

越南綜合設施管理

Integrated Facilities Management in Vietnam

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Overview of Vietnam's
current Integrated
Facilities Management
(IFM) Services Market

淺談當今越南綜合
設施管理(IFM)服務
市場

THE MARKET FOR IFM SERVICES

in Vietnam is at a very early stage of development. Facility management (FM) is generally regarded as routine cleaning and maintenance services of buildings that are performed by hiring cheap local cleaning contractors. In terms of customer awareness and market participation, Vietnam lags behind its South East Asian counterparts such as Malaysia, Singapore, and Indonesia.

越南綜合設施管理服務市場猶如一片待開墾的處女地。設施管理 (FM) 一般被理解為是大廈的常規清潔及維護服務，通常聘用本地要價較低的清潔公司完成。在客戶意識及市場參與度方面，越南大大落後於馬來西亞，新加坡，印尼等東南亞國家。



participants vary from large domestic and international companies to small cleaning and maid agencies. Homegrown Pan Pacific Corp. is the largest cleaning service provider in Vietnam. International FM companies such as ADEN Services and P.Dussman Vietnam Co. Ltd have limited market share in cleaning services but are more dominant players in other FM services such as catering and remote site management.

越南的設施管理服務市場以單一服務供應商為主，而單一服務供應商又以清潔公司為主。市場高度分散，水平參差不齊，既有國內外的大型企業，又有小型清潔女傭中介。土生土長的 Pan Pacific Corp. 是越南最大的清潔服務供應商，而 ADEN Services, P. Dussman Vietnam Co. Ltd 等國際設施管理公司對清潔服務市場投入有限，主攻配餐，遠郊管理等其他設施管理服務。

Though the top-tier global real estate service providers such as CBRE, Jones Lang LaSalle and Colliers International are present in Vietnam, most of these companies are yet to start offering IFM services in the country.

雖然 CBRE, Jones Lang LaSalle, Colliers International 等全球一流房地產服務供應商均在越南設有辦事處，但大多還未推出綜合設施管理服務。

Good potential for growth in IFM services in Vietnam

越南綜合設施管理服務市場前景廣闊

The fledgling IFM services market in Vietnam has strong potential for growth due to a variety of independent as well as interrelated factors. Though the global financial crisis has taken its toll on the building construction industry, the amount of floor space being added, especially in the commercial office sector, continues to increase significantly from the ongoing projects. Ho Chi Minh City is set to see

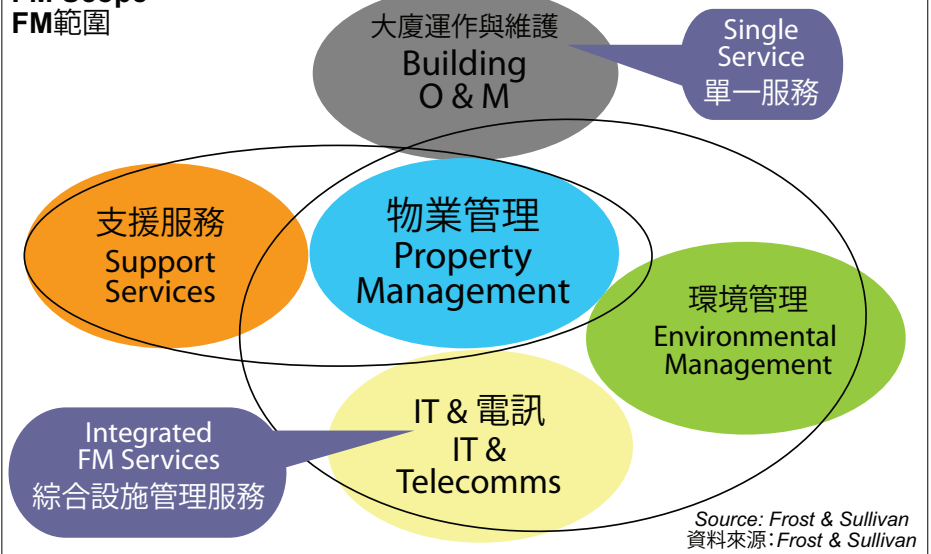


The market for outsourced FM services can be split into 2 typical types of service: single services and integrated services. Single service providers offer services within one service sphere only whereas integrated service providers offer services in multiple service spheres and in some cases, manage all the functions related to the facilities.

