

# MR Oh No ... *Best Practices...*



September 2008



# Closing the day...

**What's happening  
in the MRO marketplace ?**



**Best Practices &  
Driving Forces for MRO**

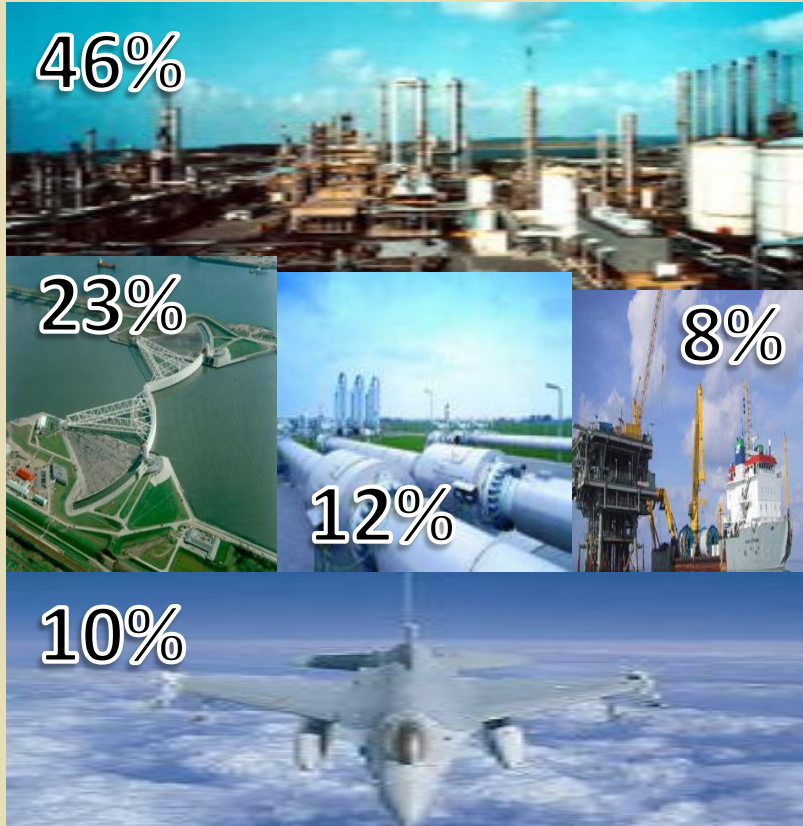


**The Future  
for MRO ....?**

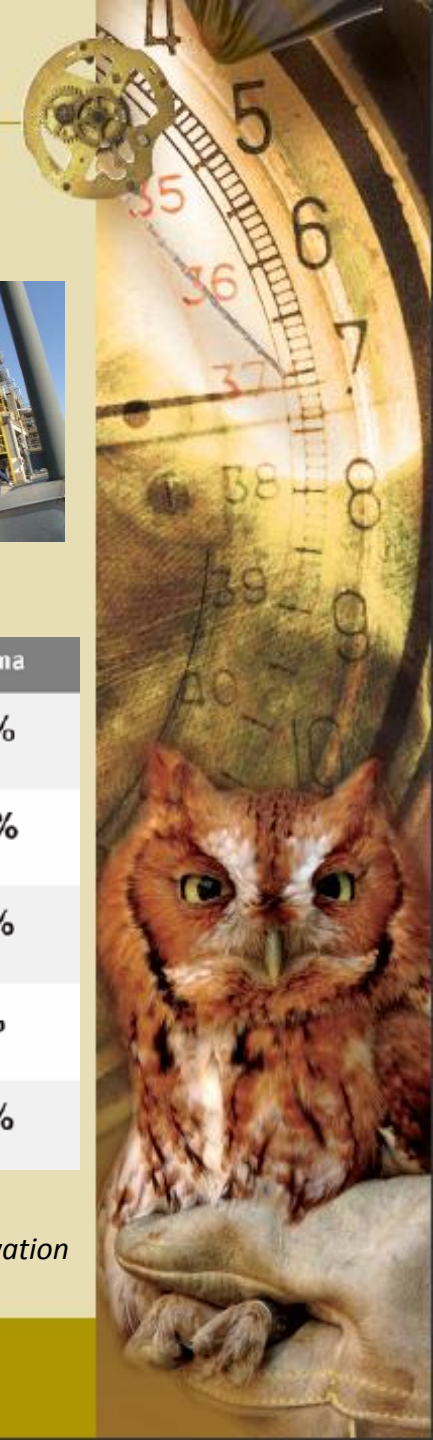


## What's happening in MRO market ?

- MRO Spend – NL only:
  - Industrial € 10 bln
  - Civil € 2 bln
- 50-60% is outsourced



