

Challenges for the next mining investment cycle

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Turner & Townsend

making the difference

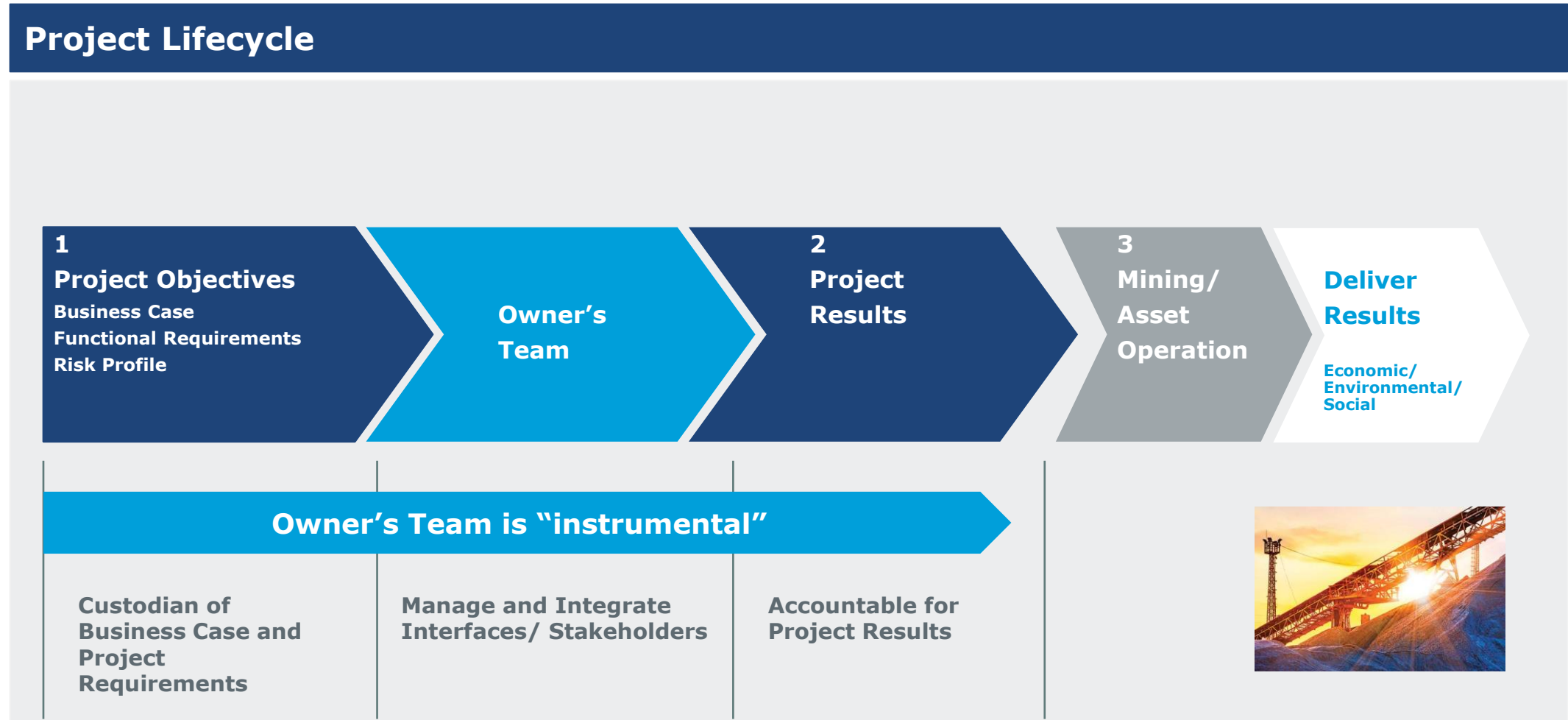


Who we are

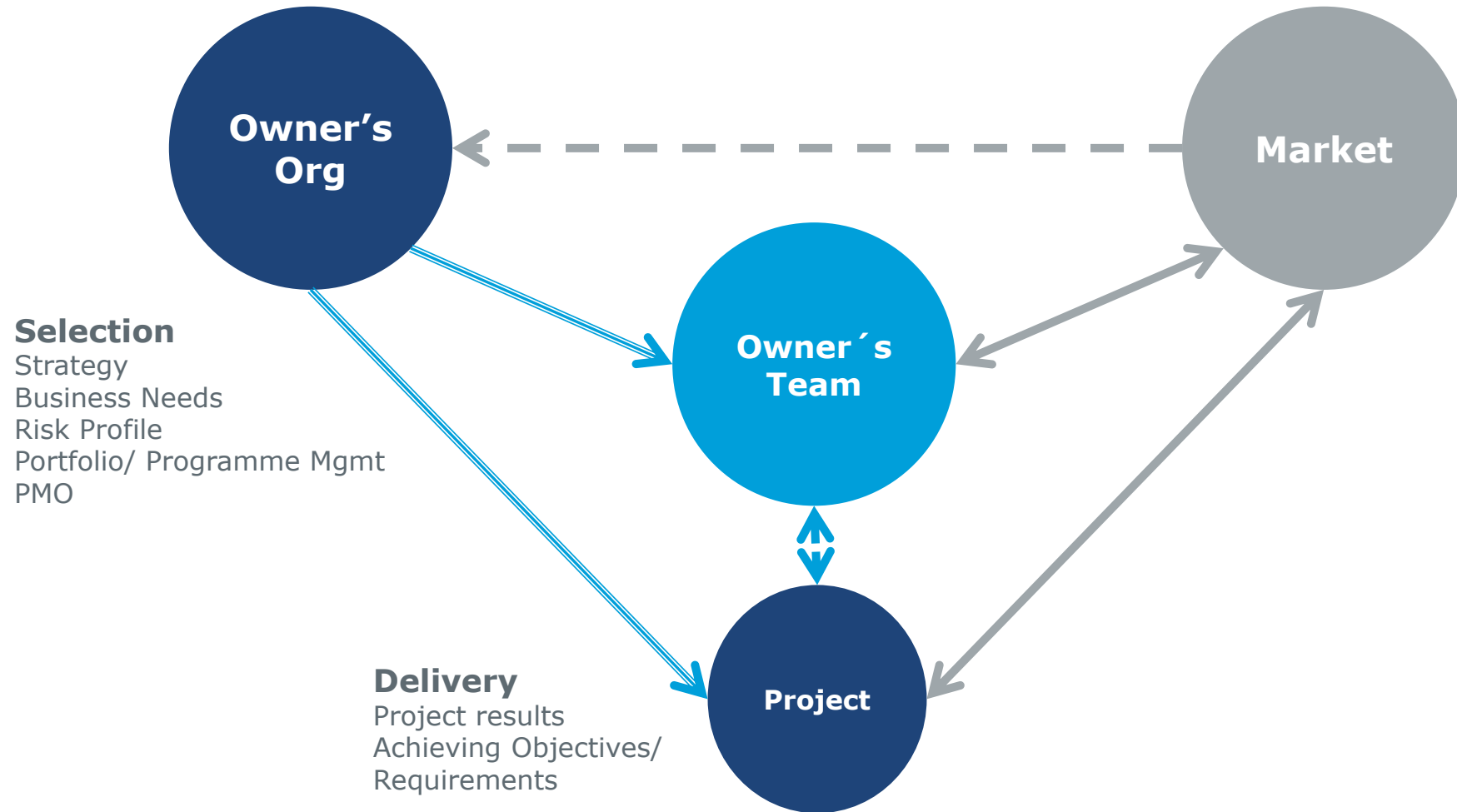
Turner & Townsend is an independent professional services company specializing in program management, project management, cost and commercial management and consulting across the **real estate**, **infrastructure** and **natural resources** sectors.

With **108 offices** in **45 countries**, we draw on our extensive global and industry experience to manage risk while maximizing value and performance during the construction and operation of our clients' assets.

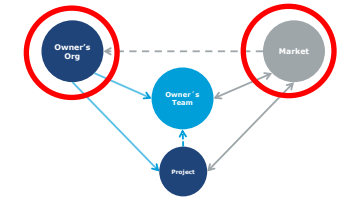
Improvement Delivery of Mining Investments



