

Industry Report

IFM Suppliers and Integrated Service Models in Lab Space

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Integrated Facilities Management (IFM) service providers assist the user of the built environment by bundling the essential management functions and associated support services to support the overall business of the user. The IFM suppliers are trying to claim lab services space which is anticipated to increase as the IFM industry matures. IFM suppliers are offering an integrated service model which includes:

- OEMs
- Contract Service Providers
- Mobile Self Performance Teams
- On Site Self Performance Teams

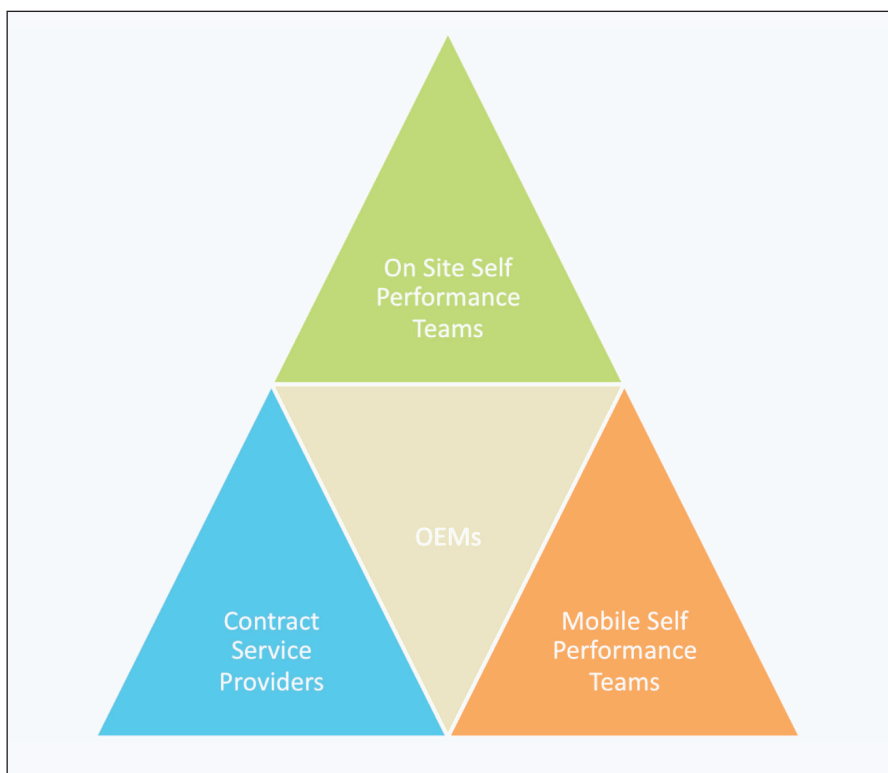


Figure 1. Integrated Service Model in Lab Space

The IFM suppliers, acting as the prime provider of laboratory services, seeks to optimise the use of on-site staff for the delivery of services as it provides the most time effective support while enabling cross functional utilisation of resources to optimise cost effectiveness and drive savings for customers.

IFM suppliers provide one-point contact solutions for various lab services. The service capability varies with different IFM suppliers. Generally it includes:

Lab Consumables:

Lab Consumables industry refers to the consumables required in the lab (chemicals – salts, sugars, alcohol, acids, bases etc., non-chemicals – gloves, lab coats, filters, resins.)

Lab Services: Includes the following 3 categories.

1. Research Enabling Services: Takes account of glass wash, pipette calibration, instrument calibration, mammalian and microbial culture media preparation.
2. Laboratory Logistics: Includes inventory management, mail services, shipping and receiving – (non-GMP, GMP, warehouse, hazmat, import/export), dry ice delivery, safety programs, surplus asset management and office supplies.
3. Research Support: This area of specialties include: asset management, preventive and corrective maintenance of the equipment, administrative, operational and validation support

