

#PINP18



COMMUNICATE COMMIT DELIVER

2018

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WHAT THE FUTURE HOLDS FOR PARTNERS

A look into the New Horizons Foundation's Futures Study



NEW HORIZONS

A Chance to Grow FOUNDATION

An HVAC and Sheet Metal Industry Initiative™



vision
future

Providing Vision and
Leadership for the Future
of the HVAC and
Sheet Metal Industry

**THE HVAC AND
SHEET METAL INDUSTRY
FUTURES STUDY
UPDATE 2016**

 **NEW HORIZONS**
A Chance to Grow FOUNDATION An HVAC and Sheet Metal Industry Initiative™

NHF FUTURES STUDY: MAJOR TAKE-AWAYS

Four Trends/Thoughts



NATIONAL
DEMAND FOR
HVAC SERVICES



ENERGY
COSTS



PREFAB,
MODULARIZATION
AND BIM



SOLUTIONS
FIRST

NATIONAL DEMAND FOR HVAC SERVICES

01

Growth in most areas and markets

02

Merger and acquisitions will increase

03

Internet of Things (IoT) and technology advances

NATIONAL DEMAND FOR HVAC SERVICES

04

The middle market
challenge

05

Union construction
business model

06

Workforce development

ENERGY COSTS



Net Zero movement

New systems and approaches

Engineers and manufactures

What's the impact?

