

BUILDING OWNER'S GUIDE TO A SUCCESSFUL BMS RETROFIT



WHAT WE'LL COVER:

1. Why do buildings undergo BMS retrofits?
2. What opportunities does a BMS retrofit provide?
3. Types of BMS retrofits.
4. Key stakeholders in a BMS retrofit.
5. The process of a BMS retrofit project.
6. Assessing price and experience.
7. The hidden factor in pricing is risk management.
8. How important is the hardware brand?
9. Maximizing project success
10. Effective commissioning for BMS retrofits
11. Consider service as part of the project outcome

1 Charles St Parramatta, NSW Police HQ

\$2.2 Million project value
9 month delivery for a project
that competitor proposals
suggested would take 18-24
months.
No downtime for major
systems.



THIS GUIDE IS BASED ON DEEP RETROFIT EXPERIENCE

OzTech are specialists in BMS retrofits, having successfully **completed dozens of high-profile BMS retrofit projects**. We focus on existing sites, where our deep experience allows us to manage complex upgrades while keeping existing systems operational.

Our team is **skilled across multiple platforms**, enabling parallel build and migration without disrupting critical operations. Managing live buildings comes with unique challenges—maintaining tenant comfort, navigating outdated or inaccurate as-builts, and working around systems that cannot tolerate downtime.

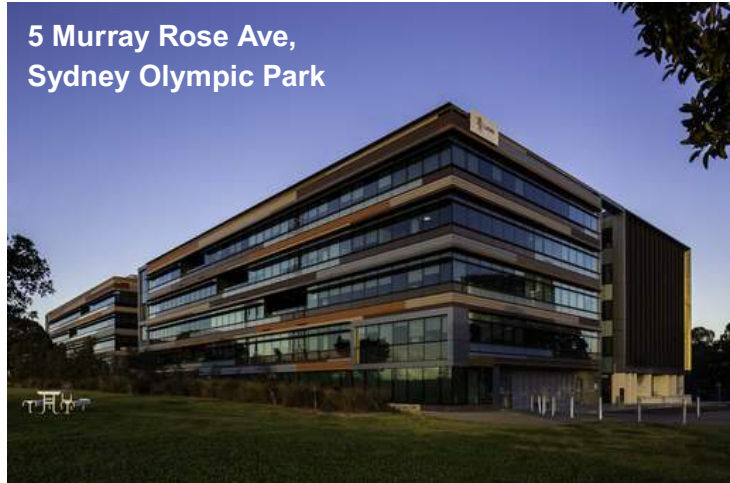
As a mid-sized company, **our technicians are true experts** who wear multiple hats, providing the precision and flexibility required to deliver these complex upgrades successfully.

SOME OF OUR RECENT RETROFITS

10 Smith St,
Parramatta



5 Murray Rose Ave,
Sydney Olympic Park



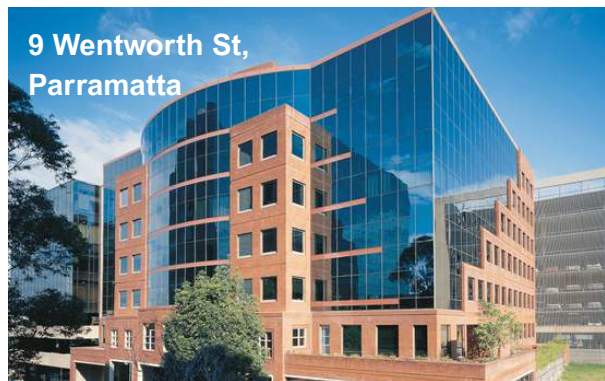
22 Pitt St, Sydney



468 St Kilda Rd,
Melbourne



WHAT MAKES US EXPERTS?



