the world (Tan *et al.*, 2014). FM has established itself as a key service sector, with a diverse and highly-competitive market of FM contractors, in-house FM teams, FM vendors, FM

consultants and professional FM institutions (Tay and Ooi, 2001). Accordingly, FM has been transforming its role and functions to respond building industry vacuums at any given time. According to Alexander (2003), a market for facilities service is developing rapidly, with increasing emphasis on management roles. FM companies and consultants are developing new value added services with the growing need of clients. Sustainability and energy management solutions, customer satisfaction, maintain better environmental conditions, measuring key performance indicators, different types of contracts for risk sharing are few prospects of clients from the FM outsourced companies (Tan *et al.*, 2014; IFMA, 2011). In addition, International Facility Management Association (IFMA) (2011) reported that trends towards FM service providers have been recently changed primarily due to the global economic recession. The trends are to lower the FM contract price due lowest rental rates, use of performance based and gain sharing structure and change suppliers to make pricing concessions due to pressure on client cash flows and etc. Further it was revealed that client prefers to sign flexible and short term negotiated contracts allowing to re-position it with the future growth (IFM, 2011). However, FM has to incorporate sustainability, innovation and intelligence to provide a high standard of living and working environment for people in future context (Tan *et al.*, 2014).

With the demand driven growing trend, firms have moved to the FM market using different strategies or approaches. Tan *et al.*, (2012) proposed that the contractors could sustain business in long-term by entering to the FM market. The contractors shall reconsider the share of the maintenance in their business as there will be more opportunities in building maintenance, repair and renovation than new construction. Further, a single service supplier could expand their business towards bundled services and further to IFM service providers as shown in Figure 1 (Denali Group, 2013). The Figure 1 illustrates the growth of IFM suppliers and other industry profiles. The growth in the single service has moderated due to high outsourcing rates and pricing pressures while IFM demand is expected to remain strong as companies continue to consolidate their FM services (Little, 2016).

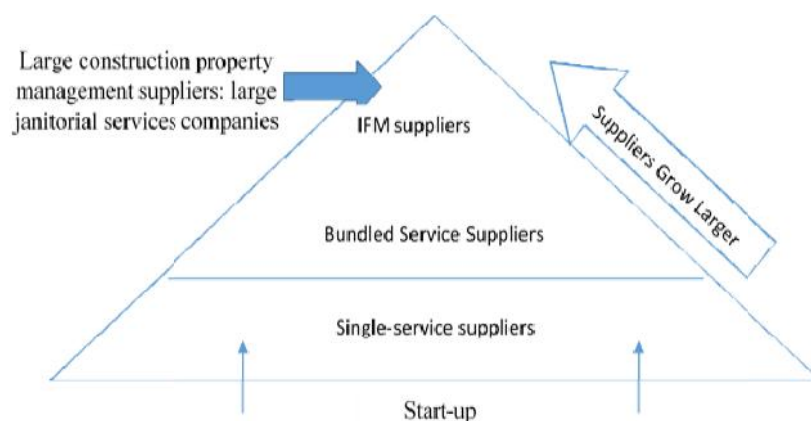


Figure 1: IFM Supplier Progression
Source: Denali Group (2013)

According to AMA Research (2016), the development of FM market has been positively influenced by the trend to outsource an increasing array of services, with a gradual shift towards ‘bundled service’ and Total FM contracts adding to contract values. PFI/PPP (Public Private Partnership) schemes have provided significant impetus for growth over the last decade with Design, Build Finance Operation (DBFO) schemes commonly incorporating long-term in UK. According to the Denali Group (2013), USAFM industry remains highly fragmented and competitive and highlighted the following factors of the competitive market.

