









# Disruption waves

R

Music Photography	2000+		
Photography		2010+	
Video rental	Print Television Hospitality 		2020
		Retail Healthcare Automotive Telco FMCG Finance	2020 There's no safe haven anymore



- St. Gallen klooster plan
- 819-826 AD
- 112 cm x 77,5 cm
- 50 gebouwen
- 330 beschrijvingen
- Schaal 1:160
- Lichtinval









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Filippo Brunelleschi 1377

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"It's cheaper to buy a \$35,000 robotic arm than it is to hire an employee who's inefficient making \$15 an hour... bagging French fries"

Ed Rensi, Fmr. McDonald's USA CEO







# "The challenge for building materials companies is that the person with the most power to choose a product, has the least knowledge."

David Leslie, RWC, Director of Technical Services & Product Management at Polyguard Products



#### Decision making power

Mark Mitchell - Whizard Strategy



Product knowledge

#### **Primary motivation**



#### **Decision making power**

Mark Mitchell - Whizard Strategy



Product knowledge

#### **Primary motivation**

## unique characteristics - complex client context

- Multiple stakeholders with diverse interests/needs
- Project business and on-site construction
- High industry **fragmentation**
- Low profitability and capitalization
- Highly **cyclical** and **volatile** business
- Unstable workforce

- Immature project definition and technical assessment
- Over-preference for **lowest price** bid
- Conservative clients
- Increased risk transfer to contractors
- **Complexity** of contracts and dispute resolution



### unique characteristics - complex client context

Multiple stakeholders

• Immature

on-site

**lowest price** 

#### fragmentation

- Low profitability
  - cyclical volatile

- Conservative
- Increased risk
- Complexity

Unstable



Source: World Economic Forum; The Boston Consulting Group

# **Construction in our society** 6% global GDP **5-10%** worldwide employment 25-40% global carbon emissions **LARGEST** consumer of raw materials Vs. +200K daily in urban areas, needed affordable & healthy housing



Source: World Economic Forum; The Boston Consulting Group





	2.1 Technology, materials and tools		2.2 Processes and operations			
_	Advanced building and finishing materials	Standardized, modularized and prefabricated components	(Semi-)automated construction equipment	Front-loaded and cost-conscious design and project planning	Innovative contrac- ting models with balanced risk- sharing	A common and appropriate frame- work for project management
Company level	New construction technologies, e.g. 3D printing	Smart and life-cycle- optimizing equipment	Digital technologies and big data along the value chain	Enhanced manage- ment of subcontrac- tors and suppliers	Lean and safe con- struction manage- ment and operations	Rigorous project monitoring (scope, time, cost)
3	2.3 Strategy and	d business mode	2.4 People, org	anization and cult	ure 👘	
	Differentiated busi- ness model and tar- geted consolidation and partnerships	Sustainable products with optimal life-cycle value	Internationalization strategy to increase scale	Strategic workforce planning, smart hiring, enhanced retention	Continuous training and knowledge management	High-performance organization, culture and incenti schemes
evel	3.1 Industry col	laboration	<u>(</u> )	3.2 Joint industry marketing		
Sector level	Mutual consent on standards across the industry	More data ex- change, bench- marking and best- practice sharing	Cross-industry collaboration along the value chain	Industry-wide collaboration on employer marketing	Coordinated communication with civil society	Effective interaction with the public sector
Government	4.1 Regulation and policies			4.2 Public procurement		
rnn	Harmonized building codes/standards	Market openness to international	Promotion and funding of R&D,	Actively managed and staged project	Strict implemen- tation of trans- parency and anti-	Innovation-friendly and whole-life-cycl

**Rockwool** kfon<sup>®</sup>

Source: World Economic Forum; The Boston Consulting Group

# Walk the talk



Röckfon

# Walk the talk





# Walk the talk





# Walk the **BIM** talk

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# Walk the **BIM** talk





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#### Links to extra info



http://www.jorislaarman.com/work/mx3d-bridge/

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## Vragen?

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