

THE INTERNATIONAL PRECAST ASSOCIATIONS SUMMIT



EUROPE 2011



MARTIN CLARKE

**British Precast – the trade
federation for the £1.8 billion
UK precast sector
Over 650 factories within the
UK**



BRITISH PRECAST MEMBERSHIP

60 Full Members –

**Precast Concrete
Manufacturing Companies**

102 Associate Members –

**Material & Plant Suppliers,
Consultants,
Academia, etc**

International Associates

Members of the MPA but separate legal entity



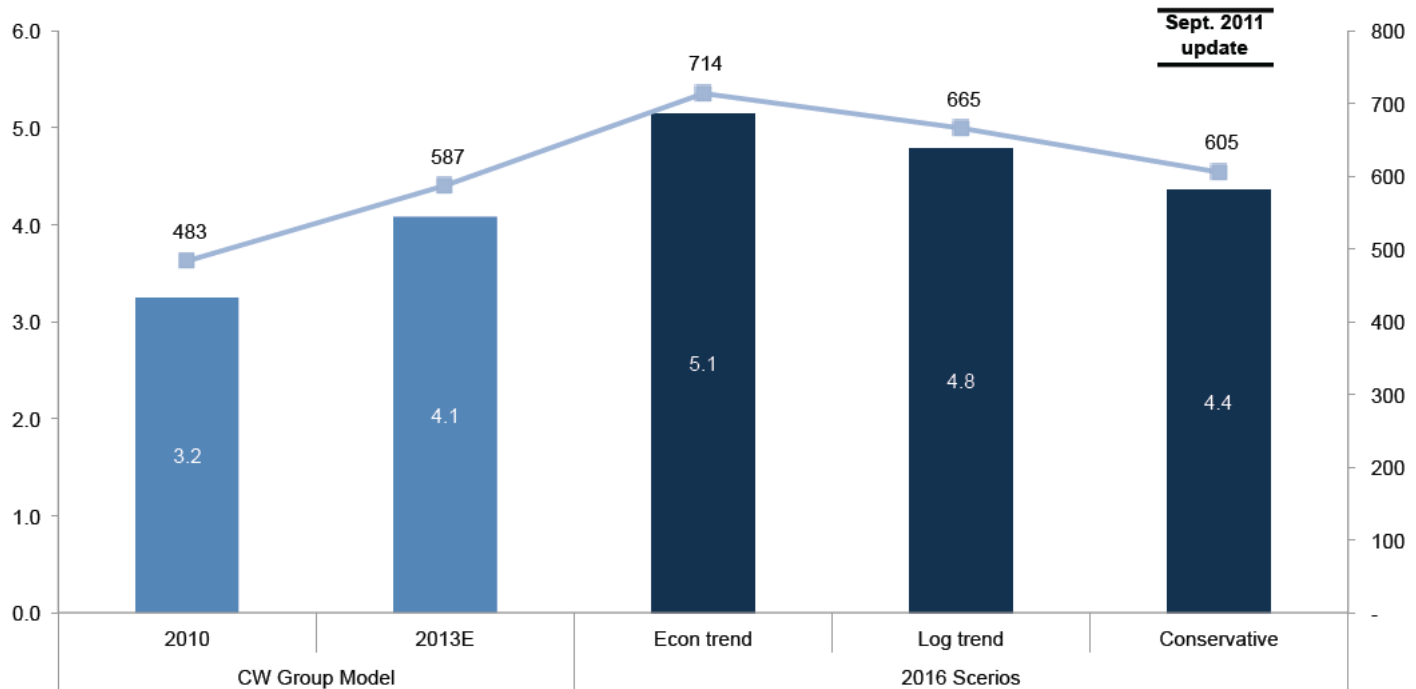
Problem – market is small – down 40% since 2007-8