- *Price and the quality of service: The low cost of entry in the facility services business intensifies the marketplace,*
- *Large number of service providers: A large number of regional and local owner-operated companies, located mostly in key cities in US.*
- *Low product differentiation: the scope of service offerings*

- *Competition from building owners*
- *Availability of a large pool of labour*
- *Moderate growth in prices of materials and purchases for facilities management services*
- *Service providers have been looking to expand their service offering to attract new customers and increase the opportunity of extending their present contracts*

The Denali Group (2013) further highlighted the key demand factors of FM services industry:

- *Economic Activity: Positive trends in macroeconomic indicators induce investment by both government and private sector, drive corporate profits, and widen service sector growth, directly driving facilities services demand.*
- *Occupancy: Improvement in office absorption and decrease in office vacancy rate indicates growing demand for offices, and thus affects facilities services demand.*
- *Employment: High unemployment rate impacts facilities management industry negatively as bankruptcies and shutdowns impact the demand for facilities management*

KPMG (2015) highlighted competitive characteristics of Real Estate and Facilities Management (REFM) outsourcing market as follows,

- *Many firms prefer to bundle their REFM services under the fewest number of service providers and operate under an integrated model to further reduce costs, drive consistency, and improve governance, controls, service level agreements, KPIs, and performance reporting.*
- *The key for buyers defining outsourcing goals is to ensure that their scope and level are practical and achievable given the nature of the outsourcing effort and in the context of buyers' own outsourcing skills and capabilities.*
- *Tactical REFM services (e.g., workplace and facilities services, lease administration, facilities management) are the activities most commonly outsourced.*
- *A growing number of service providers are demonstrating advanced capabilities to integrate into existing business operations to provide more high-value and strategic services in terms of services offered*
- *Organizations are increasingly seeking bids for services and considering alternative providers rather than simply renewing the contract with existing providers to ensure that buyers are getting the best price available for the services in scope and are best leveraging the current capabilities in the market.*
- *A most REFM outsourcing contracts are three to five years in length to provide buyers the flexibility to swap out providers*
- *A variety of factors affect service provider profitability including deal scope, transition costs and time frames, exchange rates, wage inflation, and buyer pricing sophistication*
- *The biggest factors impacting contract profitability are buyer pressure on pricing and aggressive competitiveness between providers, along with some buyer pull-back on more profitable discretionary services and an increased focus on cost cutting over process improvement work*

A growing competitiveness within the FM service sector raised a necessity among FM providers to differentiate the services they provide from their competitors, which can be achieved by giving attention to the specific needs of their clients (Cardellino and Finch, 2006). Tay (2006) discovered that both hardware, i.e. facilities and software, i.e. business philosophy of the organisation are important to enhance its competitive position with the FM. Tan *et al.* (2014) highlighted the fact that client's satisfaction, certification of company, reliability of service, quality of service, and company reputation as critical success factors of FM service organizations. Jensen (2010) noted that the combination of internal (corporate function under constant reformation in accordance with the development and the changing needs of the core business) and external market (outsourcing and the business strategies of a range of different types of provider companies) give strong dynamic forces for the field of FM practice.

Furthermore, AMA Research (2016) highlighted the fact that there has been a trend for large FM companies to make strategic acquisitions in order to increase their range of services and competitive position, the more difficult trading conditions have also influenced this trend to consolidation. This trend has accepted with the national or global coverage favouring larger multinational FM providers. The key to advancement will be maintaining high standard of services in core activities whilst adding value by offering enhancements and differentiated services. Although, these concepts are still novel to the Sri Lankan context, FM market is evolving steadily in Sri Lanka. The next section discusses how FM market has been evolving in Sri Lankan context.

2.3. FM MARKET IN SRI LANKA

Sri Lanka is proactively investing in various infrastructural projects, from improving transport networks to telecommunications and electricity generation. This has resulted the construction sector steadily increasing its stake in the Sri Lankan GDP from 7.6% in 2009 to 10.3% in 2013 (Raghunathan and Bera, 2014). According to Mayank and Robin (2009), there is a healthy demand for office and residential space in the Colombo real estate market with the growth in the textiles and apparel industry finance, insurance and information and communication technology hotels and restaurants sector. These sectors may look for a quality space environment. Raghunathan and Bera (2014) cited that, not only Colombo area, but also in out of Colombo areas have high demand for quality space environment with the growth of new real estate projects. With real estate costs being the second largest cost component after human resources for the services industry, awareness for it amongst office occupiers and developers regarding various cost-saving opportunities is important (Raghunathan and Bera, 2014). Thus, Sri Lankan property market seeks for specialised teams cater to the growing demand of FM.

