

AGILITY

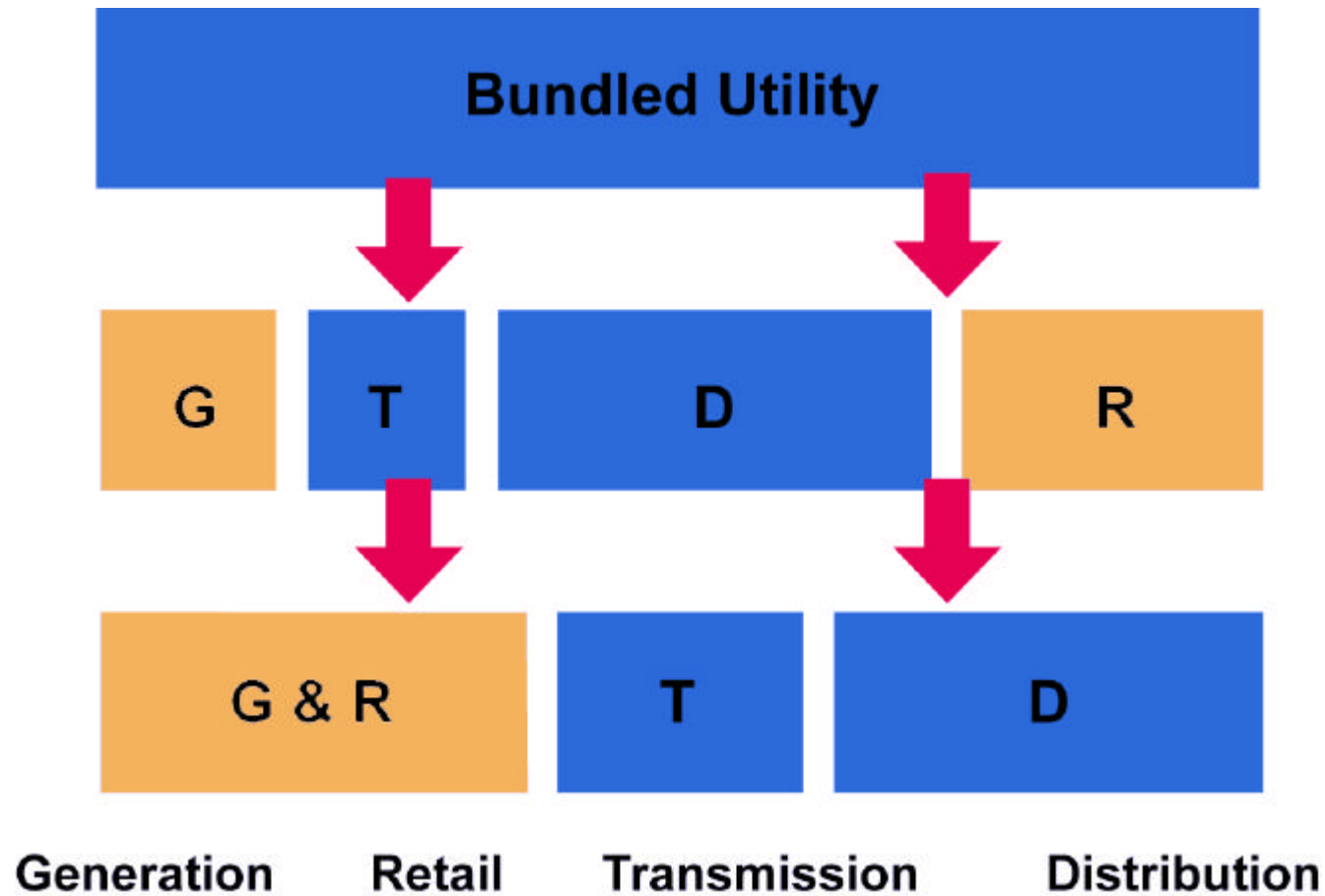
*Agility*

**Mark Harper**  
General Manager - Agility

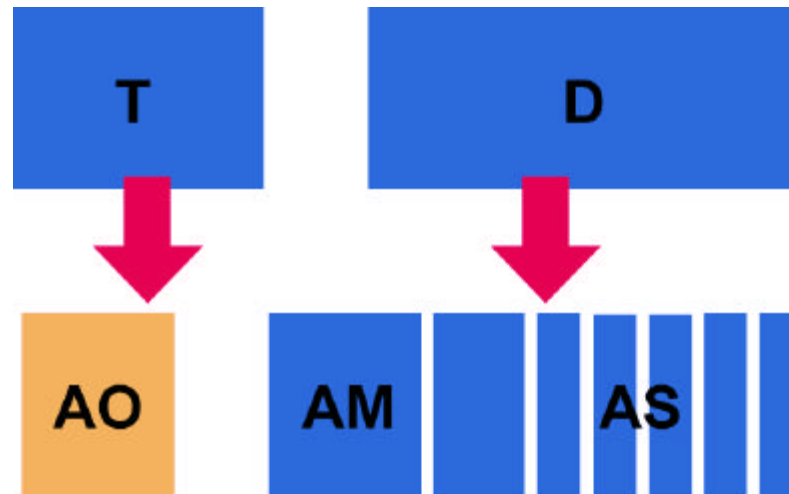
***Winning infrastructure management***

# VERTICAL SEPARATION

*Agility*