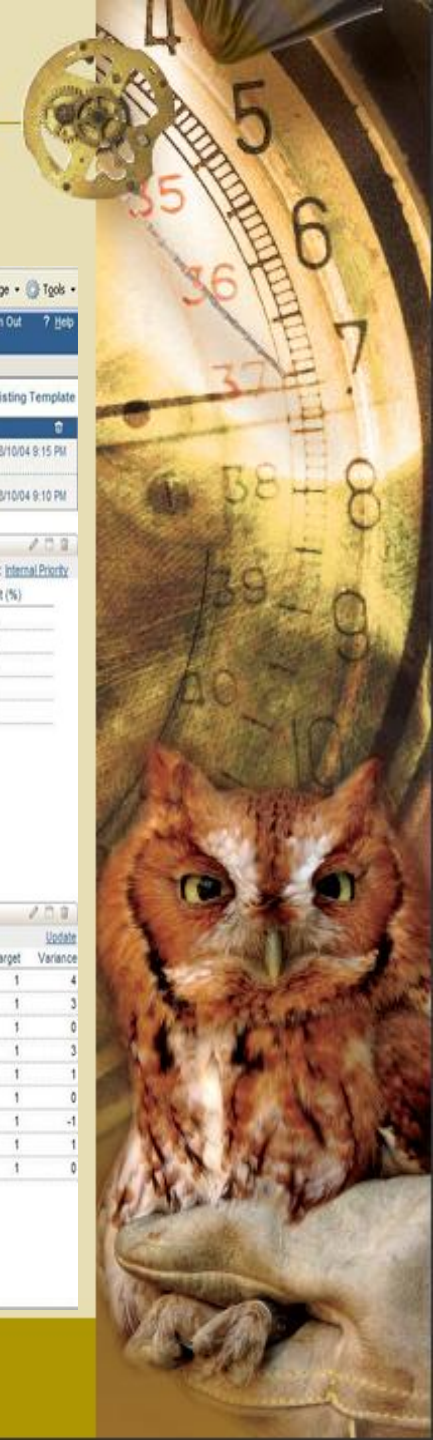
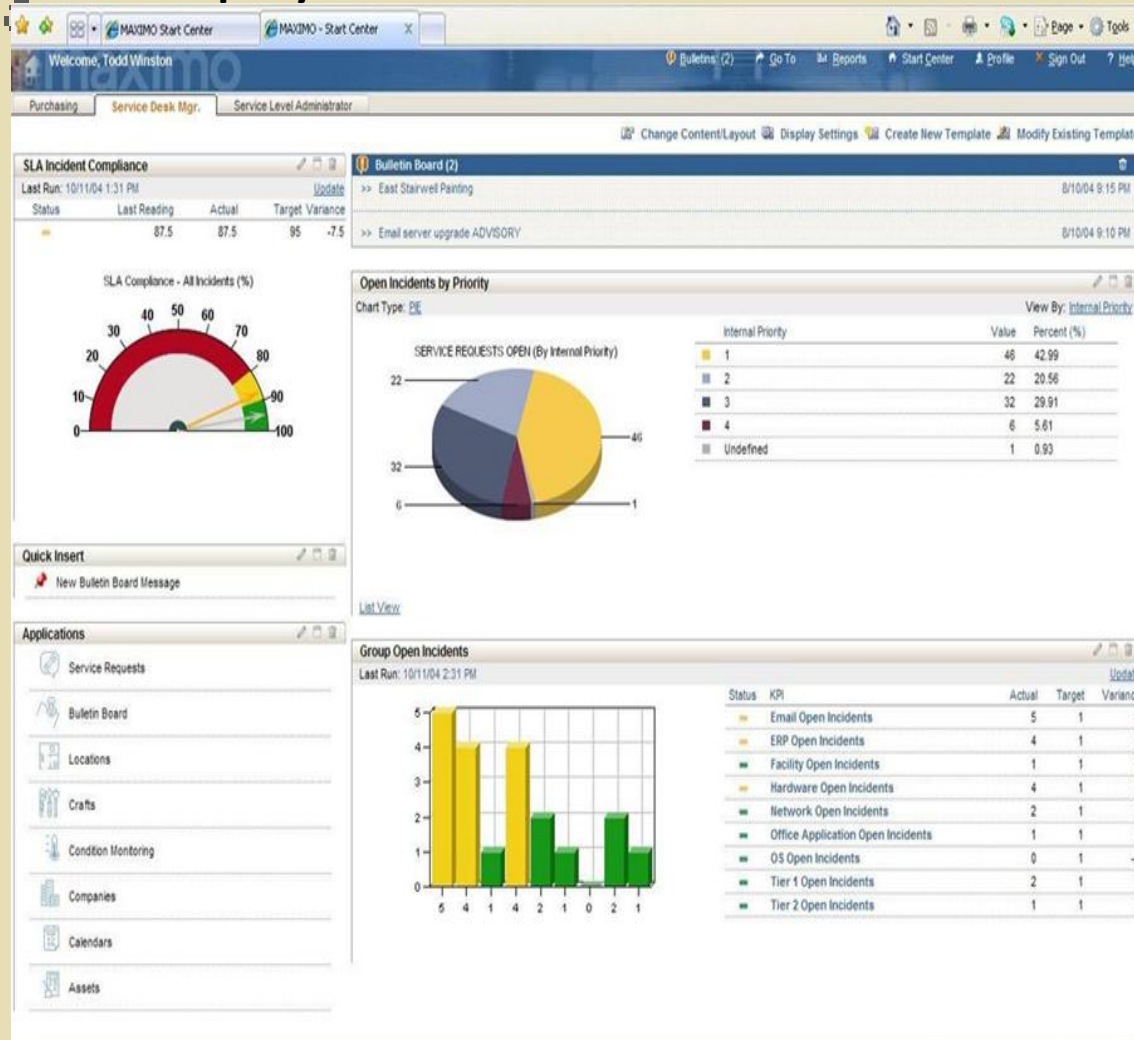
# Average KPI's in the Process Industry