According to Raghunathan and Bera (2014), the concept of outsourcing FM is at its nascent stage in Sri Lanka. Companies have historically adopted more of an in-house model with an ‘out-tasking’ approach in which single services such as cleaning, catering or maintenance, are delegated to external providers. The FM industry is still evolving in Sri Lanka, the shortage of qualified talent, benchmarking data and high-quality service providers and suppliers could create challenges in the quality and consistency of services. So far, also, there has been little attention paid on this. It is therefore assessing the competitiveness of the FM outsourced market in Sri Lanka together with its strengths, weakness, opportunities and threats is a timely requirement. In this context, Porter’s five force theory is suitable to assess FM outsourced market competitiveness. Accordingly, the next section briefly elaborates underlying principle behind, Porter’s Five Force theory and how it is used in this study.

2.4 PORTER’S FIVE FORCE THEORY

In 1980, Michael Porter introduced five basic competitive forces that defined the competition in an industry as shown in Figure 2. According to Porter (1980), the collective strength of these forces determines the ultimate profit potential in the industry, where profit potential is measured in terms of long run return on invested capital. Not all industries have the same potential. They differ fundamentally in their ultimate profit potential when the collective strength of the forces differs. In 2008, Porter has updated the five forces by mentioning that the five forces framework is to understand strategic implications for individual firms within an industry (Porter, 2008). Various authors have interpreted the theory favourably and adversely. However, this study applied the theory in order to assess the outsourced FM industry in Sri Lanka in terms of customers, suppliers, substitutes, potential entrants and competitive rivalry.



Figure 2: Forces Driving Industry Competition
Source: Porter (1980)

3. RESEARCH METHODOLOGY

The study was structured in several steps. A comprehensive literature review was carried out on a broader perspective with the purpose of getting familiarize with the research phenomena. This was mainly taken place to identify the outsourced FM industry and its growing trends in both local and global arena. Interview guidelines were developed based on the findings of the literature review. The interview guideline mainly consisted of two stages; namely; general information, existing FM industry. In order to examine the attractiveness of the outsourced FM market, the two expert interviews were carried out with experienced industry professional. The selection of experts was screened to the organisations which outsourced total FM services. It was found that few local and foreign companies exist in Sri Lanka. Corporate level persons from both local and foreign companies were selected for the study (refer Table 1). Semi structured interviews were carried out with them to assess the existing outsourced FM market in Sri Lanka. Finally, content analysis was used to streamline the findings of two respondents into five forces of Porter’s theory.

Table1: Respondent Profiles

Respondent	Year of Experience	Company Profile
Respondent 1 (R1)	23yrs	The respondent employed in a premier property development and investment holding organisation based in Sri Lanka. They are mainly delivering FM services to two of Colombo’s most iconic developments. In addition, they manage facilities ranging from commercial, retail to residential.
Respondent 2 (R2)	16yrs	The respondent employed in a global real estate services firm specialising in commercial property and investment management, providing comprehensive services for real estate management, which has recently established in Sri Lanka.

4. DATA ANALYSIS

The findings from two expert interviews were discussed under Five Forces introduced by Michel porter. Those will be the basis for following discussion. There are five headings, namely; Threat of new entrants, Threat of substitute, bargaining power of buyers, bargaining power of suppliers and finally competitive

rivalry. The aim of this study is to analyse the existing FM outsourced industry in Sri Lanka in terms of its competitiveness. Michel Porter introduced five forces that would determine the competitive position within the market. This section discusses the prevailing market of outsourced FM in Sri Lanka.