Advantages of Moving to IFM Suppliers over Traditional Suppliers

- Consolidation of services from single point of contact instead of managing multiple service vendors and maintenance schedules.
- Unbiased perspective on the product offerings from various suppliers.
- Efficient management structure achieved through enhanced communication channels and high quality of lab services.
- Bulk procurement of offerings and optimisation leading to optimum cost savings.
- Standard measures and processes spanning all lab accounts.
- Engaging with IFM suppliers result in lower service costs since IFMs have lower internal costs (i.e. no product development, no warehousing, etc.)
- Combining IFM and Lab Services cause additional synergies which are bound to result in additional cost savings (i.e. shared call centre, multi-tasking personnel, etc.)
- Being independent of the instruments or consumables sales process, IFM suppliers add value to the business and avoid a conflict of interest allowing the buyer to make purchasing decisions on the basis of scientific need and leaving IFM suppliers to support the lifecycle management of the instrument from sourcing to disposal.

| Supplier | Lab Consumables | | | | Lab Services | | | | | |
|------------------------|-----------------|-------------------------------|-----------------|-------------------------------------|---------------------|---------------|-------------------------------|-------------------------------------|------------------|------------------|
| | Lab Chemicals | Personal Protective Equipment | Filters, Resins | Proteins, Antibodies, Enzymes, Kits | Pipette Calibration | Glass Washing | Chemical Inventory Management | Mail Services, Shipping & Receiving | Dry Ice Delivery | Asset Management |
| IFM Suppliers* | ü | ü | ○ | ○ | ü | ü | ü | ü | ü | ü |
| Traditional Suppliers* | ü | ü | ü | ü | ü | ü | ü | ○ | ○ | ü |

Figure 2. Comparison of Services: IFM vs Traditional Suppliers. * Service capability of the supplier varies with different suppliers. IFM suppliers provide one-point contact solutions

Supplier Base

There is a rise in supply of Integrated Service Model providers, who offer blended or individual laboratory services delivery models such as in-house service, service consolidations, independent service providers and OEM models. Few suppliers in this space are Labwell (a JLL subsidiary), Johnson Controls, Oce Business Services, PBM Plus Inc., Pitney Bowes, Sodexo and ARAMARK.

Johnson Controls provides Lab Support and Lab Instrumentation services for the entire scope of Instruments typically found in R&D, Quality and Campaign labs. This ranges from scales, mixers and pipettes to NMRs, HPLCs, and Mass Spectrometers. It specifically delivers repair, maintenance, calibration and qualification of scientific equipment in self perform and sub-contracted way. Labwell (subsidiary of JLL) mainly offers maintenance and support of low end services/equipment such as calibration, maintenance, and repairs on all types of facility/laboratory instrumentation equipment including: lab equipment (balances, incubators, ultra-low temp freezers, refrigerators, and liquid nitrogen freezers), temperature probes, pH probes and critical environments. Sodexo has a team of experts focused in delivering laboratory instrument support. Teams of on-site engineers are responsible for laboratory equipment providing a 'first fix' service for much of the equipment in use, and arranging and managing planned maintenance and breakdown contracts with manufacturers of complex systems.