# UNBUNDLING OWNERSHIP



**Asset Owner**

**Asset Manager**

**Asset Services**

RESULTING ENTITY

*Agility*

AM AS

OTHER ENERGY UTILITIES

*Agility*



Energy

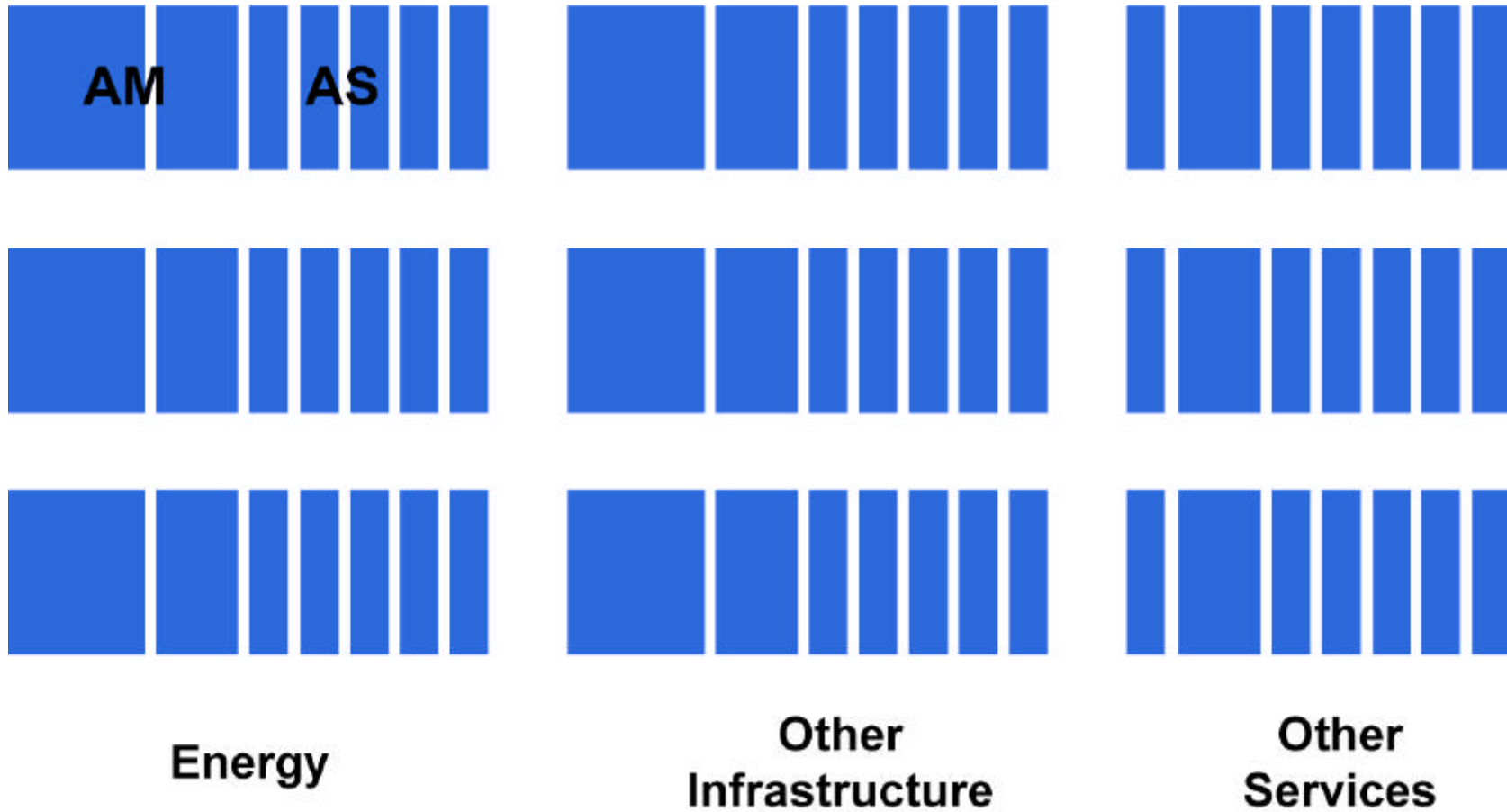
OTHER INFRASTRUCTURE INDUST.