Other recent retrofits:

- 295 Queen St, Melbourne
- 10 Valentine Ave, Parramatta
- 11 Julius Ave, North Ryde
- 2–14 Elsie St, Burwood
- 197–201 Coward St, Mascot
- 162 Blues Point Rd, McMahons Point

WHY DO BUILDINGS UNDERGO BMS RETROFITS?

Building owners and managers pursue retrofits for a range of strategic and operational reasons. The most common drivers include:

- **Ageing and unreliable hardware** – As existing systems deteriorate, performance issues and downtime increase.
- **Enhanced functionality** – Modern BMS platforms enable smarter controls, automation, and system optimisation beyond what legacy systems can deliver.
- **Advanced data analytics** – Owners are increasingly seeking actionable insights from building data, which older systems cannot provide.
- **Portfolio-level reporting** – Larger property groups require consolidated data and compliance reporting across assets, often only achievable with modern solutions.
- **Hardware obsolescence** – Replacement parts for legacy systems become scarce as manufacturers discontinue old product lines. This can make repairs increasingly costly.
- **Greater service flexibility** – Proprietary systems often tie owners to a single vendor. Open-source platforms unlock vendor choice, competitive pricing, and future optionality.

WHAT OPPORTUNITIES DOES A BMS RETROFIT PROVIDE?

Upgrading to a modern BMS unlocks a wide range of benefits for building owners and managers. The key opportunities include:

- **Extended asset life cycle** – A retrofit can add 10–15 years to the effective operating life of building systems.
- **Better service value** – Modern platforms streamline fault-finding, improve data access, and reduce time lost to clunky navigation, allowing technicians to focus on problem-solving and optimisation.
- **Enhanced cybersecurity** – Contemporary BMS solutions are designed with robust security features to mitigate growing digital risks.
- **Greater vendor flexibility** – Moving from proprietary to open platforms gives owners the freedom to choose among integrators, driving competitive pricing and higher service quality.
- **Improved efficiency and scalability** – New controls and analytics enable smarter energy use, operational savings, and the flexibility to adapt as the building's needs evolve.
- **Future-proof technology** – Platforms such as Tridium Niagara lead the global market, offering regular updates and the broadest integration with third-party systems.

TYPES OF BMS RETROFITS

There are two main approaches to BMS retrofits

Complete retrofit

This involves replacing the entire controls system in one major operation. It's most effective when there is sufficient capital budget available, or when a major tenant is vacating and the building is already scheduled for broader upgrade works during a period of lower occupancy.

Staged retrofit

This approach allows building owners to spread investment over multiple years. It is particularly suited to ageing buildings where hardware failures are already creating operational risks.

Typically, the highest-risk components are addressed first—for example, upgrading the head end to remove the risk of total system failure. From there, network and communications infrastructure is replaced so legacy controllers can still be operated, followed by central plant systems (AHUs, chillers, cooling towers, pumps), and finally floor controls as needed.

KEY STAKEHOLDERS IN A BMS RETROFIT

A successful BMS retrofit requires alignment across multiple stakeholders, each with distinct roles and expectations:

- **Building Owners** – Set the vision and investment rationale. They need confidence in the long-term value of the retrofit, whether it's lifecycle extension, higher asset value, or improved energy performance.
- **Facility Managers** – Act as the day-to-day custodians. Their involvement is critical from planning through delivery and into operations. A “soft landings” approach ensures they are supported during handover and service.
- **BMS Consultants** – Define project scope, technical requirements, and quality standards. They work closely with integrators to ensure the system meets performance specifications.
- **Sustainability Consultants** – Provide input on energy efficiency and reporting requirements, ensuring alignment with NABERS, Green Star, or broader ESG goals.
- **Mechanical Contractors** – Coordinate with the BMS provider to ensure plant equipment and controls integrate seamlessly with the upgraded system.
- **Tenants** – Require clear communication around project impacts, timelines, and benefits. Managing their expectations avoids disruption and builds goodwill.

