

Australian Maintenance Masterplan

Australia's first maintenance contract opportunity roadmap.

> MAY 2018 • ISSUE 2.2



**Save hundreds of hours ... Choose your markets. Select your opportunities.
Know when contracts start and finish. Includes Quarterly Updates.**

An unprecedented boom in Australian resources investment over the past decade has created significant new capital stock – and these assets will need to be maintained over the long term. Now is the opportunity to tap into this growing market. Understanding when existing maintenance contracts will expire and next be tendered enables contractors to select, plan, and strengthen relationships for these opportunities.

The **Australian Maintenance Masterplan (AMM)** is BIS Oxford Economics' latest tool designed to help companies fast track tactics to identify, target and win maintenance contracts across 12 sectors including: metal ore mining, metals processing, coal mining, oil and gas, rail, ports, electricity, defence, telecommunications, wastewater, manufacturing (processing) and general infrastructure sectors.

This easy-to-use planning tool, in Excel format, helps maintenance contractors identify specific opportunities and model the monthly revenue they will yield over the next 5 years.

The opportunity pipeline now includes 3045 (\$19.5b) of opportunities, with parameters for:

- > Market sector and segment
- > State and geographic hub
- > Asset owner and operator
- > Opportunity
- > Nature of service
- > Scale of operations
- > Incumbent contractor(s)
- > Contract type, start and expiry dates
- > Opportunity annual estimates
- > Links to contract announcements

AMM provides competitive intelligence:

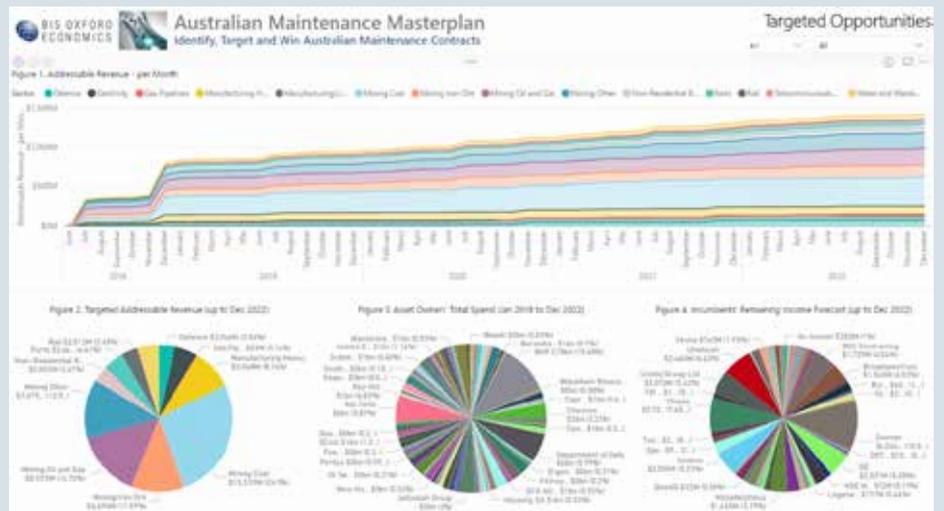
- > BY CLIENT – what contracts are available, their value and other parameters
- > BY CONTRACTOR – see which contracts they are working on, split by sector, their value, when they expire, and other parameters

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Australian Maintenance Masterplan Outputs

The highly visual database lends itself to be used in company 5 Year Plans and internal business planning presentations.

- > **OPPORTUNITY PIPELINE listing contract durations through to 2022 (Excel).** Users of AMM select the individual opportunities that they want to pursue and assign a “go” (probability of the contract coming out) and a “get” (chance that they will win it). Graphics and revenue forecasts for targeted opportunities.



> MAPPING FUNCTIONS

Filter, view tabular data, and zoom in on assets using satellite imagery.



> COMPETITOR mapper.

Re-cut data by client or competitor. Provides aggregate value and individual contracts listed.