Energy

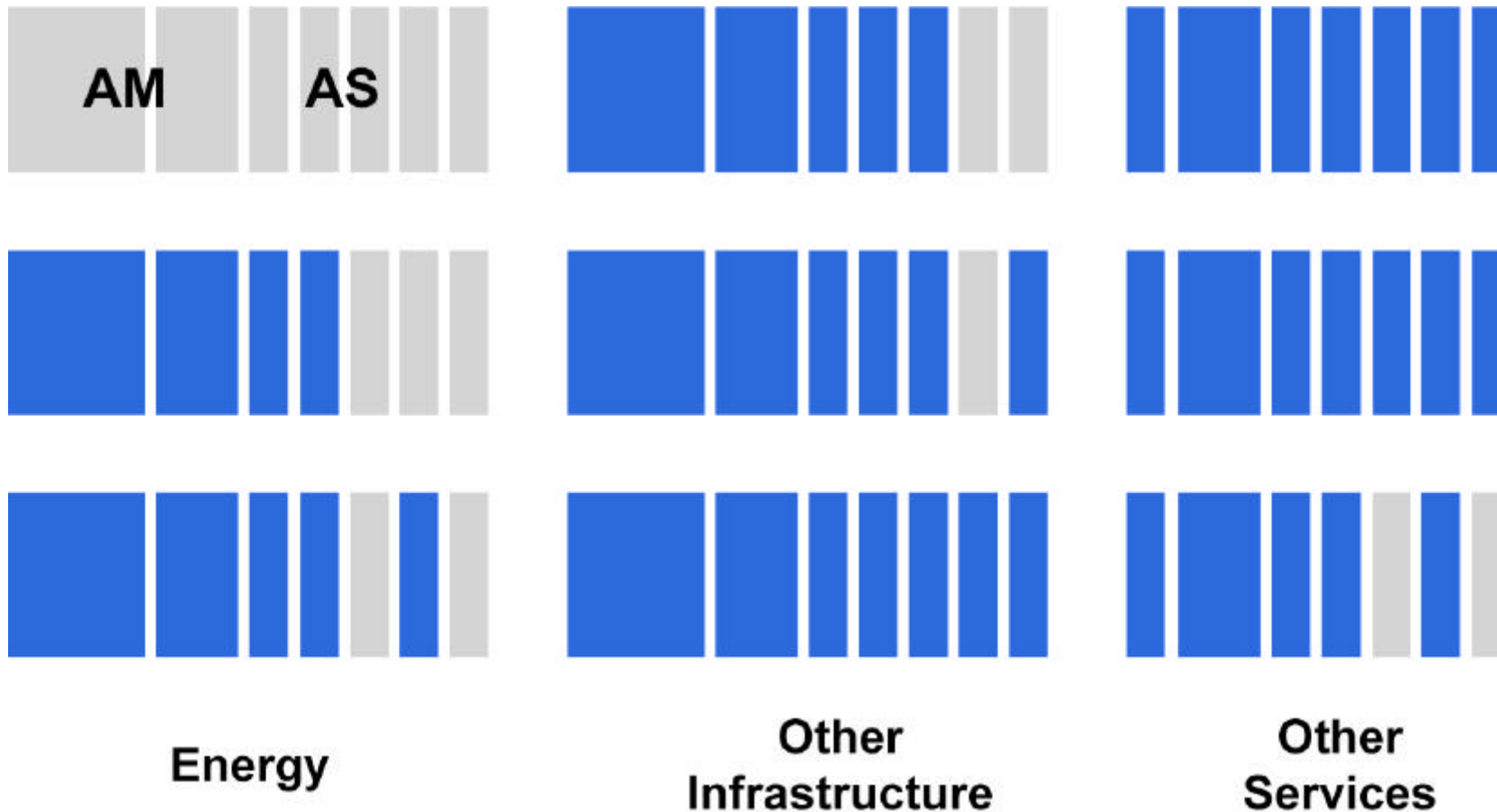
Other Infrastructure

# IN OTHER SERVICE