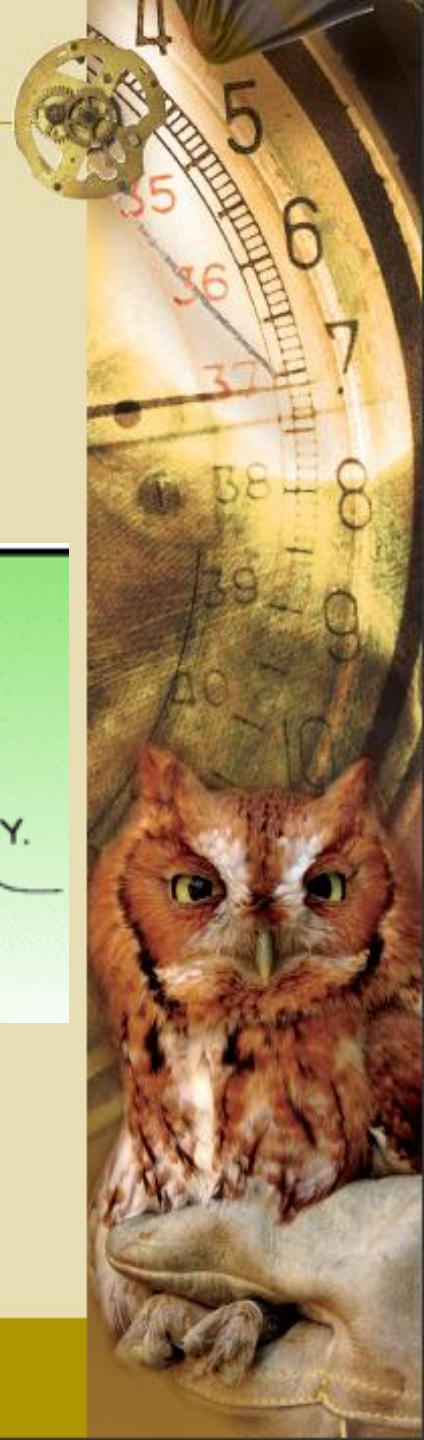
KPI	Petrochemicals	Fine chemicals	Paper	Food	Pharma
Technical availability	98%	94%	89%	93%	85%
Maintenance costs / asset replacement value	2%	3%	4.5%	3.5%	3.5%
Percentage preventive maintenance	75%	50%	65%	45%	25%
Inventory value spare parts / asset replacement value	1.5%	2%	3%	2%	4%
Percentage outsourced maintenance	60%	30%	30%	20%	35%