Threat of New Entrants

Various strategies have been used to enter the Sri Lankan FM market by local and international companies. R1 employs in an organisation which is managing and operating one of the largest high rise buildings in Sri Lanka for more than 15 years. Having seen the opportunity in the industry and their potentials to survive in the industry, the company expanded its' operations as a FM services provider. The very first FM business of the company was a residential property which was invested by the company itself. According to one of the respondents (R1), the reputation that was built over the years, competent human resources and physical resources have supported to enter the industry easily. R1 further mentioned that *“entering to this industry was very easy as we have proven our capacity over past years by maintaining the largest building which enables to maintain the trust for the client”*. R2 employed in a foreign company which is new to the Sri Lankan FM industry, mentioned that *“being a multinational company with competent resources make easy to enter the market”*. This company has used a Greenfield investment strategy where the company was originated by itself while bearing risks associated and cost to enter the market. R2 mentioned that *“we didn't face any challenges or issues to catch the Sri Lankan market since there is no government restrictions, or rigid legal framework or political interventions”*. This view was accepted by the R1 as well. However, both respondents explained that companies have to possess huge financial resources to enter the market. R2 is uncertain about the economic stability of the country. Thus, R2 is doubt about the exchange rate risk, inflation rates and other price fluctuations from a point of view of an international company. However, both organisations are currently satisfied with the return, company growth and success in the FM market. Moreover, both respondents accepted that the industry is not matured and it is in growth stage whereas it is easy for new companies to enter the market. There are huge opportunities in the market for both international and local companies.

Threat of Substitute

It is obvious that the property owners have three options to obtain FM services; either in-house or outsource or partial in house or outsource. According to respondents, most of the buildings are allocated in house staff to carry out FM services. The respondents believed that this will be changed in near future where there will be a huge growing demand for outsourcing FM services among all building sectors. R2 stated that *“who likes to bear the burden or take responsible of the burden, thus, most are looking for a company to delegate their FM services for a reasonable price”*. This was very similar to the idea of R1 where R1 was of the opinion that *“considering my past few years of experience, more buildings are interested to outsource FM services to a specialised team. This is profitable than employing in-house staff”*. Hence, it can be safely concluded that there is a less threat from the substitute service of in house.

Bargaining Power of Buyers

The outsourced FM market is relatively small in Sri Lanka. Buyers of this industry are property owners or clients who wish to procure FM services. In Sri Lanka, there is a large pool of clients in different property categories such as hotels, retail, hospital, residential and other and these clients have different expectations. According to the R1, property owners in residential buildings or condominiums are mostly outsourcing their operations comparing to other property owners. This is also proved by the fact that most of the clients of R1 and R2 are from residential sector. R2 serves for the clients of office buildings, manufacturing, corporate and other commercial properties. R2 further mentioned that *“we got lot of business by word of mouth, and when some reputed organisations accept outsourcing prior to in house, there is high tendency to follow the same trend by other companies well”*. Accordingly, both respondents are expecting growing future demand from the different client categories due to transformation of clients' perceptions or trends as well as the new constructions. Hence, it is apparent that there are huge customers for this industry though less number of FM outsourced companies exists in the industry.

The discussion revealed that the FM services are provided through the contracts of minimum one year period. The parties can negotiate the contract terms according to their preference. Trust and performance of the service provider may directly stimulate to break or renew the contract period. Client can switch to different contractors after a prior notice. Further, client and service provider mutually decided the contract

price. Determining the price is critical for both parties. Respondents highlighted that client has a higher bargaining power in deciding the contract prices.

According to respondents, Sri Lankan clients are not well aware of the concept of FM. R2 mentioned that *“clients request different levels of services and they have different expectations as they do not have any idea on what is FM”*. Thus, FM service providers generally explain their services, capacities and service outcomes to their clients about the benefits in addition to their business. The study revealed that both companies of R1 and R2 are very selective on deciding the clients. R2 said *“I don not want troublesome clients. Thus we focus mostly on genuine customers where we can negotiate”*. This demonstrates the fact that the service provider is more powerful within an environment of uneducated clients about FM. However, when it comes to a selective approach, client has high bargaining power for obtaining FM services than the service provider.

Bargaining Power of Suppliers

Current practice of the industry is FM companies subcontracting some of the services to suppliers upon winning the main contract. In this industry, suppliers are single service providers such as security, cleaning, pest control, building maintenance, office equipment service and other facilities related services. The study discovered that there are number of suppliers or sub contracted parties in the industry and most of them are local companies. However, respondents are not satisfied with the quality of the service and performance level of suppliers. This was confirmed by R1 stating that *“I doubt whether these suppliers are resourceful and they have sufficient technologies or knowledge to perform their task. In further, we are having scarcity of quality suppliers”*. Due to the lack of experts and availability of large pool of suppliers, the bargain power of the suppliers is less in the industry. Therefore, it would be a new challenge for them to compete in the industry and there is a need of developing their capacities in terms of quality, time, technology, performance etc.