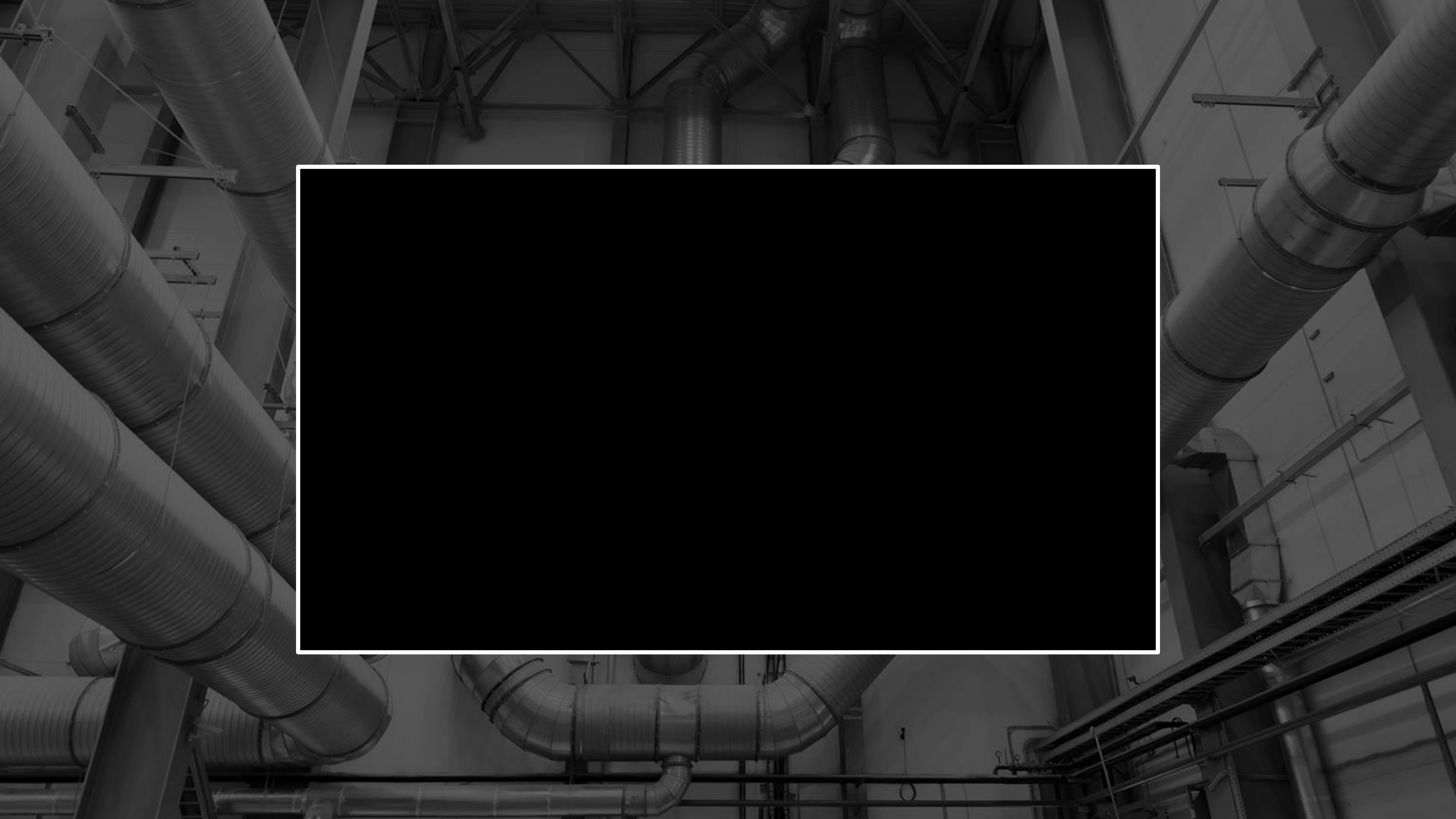
Energy use, not energy costs

Federal government

Private/real estate development

Building ratings

**ENERGY
COSTS**





PREFAB, MODULARIZATION & BIM

- Workforce shortages drive demand
- Schedule, quality and safety
- Multi-trade fab continues to grow



PREFAB, MODULARIZATION & BIM

- Are SMACNA contractors investing in the future?
- Jurisdiction in multi-trade fab
- Are we able to embrace being a factory?
- Do we separate into fabricators and installers?



BIM

Great BIM is an expectation, not an option

We have competitors

Design becomes BIM

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What is it?

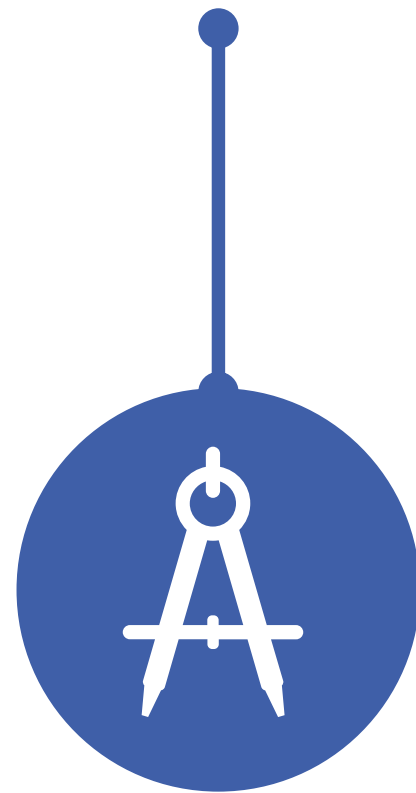
Who uses it?

Trend

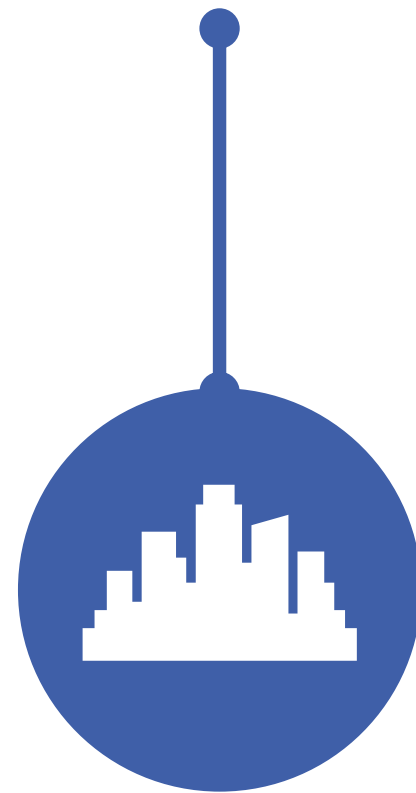
Does this favor union contractors?