INDUSTRIES

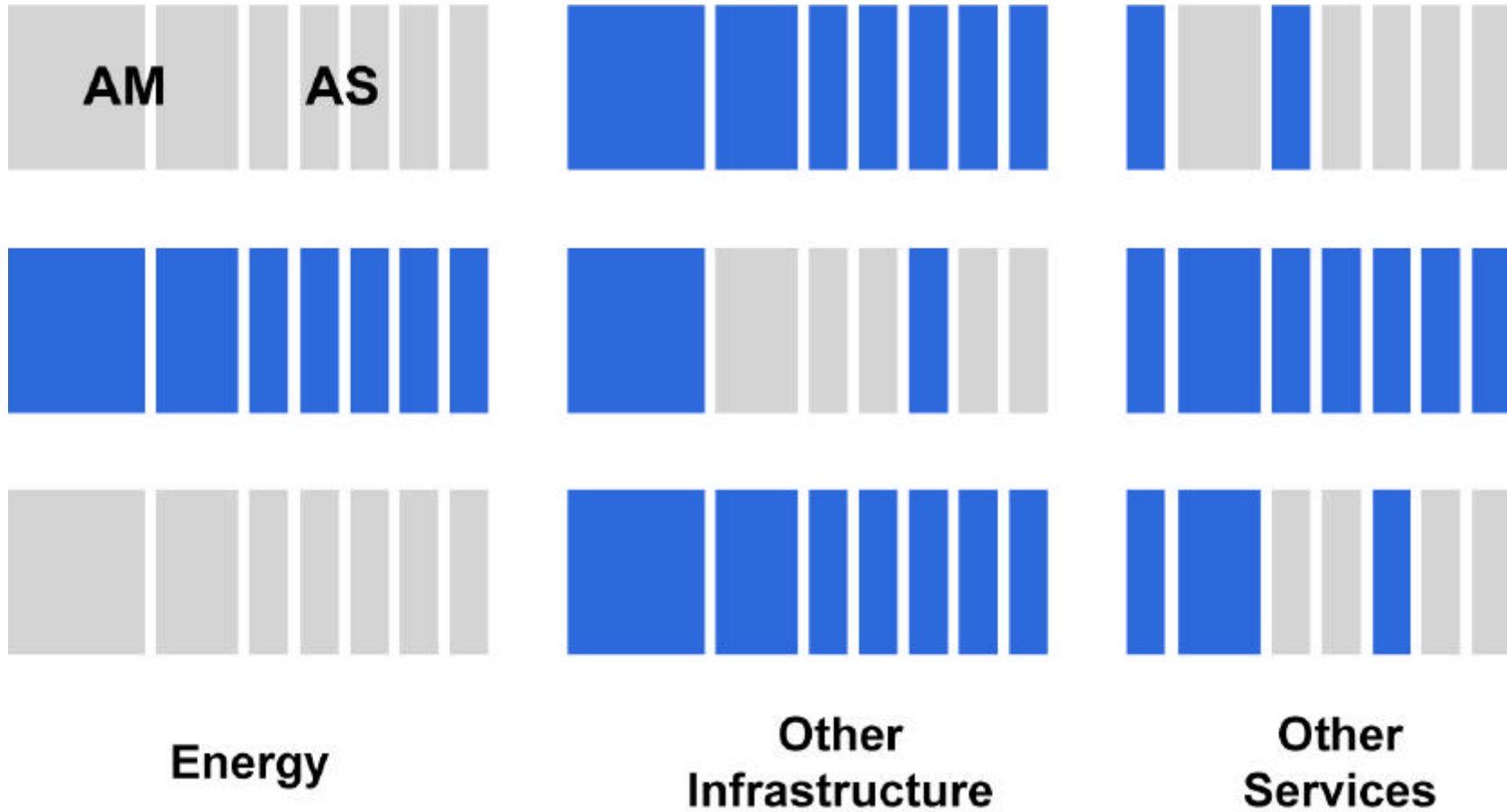


# INCREMENTAL GROWTH

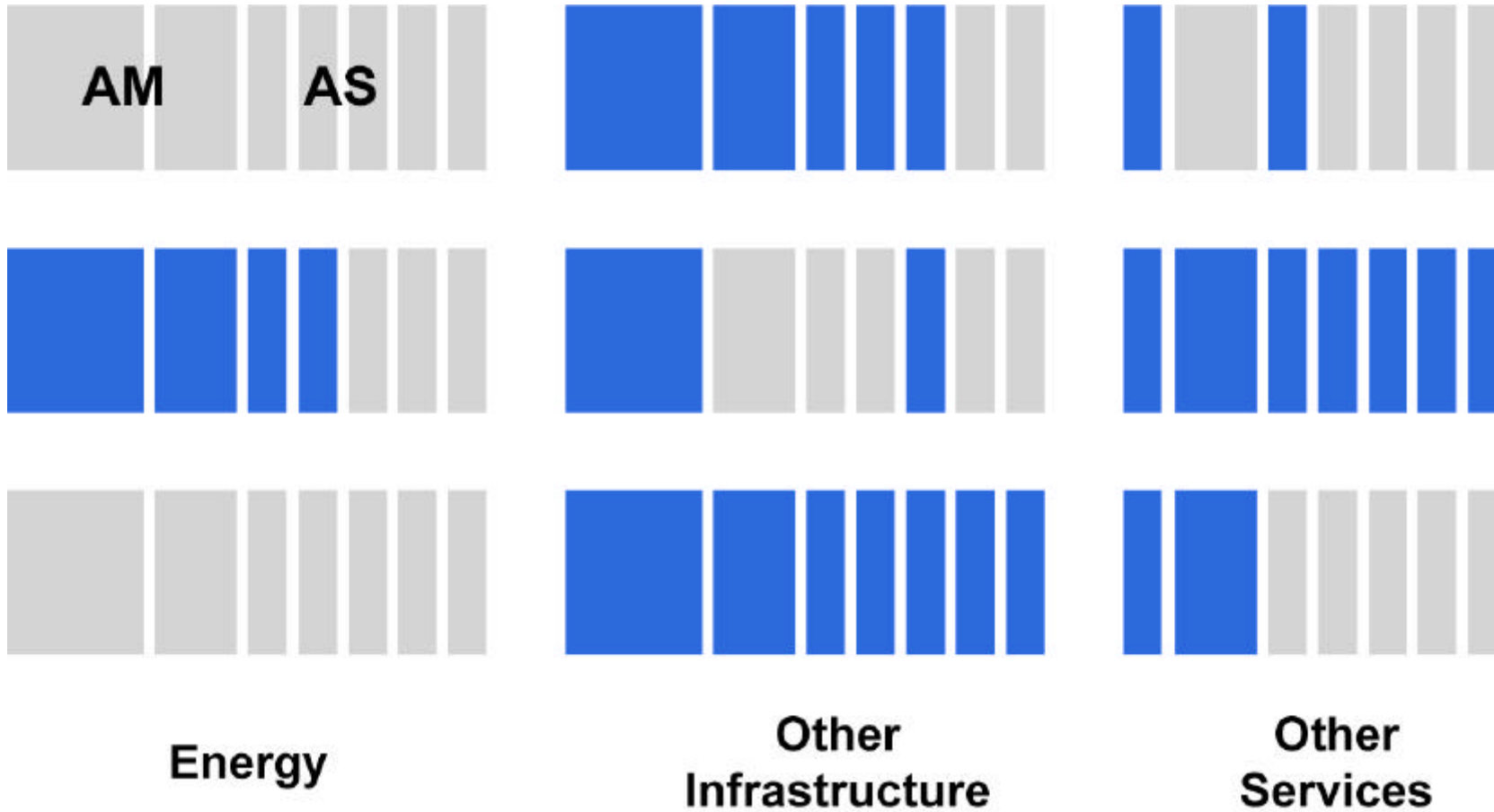
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# ACQUISITION / MERGER