THE PROCESS OF A BMS RETROFIT PROJECT

A retrofit project typically follows a clear, staged process to ensure transparency, minimal disruption, and long-term value:

1. **Scoping** - Building owners and consultants will discuss their goals in depth, and start to define what they want to achieve.
2. **Tender** – Building owners or consultants issue a tender outlining the project scope and objectives.
3. **Proposal Review** – Submissions are assessed on technical merit, methodology, cost, and value-adds.
4. **Interviews** – Shortlisted integrators present their approach, experience, and solutions.
5. **Project Award** – The successful contractor is formally appointed and contracts are executed.
6. **Kickoff** – Stakeholders align on scope, timeline, communication protocols, and risk management.
7. **Project Delivery** – Hardware installation, programming, integration, and on-site works are carried out in stages.
8. **Commissioning** – Systems are tested, tuned, and validated against the specification and functional design brief.
9. **Defects Liability Period (DLP)** – A 12–24 month period where issues are resolved, tuning continues, and optimisation is supported.
10. **Service** – Ongoing maintenance, monitoring, and reporting to ensure performance targets (e.g., NABERS) are met.
11. **Future Planning** – Insights from the system guide future upgrades, energy strategies, and portfolio-wide initiatives.

ASSESSING PRICE AND EXPERIENCE

Building owners often choose their BMS retrofit partner based on price and experience. Cost should always be considered against proven expertise and the provider's fit for the specific site.

PRICE

The tender process typically uncovers a wide spread of pricing from different integrators. The cost of a project depends on several underlying factors:

- **Company overheads** – Larger companies often carry higher operational costs, requiring bigger project margins than smaller, more agile integrators like Oztech.
- **Hardware pricing** – Integrators source hardware from different vendors and at different rates, impacting overall project costs.
- **System architecture** – The design approach heavily influences cost. An experienced pre-sales team can design a solution that is not only cost-effective but also best suited to the building's needs.
- **Project understanding** – Site conditions, existing hardware, and integration challenges all affect cost. A provider that fails to account for these risks upfront often creates problems downstream.
- **Business model** – Some integrators submit low initial bids but rely on costly variations or inflated service charges later.

ASSESSING PRICE AND EXPERIENCE

EXPERIENCE

The strongest safeguard against delays, variations, and quality issues is working with a BMS integrator that has delivered similar projects successfully. When evaluating experience, look for:

- **Proven delivery of comparable projects** – Has the team executed projects of similar size, scope, and complexity?
- **Strong references and case studies** – Can they demonstrate measurable outcomes such as NABERS improvements, reduced tenant disruption, or energy savings?
- **Partnership track record** – Do they have established relationships with trusted contractors, consultants, and hardware vendors?
- **Depth of technical expertise** – A team that understands both legacy and modern systems can design retrofit strategies that avoid costly missteps.



66 Goulburn St, Sydney

Oztech retrofit from proprietary software to a tridium niagara head end and JCI FX Controllers.

800k Project Value.

On track for 5.5 Star NABERS Rating.

20% reduction in energy over 12 months.

THE HIDDEN FACTOR IN PRICING IS RISK MANAGEMENT.

THE IMPACT OF INEXPERIENCE

Poor planning often results in cost blowouts, delays, and disruptions:

- Projects that overrun timelines can cause major tenant disruption, delayed move-ins, and lost rental income.
- We've seen projects awarded to lower-cost bidders drag on for months beyond schedule because the contractor lacked the foresight to plan for access issues, compatibility risks, or missing equipment. These gaps often lead to significant variations and frustration.

Fundamentally, inexperienced BMS companies can come in low on price due to a poor initial site and contract assessment - leading to project delays, costly variations, and a poor project delivery.

St Andrew's College, Sydney

Retrofitted 60+ FCU's, 20 AHUs, 60+ induction units within a strict two week school holidays period. Retrofitted aging pneumatic hardware and incompatible DDCs (direct digital controls).