Main world producers - The G-20 Group

Country	Cement production° (Million tonnes)						
	2000	2005	2006	2007	2008	2009	2010 ^P
China	597.0	1 068.8	1 236.8	1 361.2	1 388.4	1 650.0	1 868.0
India	102.5	142.7	159.0	170.5	183.3	186.9	210.0 e
European Union	229.9	248.0	264.8	271.0	251.7	201.5	190.4
USA	87.8	99.3	98.2	95.5	86.3	63.9	65.5
Turkey	36.0	42.8	47.4	49.3	51.4	54.0	62.7
Brazil	39.8	38.7	41.4	45.9	51.6	51.4 ^P	58.9 e
Japan	83.3	68.7	69.9	67.8	63.0	54.9	51.7
Russian Federation	32.4	48.7	54.7	59.9	53.5	44.3	50.4
Korea, Rep. of	51.3	47.2	49.2	52.2	51.7	50.1	47.2
Saudi Arabia	18.2	26.1	27.0	30.3	37.4	37.8	41.0 e
Mexico	32.3	36.0	38.8	39.5	38.3	37.1	38.9
Indonesia	27.8	33.9	33.0	35.0	38.5	36.9	37.8
Italy	38.9	46.4	47.8	47.4	43.0	36.3	c
Germany	35.4	31.2	32.9	32.3	32.5	30.0	c
France	19.2	20.9	22.0	22.1	21.2	18.3	c
Canada	12.8	13.5	14.3	15.1	13.7	11.0	12.4
South Africa*	8.2	12.1	13.1	13.7	13.4	12.0	12.0
Argentina	6.1	7.6	8.9	9.6	9.7	9.4	10.4
Australia	7.5	9.1	9.2	9.6	9.7	8.7	9.3 e
United Kingdom	12.5	11.6	12.1	12.6	10.5	7.8	c

GLOBAL CONSUMPTION OUTLOOK

2010, 2013 & 2016 scenarios (LH-axis: total in bn ton; RH-axis: Global kg per capita)