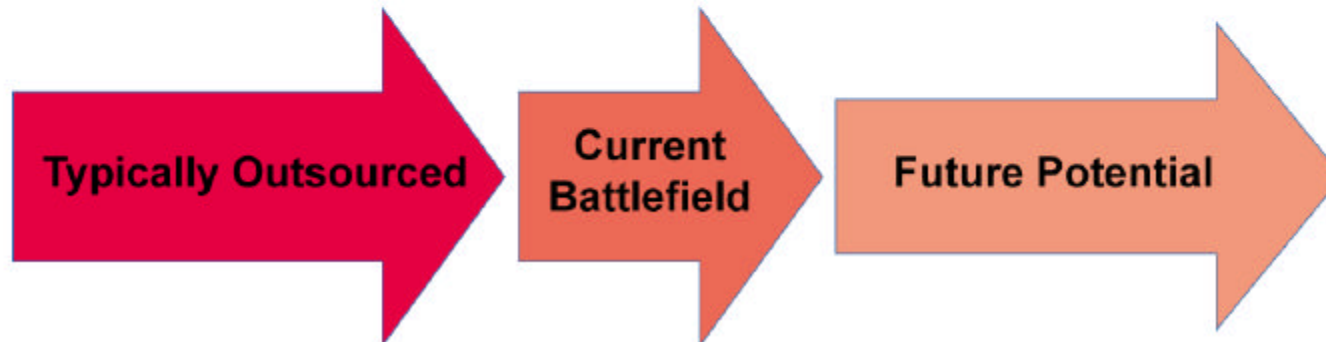
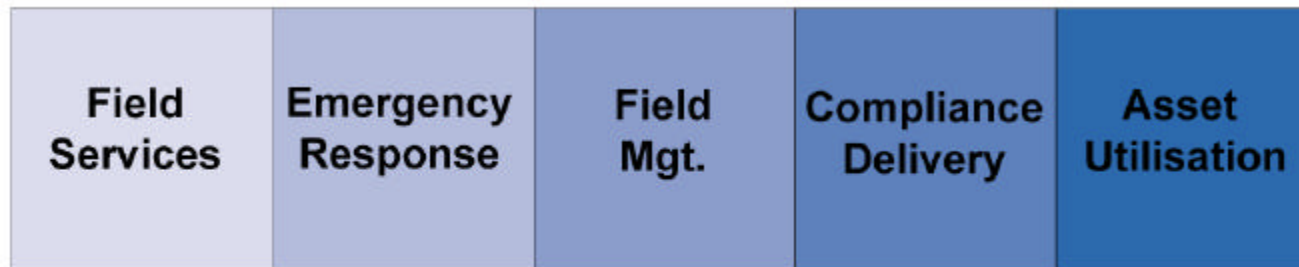
# GROWTH & ACQUISITION