HOW IMPORTANT IS THE HARDWARE BRAND?

When considering a BMS retrofit, it's important to remain open-minded about the hardware solution used. **Many BMS contractors specialize in a single platform**, meaning they often apply the same solution to every project —“when all you have is a hammer, everything looks like a nail.”

Proprietary systems can offer powerful capabilities, but the key risk is **vendor lock-in**: after a few years, you may have limited options for service or upgrades.

The ideal approach is to select the hardware that best matches your existing infrastructure, rather than forcing a particular solution onto your site.

At OzTech, we are multi-vendor, allowing us to choose the most appropriate hardware for your building. This approach can deliver lower costs, reduced risk, and faster project timelines, while ensuring your BMS is tailored to your specific needs.

Most importantly, you want a great service provider with a reputation of completing projects successfully.



MAXIMIZING PROJECT SUCCESS

1. Gather up-to-date as-built documentation

Working with outdated or incomplete OEM drawings can create major delays once the project team arrives on site. Having accurate as-built documents helps ensure precise pricing and minimizes unexpected project delays.

2. Secure administrative passwords and access credentials

Many owners don't have these readily available, which can lead to wasted time chasing the incumbent BMS provider. Ensuring all passwords and access details are collected in advance helps keep the project on schedule.

255 Pitt St, Sydney

Oztech took over the service contract for the site in early 2025 and have already delivered a 42% reduction in chiller consumption, saving 127,000kWh in the first five months. Since then we have begun a number of works including electrical and thermal metering upgrades, VSD installations and chiller replacement works.



MAXIMIZING PROJECT SUCCESS

3. Choose a BMS partner with strong communication

A successful project requires clear, consistent updates. You want to know what's happening, what's coming next, and any potential issues before they arise. The right project team will provide transparency, highlight challenges, and guide you toward successful outcomes.

4. Demystify the BMS process

BMS systems can seem like a “black box” during a retrofit. A proactive partner will help you see progress in real time—for example, by bringing commissioned systems online as they are completed. This approach allows you to track which systems are operational, reducing uncertainty and building confidence in the process.

World Square Retail, Sydney

> \$1 million total project value
Resulted in 30% energy savings.
Oztech delivered a full BMS and ICN infrastructure upgrade, with a seamless transition from legacy systems to open architecture.



EFFECTIVE COMMISSIONING FOR BMS RETROFITS

Take a soft landings approach

Engage the facility manager (FM) throughout the commissioning process. Show what is being installed, what is operational, and what still requires attention. This transparency helps the FM understand the system, anticipate outcomes, and feel confident in managing the building post-project.

Conduct robust training and handover

At the end of the project, ensure thorough training for building staff and a complete handover of all system documentation. A well-trained team ensures smooth ongoing operations and reduces reliance on external support.

77 Market St, Wollongong

Recent successful Oztech retrofit from proprietary software to an open source platform.

600k Project Value
Phased upgrade



CONSIDER SERVICE AS PART OF THE PROJECT OUTCOME

A retrofit is not just a project—it's the start of a long-term relationship with your BMS provider. Good service yields better results for your building. To choose the right provider:

- Speak with peers in the industry to identify BMS providers known for strong communication, high-quality service, and proactive guidance. Avoid providers with reputations for being “painful at every step.”
- Evaluate their communication and transparency—are they easy to reach and responsive to questions?
- Assess integrity and reliability—do they provide clear, predictable pricing, or do they rely on constant variations?

By focusing on these areas, commissioning becomes a foundation for ongoing system performance, operational efficiency, and a productive long-term relationship with your BMS provider.

Citadel Towers, Chatswood

1.5 NABERS Energy Star improvement
>\$1 million project value.

Installed advanced BMS controls with predictive maintenance which enabled improved tenant comfort, increased energy consumption and better reliability.

OUR SERVICES

BMS Retrofits



BMS Service



BMS Audits



BMS Engineering



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