

## **Moldova Facility Management Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)**

Market Report | 2023-01-23 | 95 pages | Mordor Intelligence

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### **Report description:**

The Moldova Facility Management Market is anticipated to record a CAGR of 2.8% over the forecast period (2023 - 2028). The growing emphasis on outsourcing non-core operations and growth in property management is expected to drive the Moldova market for facility management services. Along with this, the government regulation on safety measures and environmental concerns to follow green practices is expected to drive the market.

### **Key Highlights**

Moldova has prominence in outsourced markets for facility management services in terms of development and sophistication. The region's facility management industry operates with integrated contracts from significant vendors across various cities, such as Glemus, Planet Group International, etc. Small local players focus on single contracts and single-service solutions. However, given the dynamics occurring across the region, there are increasing opportunities to leverage facility management and corporate real estate in new ways.

Over the last decade, several service vendors, such as Smartlinks, S.R.L, etc., operating in the region have been focused on expanding their presence to leverage the increasing demand for facility management, especially with the recent trend favoring outsourcing of non-core operations. Further, Moldova has been witnessing increased opportunities to leverage facility management and corporate real estate in innovative ways, given the dynamics across the country.

In terms of the end-user demand, the contribution of growing tourism in previous years increased the facility management market in Moldova hospitality management, primarily driven by the government's constrained budgets that led to the continuous outsourcing of essential facility management services.

The market for Moldova facility management has been subjected to moderate growth due to the rise in demand for people with improved requirements. This scenario is projected to bolster the development of the market during the forecast period. The ongoing pandemic has resulted in the steady market growth in the region. However, the pandemic has resulted in limited

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production, leading to a sharp decline in business inputs.

The outbreak of COVID-19 has had a mixed business impact on facilities management firms. The restrictions on the movement of people resulted in a decline in project work and a decreased level of activity across many customer sites. Significant players in the market, such as Smartlinks S.R.L, and other global company branches in Moldova, were adversely affected due to the pandemic lockdown.

## Moldova Facility Management Market Trends

### Commercial Buildings Segment to Hold Significant Share in the Market

The Facility Management in Moldova is still growing; very few companies, such as Glemus and Smartlinks S.R.L, are the only country-specific FM-providing companies. The country's lack of large-scale industrialization and poverty are the major restraints to the emergence of FM companies.

Most cities, such as Chisinau, Codru, etc., opted for property management as a facility management segment with rental of luxury houses and apartments as their services. Glemus company has its spread in property management wholly while Smartlinks S.R.L provides complete facility management services.

The growing investments and spending on construction works improve the chances of implementing facilities management services, and there has been a growing trend in the value of construction work replicates the adoption of facility management. As per the National Bureau of Statistics of the Republic of Moldova, in 2021, construction works were segmented as residential buildings with RON 3973.3 Million, non-residential buildings with RON 3796.1 Million, while engineering structures which are mostly commercial buildings, valued at RON 6579.8 Million.

### Energy Management Service Requirement Drives the Facility Management Market

The energy performance in residential and non-residential buildings is low in the Republic of Moldova. The public sector in Moldova (which includes central government and municipal buildings, as well as facilities and street lighting) is a large energy user. While there is no centralized database of public buildings or energy use, some data exists at the Energy Efficiency Agency. A substantial amount of the existing building stock was constructed during the Soviet era and has not been properly maintained. Most have low thermal performance, and thermal losses account for about 50 percent of the heat consumption in the country. Moldova also has the 3rd National Energy Efficiency Action Plan (NEEAP), which includes EE measures in the public buildings sector.

Many of the public buildings in Moldova (particularly kindergartens and schools) are underheated and need maintenance and repair. Another challenge is the rate of use of the area of public buildings. Many public buildings have broken roofs, windows and floors, and poor insulation. Thus, these buildings have a high technical potential for energy savings. For such buildings, the investment costs and typical payback periods of EE investments may be under-estimated in the energy audits.

The Regional Programme for energy efficiency in public buildings has estimated a cost of EUR 200-300/square meter for "deep renovation" and energy efficiency projects in Moldova. Underheating and structural rehabilitation are common in the region, and some measures to address this can be included in typical EE investments.

However, to recover the full investment cost from EE savings, such investments in structural rehabilitation or upgrading comfort levels need to be limited so that the investment costs can be recovered through energy cost savings in no more than 12 years.

## Moldova Facility Management Market Competitor Analysis

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The Moldova Facility Management Market is highly consolidated with limited firms of different sizes. This market is anticipated to encounter several partnerships, mergers, and acquisitions as organizations continue to invest strategically in offsetting the present slowdowns they are experiencing. The clients in this region are employing FM services to increase the ease of their business operations. The market comprises key solutions and service providers, such as Glemus, Planet Group International, Smartlinks S.R.L, etc.

April 2022 - Eastern Partnership Economic and Investment Plan, aiming to mobilize around EUR 3.4 billion in public and private investments for five flagships: SME support, trade facilitation, energy efficiency, connectivity, and human capital development.  
January 2022 - UNECE held national training seminars on high-performance energy efficiency standards in buildings in the Republic of Moldova. This helped strengthen the capacity of national authorities, building sector professionals (including energy managers and energy auditors), and other stakeholders to implement more advanced energy efficiency standards in buildings and introduce energy-efficient technologies at the national level.

Additional Benefits:

The market estimate (ME) sheet in Excel format  
3 months of analyst support

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