# THE AGILITY MARKET

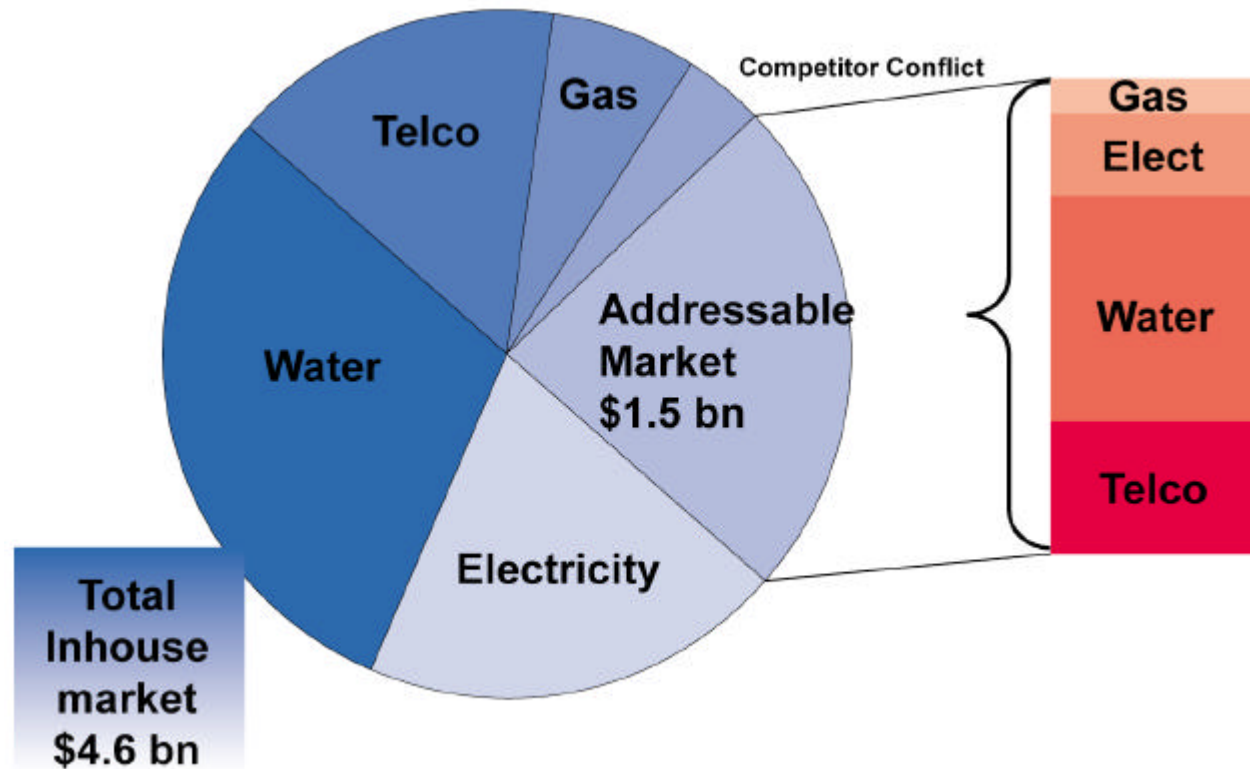
**Agility**

## *Unbundling / Outsourcing spectrum*



# AGILITY MARKET POTENTIAL

## *Management & services*



AGILITY

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## *Management and services*

- **Increased competitive and regulatory pressure will drive businesses towards a greater level of outsourcing**
- **Position Agility to take advantage of maturing outsourcing market**
  - increasing evidence of institutional investment in infrastructure industry