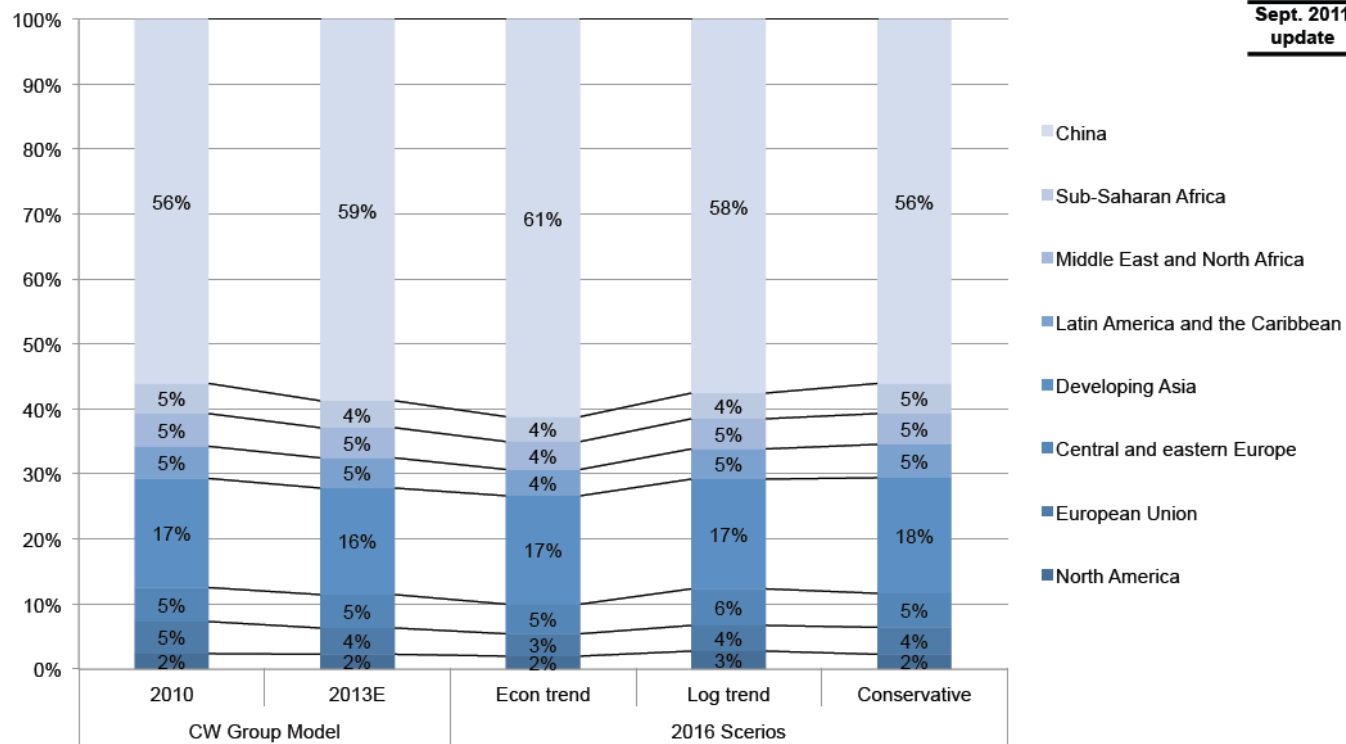


Source: CW Group Research



REGIONAL DEMAND BREAKDOWN

Regional share (% of global consumption)



Source: CW Group Research



Product Groups

British Precast are responsible for 13 Product Groups:

**Aircrete Products Association,
Architectural Cladding Association,
Box Culvert Association,
Concrete Block Association,
Concrete Pipeline Systems Association,
Concrete Sleeper Manufacturers Association,
Concrete Tile Manufacturers Association
Interlay
Interpave,
Precast Flooring Federation,
Structural Precast Association
Construction Packed Products Association
Modern Masonry Alliance**



Product sector campaigns

- **Masonry – pulverise timber-frame on every issue !; alliances with house-builders; fire**
- **Paving – sustainable drainage; operative training stds**
- **Flooring – upper floors in houses**
- **Roof tiles – technical standards**
- **Structures – student teaching packages**
- **Pipeline systems – LCA and fighting off importers**
- **Box culverts – technical standards**
- **Cladding – environmental ratings**
- **Rail products – growth market opportunities !!**



Issues - overarching

Raising safety performance

Improving sustainability

Lobbying – www.GetBritainBuilding.org

Standards and Codes – EPDs, CE Marking, BIM

**Training Centre – in support of Safety by
Competence**

Innovation and Research

PRECAST2012 May 17 Leicester

RAISING THE BAR





Why the Charter Scheme ?

Why Raising the Bar ?



Equal drivers

- **Response to national and international pressures**
- **Business improvement across the board – safer, more sustainable, more efficient and more profitable industry.**



What are the Revitalising Health and Safety Targets ?

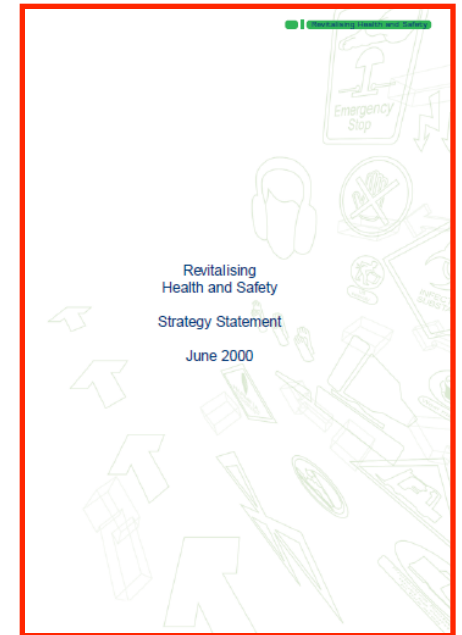
The Revitalising targets for the health and safety system are to:

+ reduce the number of working days lost per 100,000 workers from work-related injury and ill health **by 30% by 2010;**

+ reduce the incidence rate of fatal and major injury accidents **by 10% by 2010;**

+ reduce the incidence rate of cases of work-related ill health **by 20% by 2010;**

+ achieve **half** the improvement under each target **by 2004.**



July 2007

This policy statement confirms the Government's intention for all new homes to be zero carbon by 2016 with a major progressive tightening of the energy efficiency building regulations - by 25 per cent in 2010 and by 44 per cent in 2013 - up to the zero carbon target in 2016



Building a Greener Future: policy statement

www.communities.gov.uk
community, opportunity, prosperity



2012 CONSTRUCTION COMMITMENTS

PROCUREMENT & INTEGRATION

A successful procurement policy creates robust contracts, enables best value to be achieved and encourages the early involvement of the supply chain. An integrated project team works together to deliver the best possible solution in terms of design, buildability, environmental performance and sustainable development.

- Procurement strategies will be transparent, visible or best value rather than lowest cost, and facilitate value and value engineering, quantity options, whilst encouraging the participation of smaller organisations.
- All members of the procurement team will be identified and involved at an early stage, particularly during the design process, and encouraged to work collaboratively.
- Supply chain partners will be required to demonstrate that compliance, their commitment to integrated working, innovation, sustainability and to a culture of best and transparent.
- To ensure effective and equitable solutions for all firms involved, all contracts will incorporate fair payment protection, such as payment protection of 30 days, to allow vulnerability of sub-contractors, project losses, payment, change provisions and cost sharing, and will include mechanisms to encourage dispute resolution.
- The design of each project before tender will be identified and shared at the outset of the project and appropriate to the project, such as project financing, not to place.
- Data will be clearly identified, accurately captured and allocated to key work areas, project's complexity and ability to manage the risk.
- All partners will agree to informed and open, contractual relationships to ensure no disputes.
- The development of a project will be supported, including subcontractors and the wider industry, will be considered by the client and the wider chain to avoid claims.

COMMITMENT TO PEOPLE

Helping people leads to a more productive and engaged workforce, facilitates recruitment and retention of staff and engages local communities positively in construction projects.

- Local employment projects and local training initiatives will be offered in order to create sustainable communities.
- Local communities will be fully involved and engaged from the outset of all projects.
- Training and development will be offered to all staff including the client, to meet individual, project and company needs.
- Opportunities for apprenticeships and work experience will be offered.
- A policy of equal opportunities will be adopted to encourage a diverse workforce.
- Project specific measures will be introduced to improve safety and awareness to encourage higher standards of performance, including training on real life health and safety.
- Construction sites will be clean, safe and provide good quality facilities, including smoking, separate to the drivers needs of the workforce.
- Sites will be run consistently with increasing reference to local communities.

CLIENT LEADERSHIP

Client leadership is vital to the success of any project and enables the construction industry to perform at its best.

- The client objectives and responsibilities will be clearly identified and independently measured to ensure consistency in leadership for the duration of the project.
- They will be clear, transparent to best practice, published and supported consistently with all organisations involved in the project.
- A clearly expressed and well measured vision and business case for the application of the 2012 Themes will be developed by the client.
- A detailed level with clear financial objectives, programme and delivery of what is meant by success will be developed for the client before the design stage for all projects and they will be shared at the outset with all those involved.
- The client will champion best practice in design, technology, innovation, health and safety, and sustainability, and plan an appropriately formal and specific workforce.
- A clear, collaborative and flexible procurement policy will be developed by the client, together with a clearly expressed industrial relations framework.
- The client will seek to bring the project team from the outset of the project to identify and manage project risk.
- Projects will be regularly communicated before, during and subsequently funded before the 2012 Themes commence.

SUSTAINABILITY

Sustainability lies at the heart of the delivery of the 2012 Themes. A sustainable approach will bring real and lasting environmental, social and economic benefits through responsible and legacy (see also Commitment to People).