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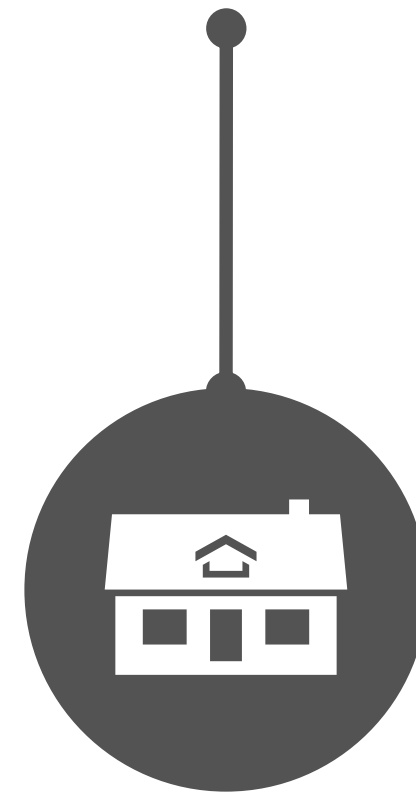
Engineering



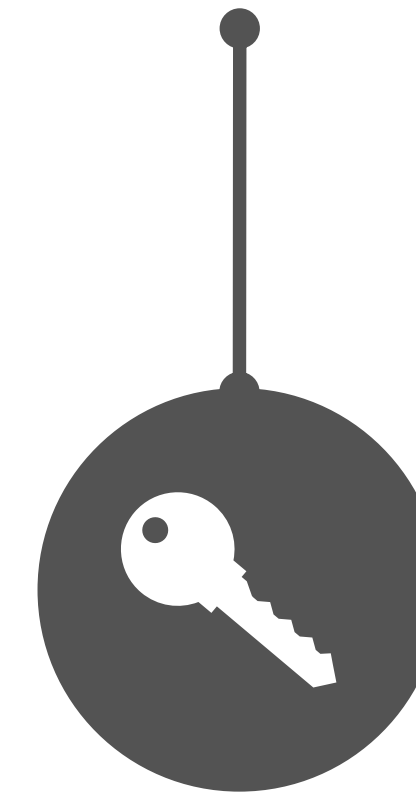
Building information modeling (BIM)