Source: Mainnovation

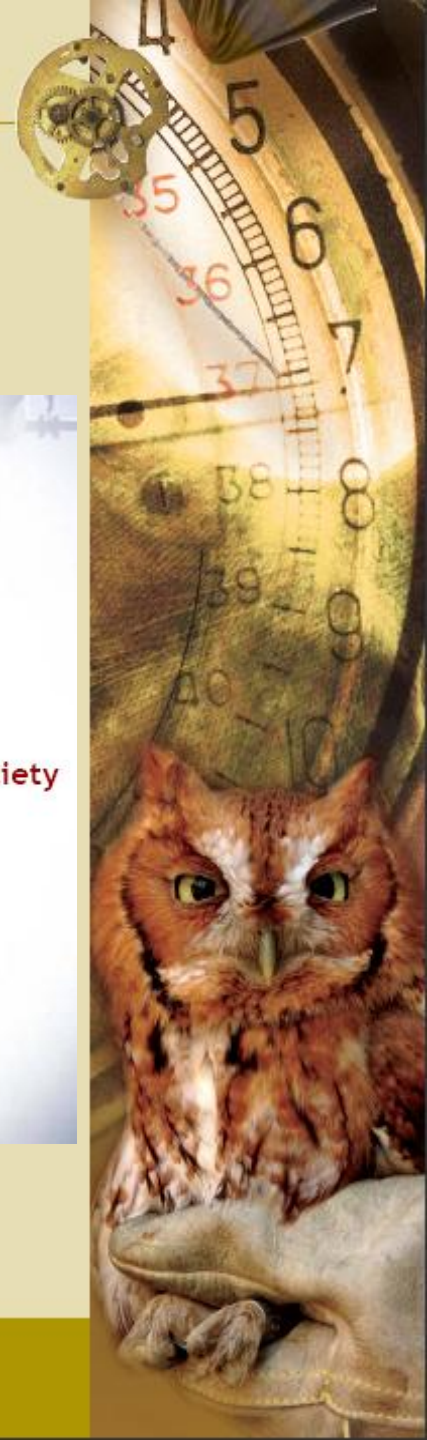
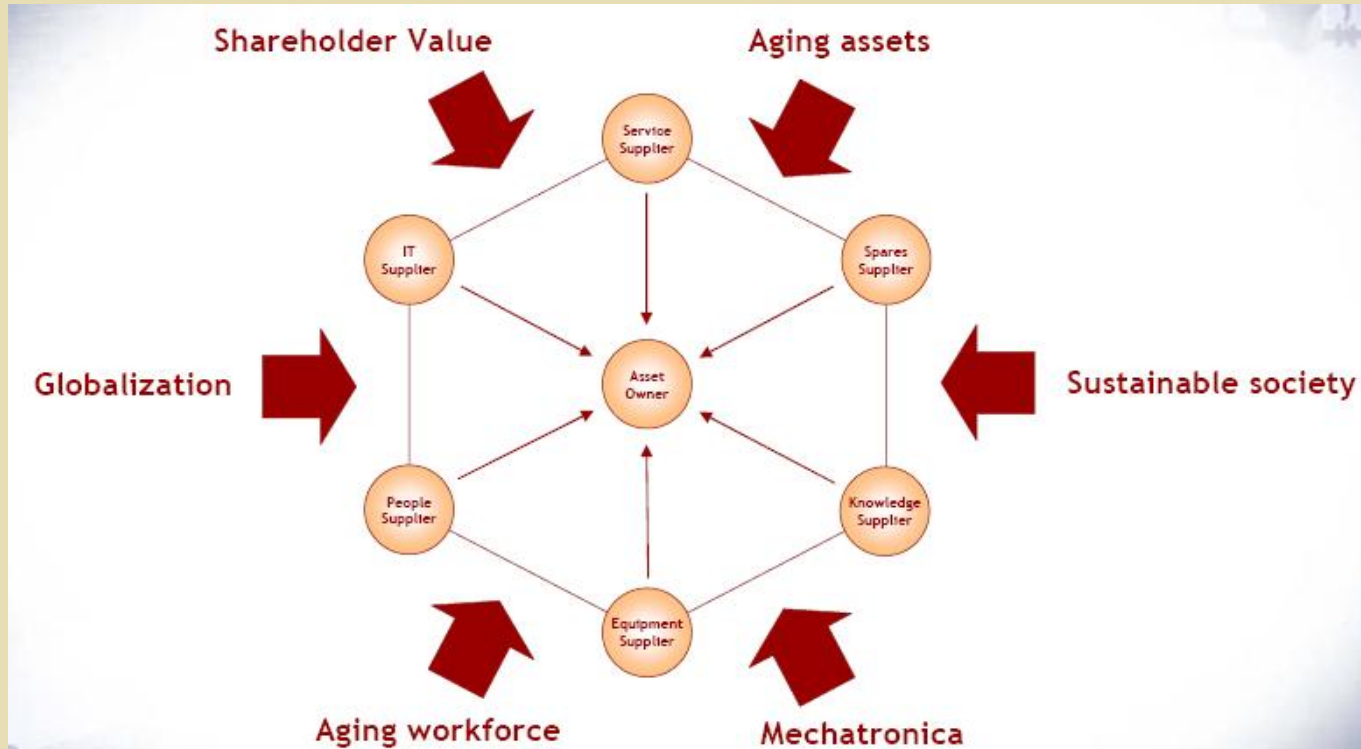
..in 2006 buys an MRO software company for \$0.7 bln...