## *Management and services*

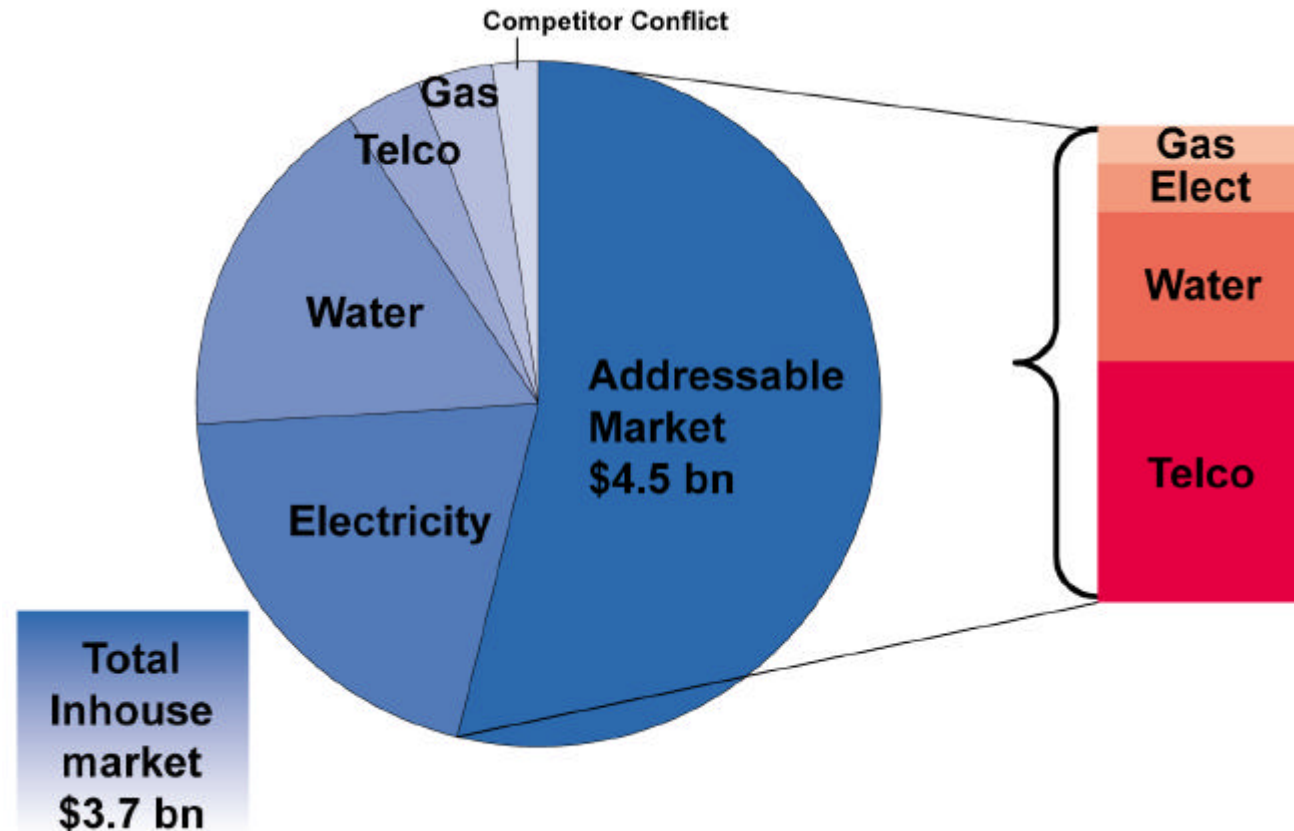
- **Australian infrastructure market and services market is large and competitive.**
- **Success Drivers**
  - Specialised skills
  - Cost position
  - Reputation/competitive position
  - Contracting capabilities

**Energy**



# AGILITY MARKET POTENTIAL

## *Construction & engineering*



## *Construction and Engineering*

- **Construction market large but subject to variability**
- **Well suited to outsourcing**

- **Success factors**

- specialised skills
- cost position
- reputation/competitive position
- scale and balance sheet

### Energy



AGILITY

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## *Why choose Agility?*

- **Asset management and services focus**
- **Compliance systems, particularly in safety and environmental areas**
- **Positioned to take advantage of industry rationalisation**
- **Strong foundation contracts with core or related businesses**

**AGILITY FOCUS**

***Agility***

- **Continue to focus on maximising returns from core and related contracts**
- **Selective expansion in step with core business growth**
- **Focus on managing operating costs and improvements in profitability**

AGILITY PURPOSE

*Agility*

*“To work in partnership  
with our clients to  
maximise the value of their  
infrastructure investment”*

AGILITY VISION

*Agility*

*“I’d rather have  
an asset managed  
by Agility”*