

Methodology

We apply a range of approaches, drawing on BIS Shrapnel's diverse capabilities, in order to construct a quality sectoral database, reliable industry information and forecasts.

Data Gathering

There are numerous published and unpublished sources of information, which we gather together and incorporate into our report. This data gives an incomplete picture of the maintenance market in Australia, which we complete by undertaking original industry market research.

Industry Market Research

We conduct an extensive survey of purchasers of maintenance services (the owners, lessees or managers of the assets) across each industry sector. We interview organisations such as state road authorities, rail infrastructure owners, port authorities, water boards, government departments, private sector companies and individual facilities such as large hospitals and mine sites.

We gather numerical information, as well as qualitative responses across a range of issues.

Market Forecasting

The methodology for forecasting the value of maintenance activity by sector includes:

- Projections of the capital stock in each sector, based on BIS Shrapnel's extensive forecasting reports, which cover all types of investment and construction activity
- Forward expenditure and outsourcing plans
- Examining government policies with regard to future outsourcing and contestability in maintenance markets
- Our analysis of the cyclicity of maintenance expenditures in each sector, and assessing the implications arising from our forecasts of the Australian economy.



Maintenance in Australia 2012 – 2027



INFRASTRUCTURE AND MINING

BIS Shrapnel is a fully Australian owned company. The company has developed specialist knowledge in the following areas:

- economics
- building and construction
- residential property
- commercial property
- infrastructure, mining & engineering
- maintenance
- forestry
- household appliances and power tools
- foodservice
- paper and packaging

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ENQUIRIES

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The Australian maintenance market is worth over \$30 billion per annum, covering maintenance of civil infrastructure, mines, buildings, defence and manufacturing facilities. The maintenance market presents strong growth opportunities for contractors given the magnitude of investment in new capital stock, the need to catch up on a growing maintenance backlog, and the continued evolution of outsourcing arrangements.

Maintenance in Australia 2012 – 2027

This detailed report, now in its 6th edition, is the only source of detailed estimates and forecasts for Australia's \$30+ billion maintenance market.

Based on original market research and analysis, the report covers 12 broad industry sectors across infrastructure, buildings, manufacturing, mining and defence. Each industry sector has its own drivers and outlook for maintenance activity, and how and under what terms it will be undertaken. *Maintenance in Australia 2012 – 2027* navigates through all of these industry segments and drivers to provide clear estimates of activity, coupled with forecasts and thoughtfully considered analysis and commentary.

The report is an essential planning and strategy tool for all organisations with an interest in the Australian maintenance market.

Report Contents

■ Detailed industry database

The report is a unique source of comprehensive data on maintenance activity in Australia. *Maintenance in Australia* covers 12 broad industry sectors, with the value of maintenance work done broken down by:

- Contractor versus inhouse maintenance
- Type of maintenance contract
- Type of maintenance activity

■ Forecasts

We provide forecasts of total maintenance activity as well as the value of work done by contractors for each industry sector. Forecasts are provided annually for the next five years (to 2016/17), followed by two five year averages which push the forecasting horizon to 2026/27. All forecasts are supported by a thorough written rationale.

■ Detailed industry database

The nature of maintenance contracting arrangements is highly varied across industry sectors, and is evolving quite quickly. For each sector we discuss current trends and future developments on key maintenance issues.

■ Online access

As well as a hardcopy report, all subscribers receive online access to the report from the BIS Shrapnel website. This provides ready access to all chapters of the report in PDF format, all tables in Excel format and all charts in PowerPoint format for internal use and distribution.

Industry Coverage

We provide consistent information for each of the following industry sectors:

■ Infrastructure

- Roads
- Railways
- Ports & harbours
- Water & sewerage
- Electricity supply:
 - Generation
 - Transmission
 - Distribution and retail
- Gas pipelines
- Telecommunications

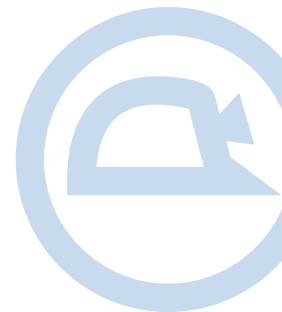
■ Mining and Heavy Industry

- Mining:
 - Coal
 - Oil & gas extraction
 - Metal ore mining
 - Other mining

- Heavy manufacturing facilities:
 - Petroleum, coal and chemicals products
 - Metal products
 - Non-metallic mineral products

■ Building Sectors

- Light manufacturing facilities:
 - Food, beverages & tobacco
 - Textiles, clothing & footwear
 - Wood & paper products
 - Printing, publishing & recorded media
 - Machinery & equipment
- Defence
- Education
- Hospitals
- Offices
- Shops
- Hotels



Maintenance in Australia 2012 – 2027

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