Competitive Rivalry

The defined Sri Lankan market for outsource FM services is yet to be discovered. More FM companies have initiated their business recently and need to expand limits of the FM market. Local companies who were providing a single FM service, have extended their portfolios by providing total FM solutions. The in-house FM units which have long being operated and managed high rise buildings having identified its full potentials and capabilities, have converted their business centres to delivering total FM solutions. Property developers or real estate companies and construction companies have diversified their business risks and expanded the market by entering to total FM services industry. Moreover, international FM companies have initiated business in Sri Lanka with growing demand for FM services. Number of local and foreign outsourced companies exist in the industry and many more companies are expecting to establish. It was discovered that two companies which were selected for this study are dominating the market due to its financial and reputational capacities. However, the competitors are having different strategies. The reputation, quality of the service, financial resource, human resources and brand loyalty enable FM companies to compete in the industry. However, it was found that there is a cold war among these companies.

5. DISCUSSION

The choice of in-house or outsource FM services is a critical decisions taken by the property owners. It is obvious that there are advantages and disadvantages of both the approaches though various facts contribute for the decision. However, in Sri Lanka, there is a slight growing trend towards outsourcing FM services and therefore there is an emergent market for the outsourced FM organisations to cater to the growing demand. Number of organisations are approaching the market and delivering their services according to their own strategies. Hence, the study intended to investigate the prevailing competitiveness in the industry through the Porter's five forces analysis. Figure 3 presents the features of the existing FM outsourced industry in terms of five forces which were discussed in the aforementioned section. It was revealed that it is easy to enter the market as there are less political, governmental and legal aspects though companies required to possess a strong financial and human resource base. Further, there are different types of clients in different property sectors and their bargaining power is average due to the

large pool of untapped customer requirements. The industry is price sensitive. There is no differentiation strategy other than the in-house approach. Though there are many suppliers exist in the industry, their power is less. Even though there is a slight competition prevails among the existing FM companies, the market is attractive for innovative and expert FM service providers.

Business organisations cannot always succeed in their business operations of this industry. According to respondents, several foreign and local companies have failed in this industry. It is therefore companies' decisions to identify its target market and potentials. R2 mentioned that "*this industry in Sri Lanka is Virgin, and there is lot more to grow in this industry*". However, it is evidenced that there are great opportunities in this industry and the respondents are expecting more demand for the FM businesses in the future.