設施管理服務外判市場可分為兩大類：單一服務與綜合服務。單一服務供應商僅提供單個服務範疇的服務，而綜合服務供應商則提供多個服務範疇的服務，甚至一手包攬與設施相關的所有管理職能。

Single service providers, that are mainly cleaning companies, dominate the FM services market in Vietnam. The market is highly fragmented and industry

FM Scope FM範圍



Cost is the single most important criteria for outsourcing FM operations to third party service providers in most cases

a three-fold increase in Grade A office space in the period 2009-2011. Close to 200,000 sq. m. of Grade A and B office space was added in Hanoi in 2009. New office buildings are expected to be more technologically advanced and are required to adhere to stringent environmental norms. Professionalism in facility management is expected to increase and the trend to outsourcing to IFM services providers can grow in the process.

羽翼未豐的越南綜合設施管理服務市場前景廣闊，其原因看似各不相干，但又彼此關連。雖然全球經濟危機為房屋建造業敲響了警鐘，但新竣工樓面面積卻持續快速增長，尤其是商用寫字樓領域。預計2009-2011年胡志明市的甲級寫字樓地方將增長三倍，2009年河內甲級和乙級寫字樓地方將增加近200,000平方米。新寫字樓將採用更先進的技術，需奉行嚴格的環境規範。設施管理的專業化程度有望提升，綜合設施管理服務對外判亦將越來越依賴。

Following the trend in other Asian countries, the demand for IFM services is expected to come mainly from large multinationals setting up offices in Vietnam. With an increasing presence of multinationals, especially in the financial services, IT and telecom sector, there is a potential

growth opportunity for IFM service providers.

與亞洲其他國家的發展趨勢一樣，越南綜合設施管理服務需求將主要來自在國內設置辦事處的大型跨國公司。隨著越來越多跨國公司來到越南，越來越多金融服務，IT和電訊公司的湧入，展現在綜合設施管理服務供應商眼前的是一個頗具成長潛力的市場。

The rise in pollution is a burning issue in Vietnam that has led the government to temporarily stop the development of industrial parks in certain provinces. All industrial facilities need to have adequate water and waste treatment facilities. IFM service providers with consultative skills in energy and waste management can expect a potential growth opportunity.

越南的污染問題迫在眉睫，政府暫停了若干省份的工業園建設。只要有工業設施的地方，就需要有充足的供水和廢物處理設施，因此能夠提供能源和廢物管理諮詢服務的綜合設施管理服務供應商前景可期。

Apart from the above three factors, the increasing trend to outsource non-core operations by the businesses is expected to increase the demand for third party



IFM services. However, the trend in Vietnam has so far been to outsource to local cleaning service providers. It remains to be seen how IFM service providers can differentiate themselves from routine cleaning service providers and increase their footprint in the market.

除上述三大因素之外，非核心業務的外判趨勢亦將刺激對第三方綜合設施管理服務的需求。然而越南目前還只停留在聘用



國內清潔服務供應商的階段。綜合設施管理服務供應商如何將自己與常規清潔服務供應商區別開來，如何立足市場，這是一個值得關切的問題。

Market restraints that dampen the prospect of growth

制約因素令發展前景蒙陰

While there seems to be a good prospect for growth for IFM services in Vietnam, a number of factors can pose a strong restraining effect. The awareness about the benefits of outsourcing FM services to third party service providers is very low and is likely to remain so in the near future. The preference to manage facilities in-house continues to be high, especially among local companies. Cleaning and security services are generally outsourced to cheap local players. Hence, the trend to engage professional IFM service providers is low.





越南的綜合設施管理服務市場前景固然明朗，但亦受制於多種因素。企業對於將設施管理服務外判給第三方服務供應商的益處認識不夠，且短期內可能很難轉變觀點。設施管理自行處理之風盛行，本土企業尤其如此。清潔與安保服務常常交由國內低端供應商打理，聘請專業綜合設施管理服務供應商的意識淡薄。

The strong connections with local companies and the benefit of local market knowledge continue to help homegrown players dominate the FM services market. International IFM companies face challenges to penetrate the market, given they do not enjoy the cost benefits and connections with local government and businesses.