- The projects will be designed to conform with the London 2012 concept of a "One Planet City".
- An overarching Sustainable Development Strategy will be developed with relevant stakeholders.
- Each project will develop a specific Sustainability Action Plan which will address environmental, social and economic aspects, and aim to exceed the highest levels within relevant standards and include all aspects of the supply chain.
- Targets, including the business case, will be set within all contracts, and performance will be measured and reported regularly.
- Projects will incorporate best practice measures to improve air, water, noise, vibration, landscape, performance, employment, training and community engagement.
- Development plans will seek to address, create and protect the local environment.
- Projects will actively aim to address the ability and viability of local organisations from the construction period through to the legacy.

DESIGN QUALITY

The design should be creative, imaginative, sustainable and capable of meeting delivery objectives. Quality in design and production offers the best of multiple solutions and means that the Client also meets the needs of all stakeholders, both long-term and short-term, for 2012 and beyond.

- The client will promote a clear total build design commitment.
- Designs will be selected according to value and quality, together with other relevant requirements to the needs and complexity of the project.
- Design requirements will be clear to encourage innovative changes, including not just solutions, and to provide opportunities for managing design and risk.
- The design team will be required to demonstrate and operational requirements of the 2012 Themes and meet both the client's and user's needs for 2012 and beyond, to ensure that relevant risks is reduced by self-correcting building, responsibility and quality, while driving health and safety throughout. Where appropriate it must also facilitate deconstruction and restoration.
- Project teams will actively participate within appropriate procedures to seek to deliver world-class solutions, taking advantage of opportunities for deconstruction, public-private, skills, construction and building contract innovative processes.
- The design will be tested using 3rd party design reviews and other tools for ensuring design quality.
- Virtual collaborative tools and communication technologies will be explored.

HEALTH & SAFETY

Health and safety is integral to the success of any project, from design and construction to subsequent operation and maintenance.

- All designs will address health and safety issues and all projects will have a risk register.
- 2012 operations projects will require to be injury and loss-free.
- Every project will have a strategy to deal with occupational health and provide relevant qualified medical staff on site.
- All health and safety risks, including those relating to non-physical health, will be assessed, managed, before and continuously managed through design.
- Companies will sign up to and implement the Design For Health and Safety Code.
- All construction and site staff will hold Construction Skills Certification Scheme (CSCS) cards or equivalent.

We the undersigned agree to adopt the 2012 Construction Commitments as set out above

Signatures of Chairmen

Tishu Jinn
The BSI Group
Dariusz Hordziej
The BSI Group
K. Lupton
The BSI Group

Signatures of Chief Executives

David Higgins, Chief Executive
Peter Rogers, Director
2012 Task Group

Company
Commitment
Title
Name
Date

In sign up, will the signatories of the signatories of Chairmen and Chief Executives, and also the signatories (date) in the name of all those, see this panel off and refer to the Design Team 2012 Task Group, 19/10/12, 30 West Street, London, WC1E 7HE



STRATEGIC FORUM TARGETS TO 2012

6

principles and their targets through which the construction industry will endeavour to achieve a better industry and achieve best practice.

1. Procurement & Integration

2. Commitment to People

3. Client Leadership

4. Sustainability

5. Design Quality

6. Health & Safety



Construction Commitments

The Construction Commitments bring together the six key areas vital to delivering construction projects on time, safely and to budget. They represent the principles which it is intended will underpin all construction projects in order to achieve a better industry and second current best practice. A separate document with more details of the individual Commitments can be downloaded from the Strategic Forum web site.

The Forum will be working with Constructing Excellence in the Built Environment to promote the use of these Commitments as a framework for all construction projects. We are therefore keen that all companies that support the Commitments and intend to work in accordance with these principles indicate this by signing up on the Strategic Forum web site— www.strategicforum.org.uk

In order to demonstrate the improvements that the industry is making as a result of the adoption of these Commitments, the Strategic Forum has set a number of targets under each of the six areas and details of these are set down in this document. All members of the Strategic Forum will be working to ensure their part of the industry contributes to ensuring these targets are achieved.