Australian Maintenance Masterplan

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The integrated **Microsoft Power BI Desktop** offers powerful automatic charting, with state-of-the-art interactive visualisations, industry leading data query and modelling and filtering on key parameters. The mapping function plots filtered or targeted assets on an interactive map.

- ▶ **MAPPING FUNCTIONALITY** – significant redesign of the Power BI includes interactive tabulated data, ability to zoom in on asset using satellite imagery
- ▶ **INCUMBENT** worksheet – see what each contractor will earn on each of their fixed term contracts by year, and potential earnings after they expire.
- ▶ **ANALYSIS** worksheet – view the value of asset owner contracts, year by year, and then for each contractor
- ▶ **CONTRACT EXPIRIES** worksheet – see the number of fixed term contracts coming to their end by year, contract listing notes if extension options apply
- ▶ **NEW 'TREETMAP' SECTOR VISUAL** showing relative scale by sector and client
- ▶ **AMM Key Benefits:**
 - ▶ Easy-to-use excel format with powerful and interactive Microsoft Power BI desktop graphics
 - ▶ Annual subscription includes rolling quarterly updates, from start date: end Feb, May, Aug, Nov
 - ▶ Access to analysts to provide feedback via amm@bisoxfordeconomics.com.au
 - ▶ Data is based upon mix of actual known maintenance contracts and best estimates. Reviewed / improved quarterly
 - ▶ Optional deep dives or additional tailored analysis conducted on your behalf – price on application
- ▶ **AMM issue 2.2 (May 2018) has significant improvements**
 - ▶ Total of \$19.5b p.a. of opportunities
 - ▶ 42 new maintenance, FM and contract mining opportunities totaling over \$1.1b per annum
 - ▶ Updates and reviews across all sectors, improved categorization of opportunities, improved instructions
 - ▶ A new “Rev F” BI file with improved functionality enabling improved search functionality including deep dives by state and their associated revenue curves
- ▶ **Future enhancements through 2018 include:**
 - ▶ Continued focus on improving Mining sector including addition of more processing facilities
 - ▶ Continued focus on Facilities Management across multiple sectors
 - ▶ Expansion of existing sectors

RELATED STUDIES

Mining in Australia 2018 provides comprehensive market information and forecasts for mineral commodity markets and for activities undertaken at each stage of the mine life cycle; from infrastructure set-up, to mining operations and asset maintenance. Includes historical data and forecasts for global demand, supply and commodity prices, exploration, construction and investment, mining production and contract mining, and mining maintenance by commodity. Updated quarterly.

Maintenance in Australia 2018 is the only comprehensive report available for Australia's maintenance industry. Using our own primary market research, the service provides estimates of current maintenance activity broken down by contractor vs in-house, type of work, type of contract, and by state across all types of infrastructure, utilities, mining, light and heavy industrial facilities, defence and non-residential buildings. 5 year annual forecasts of total maintenance activity as well as contestable work by sector are provided, followed by longer range forecasts ... all supported with extensive commentary on maintenance developments by sector.

ABOUT BIS OXFORD ECONOMICS

As Australia's leading provider of research and forecasting solutions for the infrastructure and mining sectors, we assist our clients by providing the best available data, industry analysis and thoroughly researched forecasting services.

We can support clients with bespoke services including:

- Cost escalation consultancy
- Demand Forecasting Models
- State and Regional Analysis
- Cost Benefit Analysis
- Expert reports for prospectus, IPO or tender documents
- Private Briefings on Industry Outlook

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Standard price \$10,200+GST

Special rate for:

Maintenance in Aust 2018ed subscribers \$5,100+GST

Mining in Australia 2018ed subscribers \$8,160+GST

For further enquiries please contact:

Adrian Hart • T: (02) 8458 4233 • E: ahart@bisoxfordeconomics.com.au or
Kellie Osta • T: (02) 8458 4287 • E: kosta@bisoxfordeconomics.com.au at our Sydney office.

BIS OXFORD ECONOMICS

Level 8, 99 Walker Street, North Sydney NSW 2060, Australia

T: +61 2 8458 4200 • F: +61 2 9959 5795

www.bisoxfordeconomics.com.au