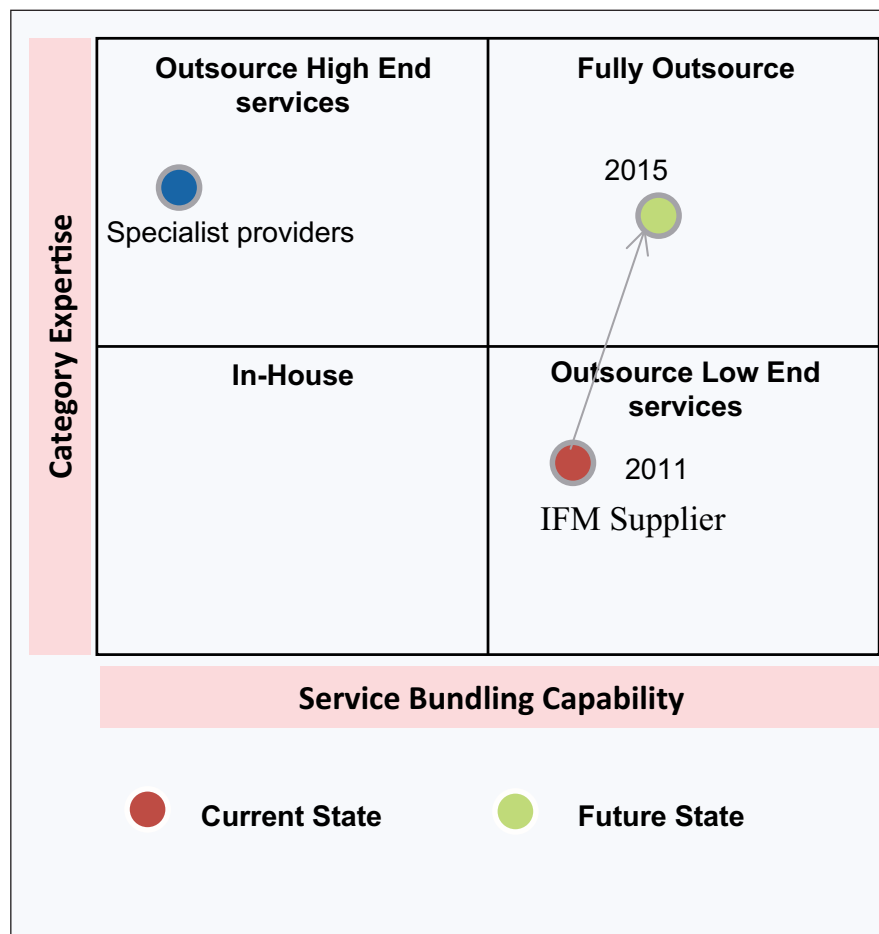
Industrial Adoption

Fortune 100 pharmaceutical companies are already moving towards adoption of using integrated lab delivery services model offered by IFM suppliers. Johnson Control has provided services to one of the vaccine giant in industry for R&D plant facilities management. Johnson Controls delivers integrated Lab Instrument and Lab Support services to six of the top ten Life Sciences companies globally. Sodexo is providing services for lab instrument maintenance and optimisation. With its diversified service profiles Labwell is also engaged with various big pharmaceutical companies across the globe.

Depending on the diversified service requirements the adoption of integrated service model in lab space through IFM suppliers had offered a direct cost savings of 25-40%. The several indirect benefits include improved uptime from days to hours, increased visibility of service delivery reporting and consistent delivery of services and ability to make independent and informed decisions on asset acquisition, without the hassle of follow-up issues associated with maintenance, servicing, repair and life cycle management.

Lab-Space Management Strategy

On the basis of our analysis we recommend adoption of a dual outsourcing model for buyers (pharmaceutical companies). We suggest the buyers to work with both the FM provider as well as the specialist provider for managing their lab requirements including lab equipment and scientific services space.



Conclusion

The lab services market is expected to become more competitive due to participation of the IFM service providers like JLL and Johnson Controls. IFM service providers bring in their own technicians and better project management into the lab services. Currently, there are not many capable IFM suppliers who can provide lab services. It would be beneficial to engage with facilities management suppliers, which are also acting as lab service providers, because they are unbiased and also offer an integrated service approach. This will enable the buyer to consolidate the volume and have a better control over their spend.

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Representative Sample Division for Correct Analysis



A faultless and comparable analysis is closely linked to accurate sample handling. Only a sample representative of the initial material can provide meaningful analysis results. This can be achieved by using a rotating sample divider, such as **Retsch's** new PT 100. It divides the sample so exactly that the composition of each of the 6, 8 or 10 fractions corresponds exactly to that of the original bulk sample. This applies both for fine-powdered and coarse materials up to 10mm feed size. The material feed and dividing processes take place automatically and without loss of material.

The new rotary tube divider PT 200 allows for the representative, dust-free division and reduction of larger volumes of bulk goods. The ratio of the

fractions is freely adjustable. Both dividers feature digital time setting and comfortable quick-release clamps.

Advantages include: high division accuracy to suit modern analytical devices; modular design; automatic material feed via synchronised feeder; quick-release clamping system for simple and rapid handling of sample bottles; digital time setting.

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