# Best Practices...?



**Driving Forces**



# Globalization

..global competition

.....global contracts

.....global suppliers



# Aging Assets

- Most Capital intensive assets are post WO II
- Major replacement as well as end of life extension programs



# Sustainable society

DJ Sustainability Index – NL in the top with  
AkzoNobel, Unilever, Philips, TNT

SHE

People, Planet, Profit



# Aging Workforce

100.000 people employed

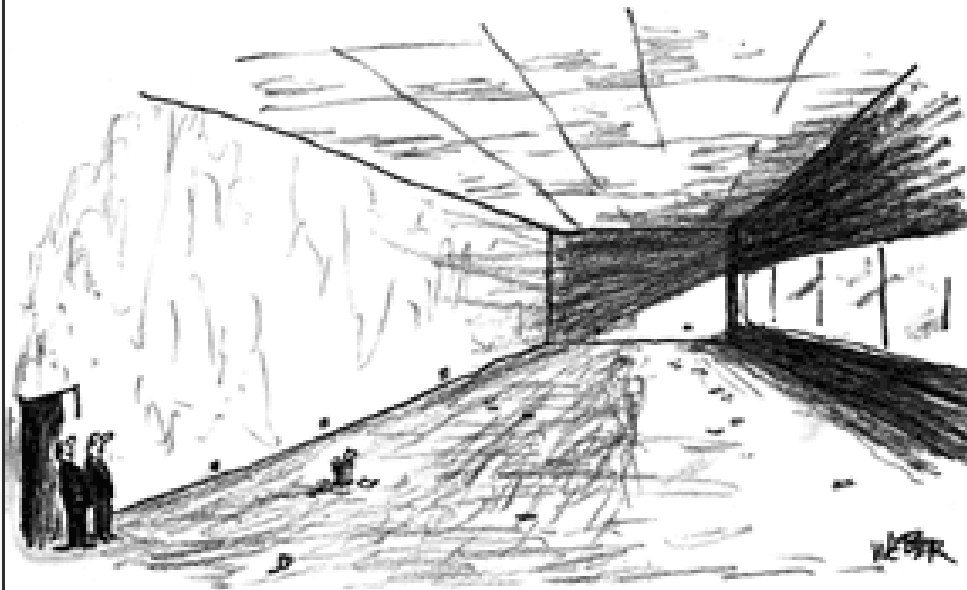
War on talent

7.500 vacancies...



# The future ..?

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*"Well, that does it Charlie—we've outsourced everything."*



**‘The moment you think you have everything  
under control....**

**you are too late!**

*Mario Andretti*

*Indy 500*