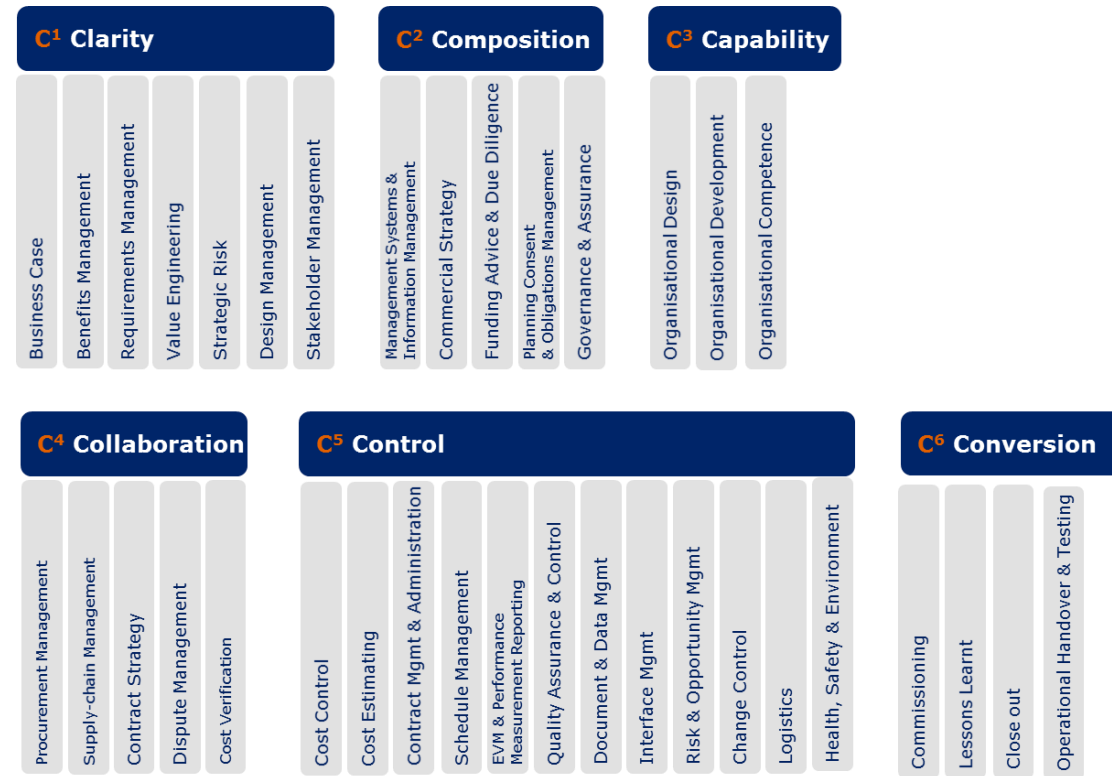
Tensions shaping the Owner's Team



Owner's Organization and Market



Organization maturity for project development (C6)