憑藉與國內企業千絲萬縷的聯繫以及對本地市場的深入了解，本土供應商依舊在設施管理服務市場佔據主導。國際綜合設施管理公司一無成本優勢，二缺政商人脈，在開拓市場方面難免碰壁。

Cost is the single most important criteria for outsourcing FM operations to third party service providers in most cases. This short-term vision by the companies almost always leads them to handpick cheap local players for facility maintenance. Local players hire cheap semi-skilled and unskilled labour and hence enjoy



cost advantages over international IFM service providers. Government facilities are managed in-house or by local FM companies (mostly cleaners) that maintain strong relationships and connections with the government. Budget allocation for FM services is low, limiting the opportunities for IFM players.

在多數情況下，成本是企業判斷是否將設施管理業務外判給第三方服務供應商的最重要標準。從短期利益考慮，企業大多會選擇便宜的本地設施維護服務供應商。本地供應商聘用非熟練工人和半熟練工人，因此成本比國際綜合設施管理服務供應商要低得多。政府設施的管理一般由內部消化，或者派給與政府交往甚密的本地設施管理公司（多為清潔公司）。設施管理服務預算低，也是限制綜合設施管理服務市場發展的原因之一。

There are other issues that might dissuade the IFM service providers from operating in Vietnam. Mechanical and

Electrical (M & E) services, which can be a significant revenue earner for FM companies, are generally managed by in-house engineers and not outsourced. Customers, especially during current difficult economic environments, have turned price-sensitive and margins for FM companies have typically gone down and vary currently between 5% and 10%.

還有一些問題亦會迫使綜合設施管理服務供應商放棄越南市場。機電服務 (M & E) 可謂是設施管理公司的一個重要收入來源，而在越南這一般是由內部工程師負責，鮮有外判。眼下正值經濟不景氣之時，客戶對價格變得尤為敏感，設施管理公司的利潤空間普遍收窄，目前介乎 5%-10% 之間。

The challenges explained above can have a relatively strong adverse impact on the potential growth of the IFM services market and hinder Vietnam from being a strong market for IFM services, unlike countries such as Singapore and Malaysia.

上述挑戰將圍制綜合設施管理服務市場的發展潛力，阻礙越南成為像新加坡、馬來西亞等國家一樣的綜合設施管理服務大市場。

Prospective growth opportunities 潛在發展機遇

Construction in real estate, rising concern about pollution, and an increase in focus on energy conservation are expected to influence the growth of IFM services in Vietnam. While the trend to outsource all types of FM services will grow in the future, the demand for integrated services is not expected to rise dramatically, at least



The current market for integrated services is less than 1% of the potential FM services market

in the next 3–4 years. The banking, IT, and telecom sectors are expected to offer the maximum growth opportunity for IFM players. Growth of IFM services is driven by these sectors in emerging economies such as Indonesia. The industrial sector, especially the oil and gas and power industries, are also expected to drive the growth of the IFM market as businesses start outsourcing their non-core activities, a trend observed in other Asian countries.

房地產業如火如荼，污染問題日益突出，節能意識深入人心，這些都將影響越南綜合設施管理服務市場的發展前景。設施管理服務全面外判是必然發展趨勢，但至少未來 3–4 年內，綜合服務的需求難見可觀增長。銀行、IT 及電訊行業將成為綜合設施管理服務供應商的主要客源，印尼等新興市場的綜合設施管理服務市場正是受到這些行業的推動。工業領域，尤其是油氣及電力行業亦有可能為綜合設施管理市場的發展注入動力，因為在其他亞洲國家的這些企業中已經出現了將非核心業務外判出去的勢頭。

The current market for integrated services is less than 1% of the potential FM services market. While this might be encouraging news to the IFM service providers, the process of gaining foothold in the Vietnam market will be difficult and fraught with various challenges. IFM players need to differentiate themselves from local specialized FM players by creating awareness of the value-added services they can provide



compared to regular cleaning or security service providers. They should highlight their expertise in energy and waste management, best practices benchmarking, and IT-enabled services.

在當下的設施管理服務市場，綜合服務不足 1%。一方面來看，這對綜合設施管理服務供應商當屬利好，但另一方面來看，

越南的市場開發之路必將充滿艱辛與挑戰。綜合設施管理供應商需創造增值服務概念，表明其能提供常規清潔或安保服務供應商所無法提供服務，藉此將自己與國內專業設施管理供應商區別開來。突出自己在能源與廢物管理，最佳實踐標桿和服務科技化方面的專長才是綜合設施管理供應商的制勝法寶。|AT|

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