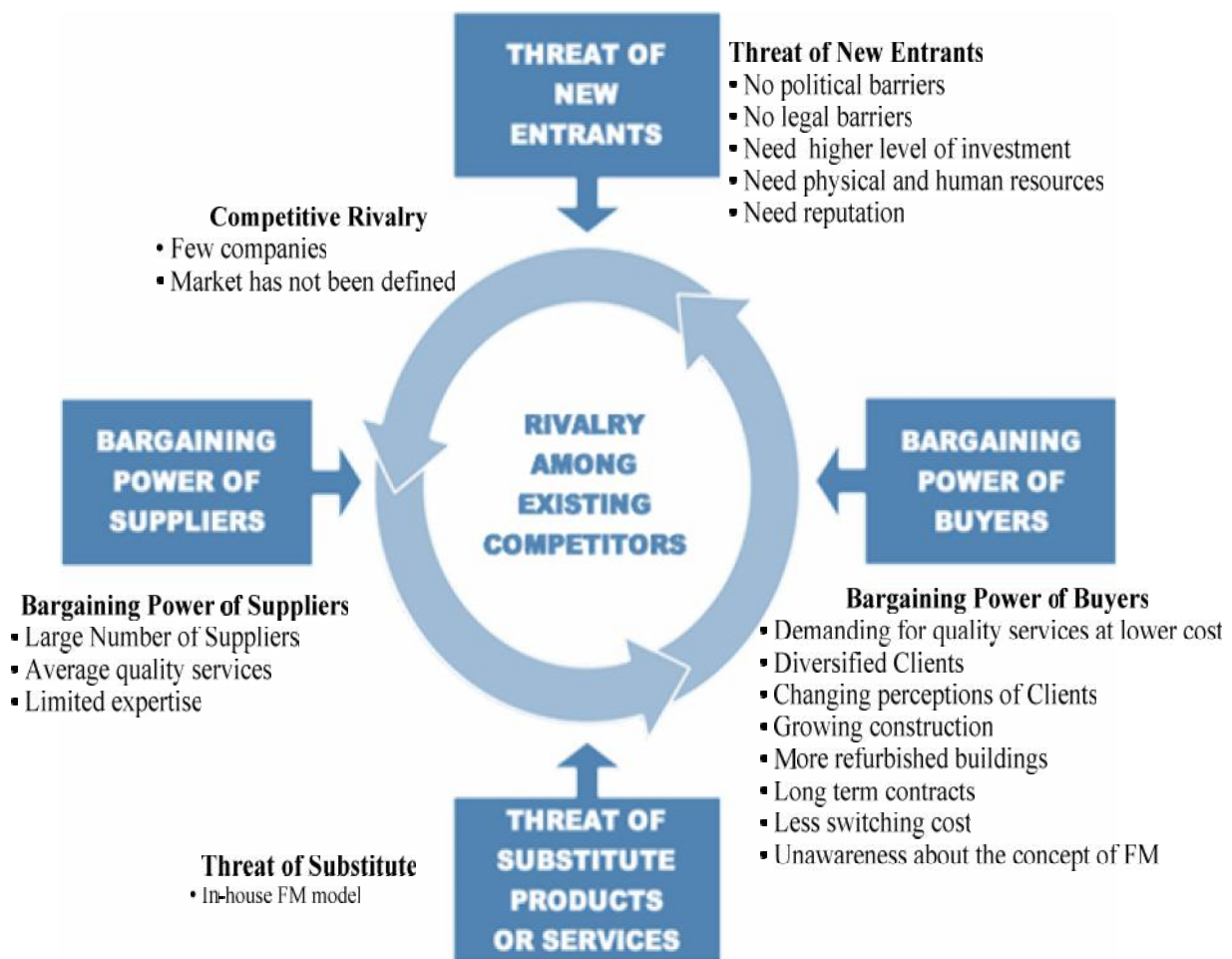


Figure 3: Outsourced FM Market in Sri Lanka: Porter's Five Forces

6. CONCLUSIONS AND RECOMMENDATIONS

FM market in Sri Lanka is long been considered a niche market that has not been widely considered by industry professionals or researchers. The growth of the FM industry in Sri Lanka is very slow and the market is still in its infancy. The definition of FM is poorly understood and it is not being practiced in an appropriate way. It was apparent that foreign companies and local companies are operating as a FM service providing companies and this has become most interesting topic in the field of built environment. Specially, there is a growing trend for outsourced market within the Colombo region due to the massive ongoing construction projects, urban development projects, and new investments on infrastructure development projects. Considering the opportunities and the vacuum of the market, more and more foreign and local companies are aiming for the industry. Thus, this study intended to assess the

competitiveness of the existing outsourced FM market in Sri Lanka. The Porter's five forces analysis is enabled to identify the industry competitiveness and attractiveness. According to the findings, the market is attractive for investors. However, investors require financial resources and competent enough human resources to sustain or gain profitability within the market. Changing perceptions of property owners for the decision of outsourcing FM services is creating large number of clients and more opportunities for the FM service providers. There is cold war in the industry among few FM service providers for the existing market which is defined by their own. In fact, the industry is attractive and welcoming resources in order to expand the boundaries of the market. However, the FM business organisations should build up their own loyalty, trust and resources to gain competitive advantage in order to make profits in the industry.

7. FURTHER RESEARCH

This study is a preliminary investigation of analysing the outsourced FM services market in Sri Lanka. The researchers are expecting to expand the study in order to identify market entry strategies, product diversification strategies and critical success factories for business performance for FM service industry in Sri Lanka.

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