Off-site/ pre-fabrication



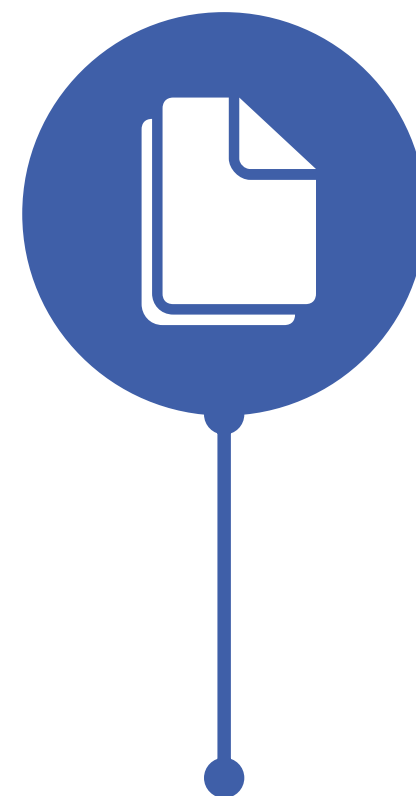
Commissioning



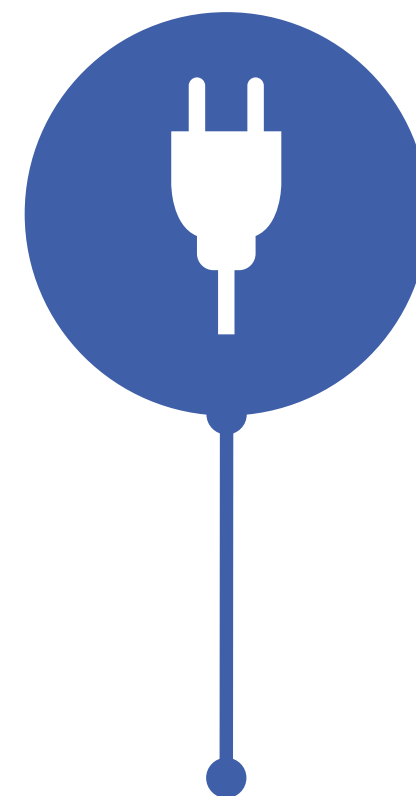
24/7 Service



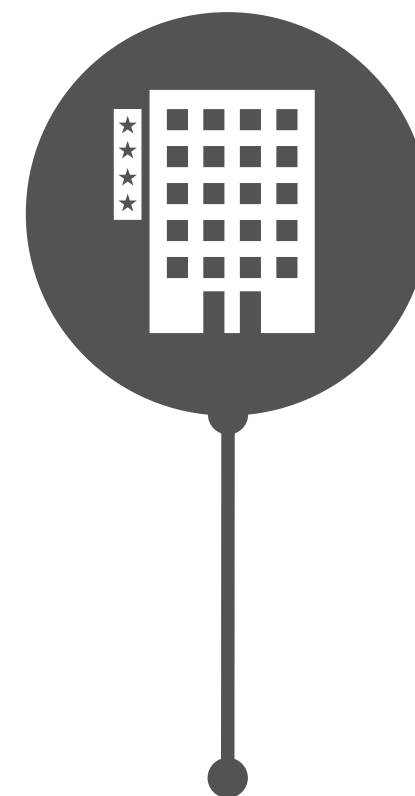
Conceptual estimating



Energy modeling



Construction



Operations & maintenance

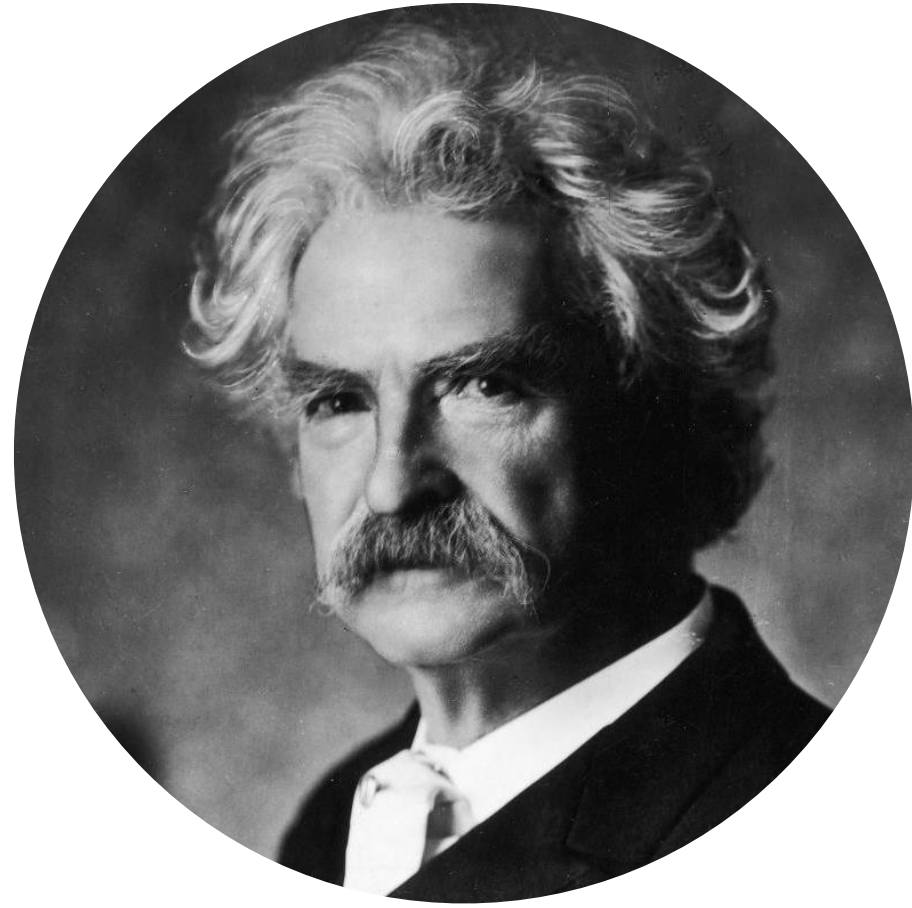


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Are contractors willing to expand their scope of services?

Are we ready to play?

Don't be a Swiss watch when everyone is wearing Apple watches!



The secret of getting ahead is getting started.

MARK TWAIN



It always seems impossible until it's done.

NELSON MANDELA



There are risks and costs to action. But they are far less than the long range risks of...inaction.

JOHN F. KENNEDY

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