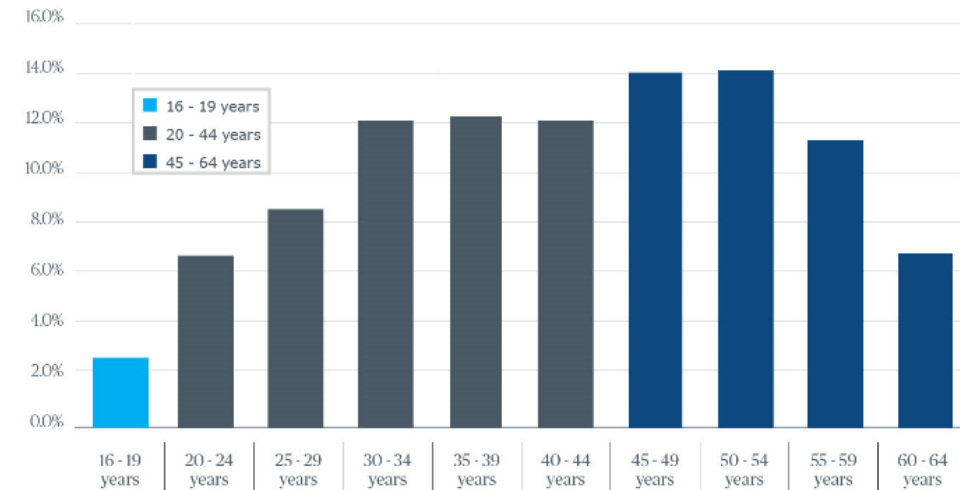


Construction

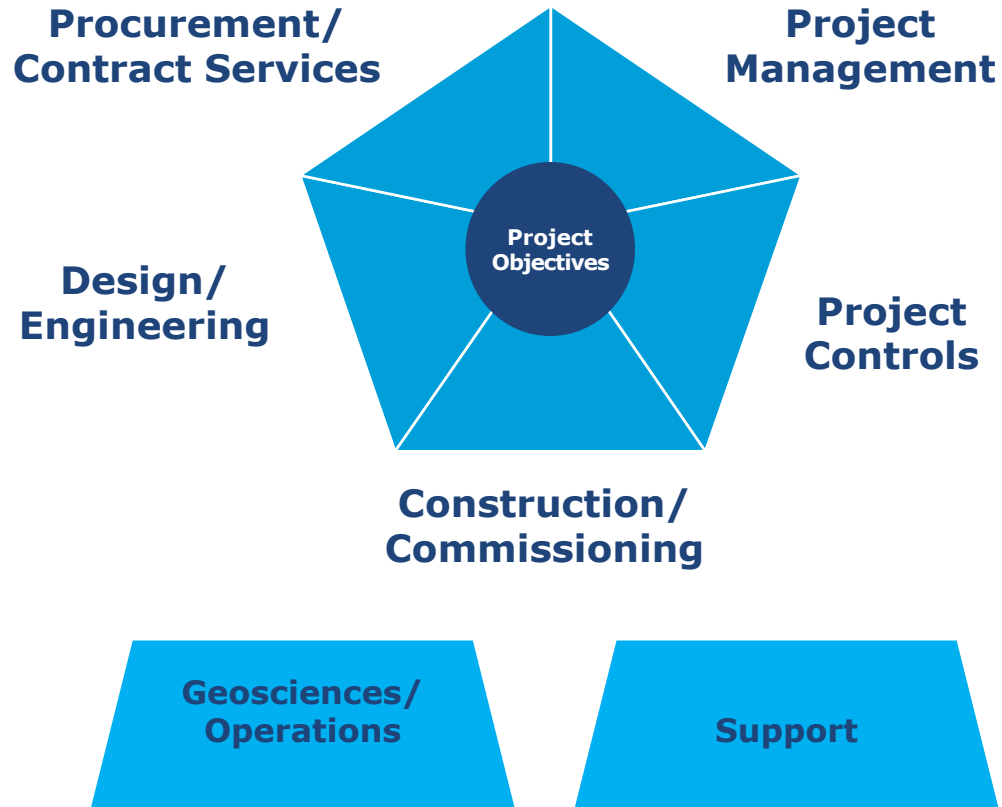
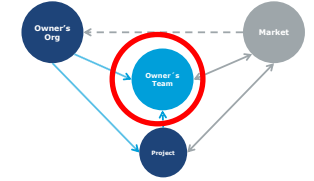
Work force productivity

Skills shortage (workforce age profile UK 2017 Q4)

Generations (Gen X vs Millenials)



Owner's Team Key Roles and Capabilities



EPC – Owner's Capabilities for Success

Governance and assurance	CAPEX, OPEX and lifecycle estimating	Commercial strategy	Design management	Contract management
Business case	Schedule management	Contract strategy	Requirements management	Expediting and logistics
Benefits management	Cost Control	Procurement management	Stakeholder management	QA/QC coordination
Management systems and information management	Change control	Contract administration	Interface management	Construction logistics
Funding advice and due diligence	Risk and opportunity management	Cost verification	Sustainability strategy and carbon management	Construction supervision
Planning consents and obligations management	Performance measurement and Reporting	Dispute management	Health, safety and environment	Commissioning
Organisational design and development	Document and data management	Supply chain management	Value engineering	Operational readiness and transition

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References and sources

Smartprojects: Risk and Innovation – International Conference (August 2018)

<https://www.alessandri.legal/PC2018/>

Gold Symposium Colombia 2018

<https://colombiagold.co/en/>

Five factors influencing the size of mine management teams

In response to current industry challenges, mining companies are looking at alternative delivery models to drive down costs and manage their risks.

<http://www.turnerandtownsend.com/en/insights/five-factors-influencing-the-size-of-mine-management-teams/>

EPCM Guide 2015 - 2016

Building on a very successful and compelling webinar discussion on how the EPCM mining space is evolving, we are pleased to present the EPCM mining guide 2015-2016, which shares insight into, and best practice on how the EPCM contract is evolving.

International construction market survey 2018

The 2018 international construction market survey brings together data and experience from 46 markets around the world, to provide an insight into the current state and direction of travel of the global construction industry. This year it also brings optimism.

<http://www.turnerandtownsend.com/en/insights/international-construction-market-survey-2018/>

Contracting in Latin America: a quick guide for foreign companies dealing with construction contracts

<http://www.turnerandtownsend.com/en/insights/contracting-in-latin-america-quick-guide-for-foreign-companies-dealing-with-construction-contracts/>

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