The UK Construction Industry

The UK Construction Industry has an annual turnover of more than £900 billion and accounts for almost 10% of the country's GDP. The industry employs some two million people in more than 200,000 different companies. It is five times the size of the aerospace industry and more than three times the size of the automotive industry.

The construction industry is fundamental to the country's economic and social development. Improved transport infrastructure and modern efficient buildings play a major part in lifting the productivity of businesses in the UK. At the same time improvements in social housing, schools and hospitals, as well as the provision of high quality public transport, all depend on the construction industry delivering successful projects.

In a world in which environmental considerations are increasingly seen as of overriding importance, an innovative construction industry holds the key to delivering the solutions that will address the challenge of climate change and the more efficient use of the world's resources.



The Strategic Forum for Construction brings together the main representative bodies in the construction industry. Its vision is for the UK construction industry to achieve maximum value for all clients, and users and stakeholders and to exceed their expectations through the consistent delivery of world-class products and projects.

Member Organisations

- Construction Clients Group
- Construction Confederation
- Construction Industry Council
- Construction Products Association
- NSCC/SEC Group
- TUC

The better information contact:
Strategic Forum for Construction
The Building Centre,
25 Abchurch Lane
London EC4N 3DF
020 7386 7415
020 7386 7425
www.strategicforum.org.uk

1.

Procurement & Integration

A successful procurement policy requires ethical sourcing, enables best value to be achieved and encourages the early involvement of the supply chain. An integrated project team works together to achieve the best possible solution in terms of design, buildability, environmental performance and sustainable development

2010 Target
No specific interim target, but progress to 2012 target will be monitored on an annual basis

2012 Target

Different parts of the industry – clients, consultants, main contractors, specialist contractors* and product manufacturers and suppliers – to be engaged in supply chains on 30% of construction projects and/or 40% of their work to be conducted through integrated project teams

* These figures only apply to those specialist contractors included in the 2010 work. Further specification for target to be established as requirements for necessary integration in the industry by 2012

2.

Commitment to People

Valuing people leads to a more productive and engaged workforce, facilitates recruitment and retention of staff and engages local communities positively in construction projects

2010 Target
Net increase of 250,000 qualified people recruited and trained in the industry compared with 2006

Apprenticeship completions of 10,000 in England, Wales and Scotland

Fully trained, qualified and competent workforce on all projects

2012 Target

Net increase of 300,000 qualified people recruited and trained in the industry compared with 2006

Apprenticeship completions of 10,000 in England, Wales and Scotland

Further target for fully trained and competent workforce to be developed in the light of progress to 2010 target. This is likely to have greater focus on smaller contractors

3.

Client Leadership

Client leadership is vital to the success of any project and enables the construction industry to perform at its best

2010 Target
30% of client activity, by value, embraces the principles of the Client Commitments

2012 Target

60% of client activity, by value, embraces the principles of the Client Commitments

4.

Sustainability

Sustainability lies at the heart of design and construction. A sustainable approach will bring full and lasting environmental, social and economic benefits

2010 Target
No interim targets

2012 Target

By 2012, a 10% reduction in construction, demolition and extension waste to landfill compared to 2005

By 2012, a 15% reduction in carbon emissions from construction processes and associated transport compared to 2006 levels

25% of products used in construction projects to be from schemes recognised for responsible sourcing

Water usage in the manufacturing and construction phases reduced by 20% compared to 2008 usage

All construction projects in excess of £1 million have biodiversity surveys carried out and necessary actions instigated

5.

Design Quality

The design should be creative, imaginative, sustainable and capable of meeting delivery objectives. Quality in design and construction utilising the best of modern methods will ensure that the project meets the needs of all stakeholders, both functionally and architecturally

2010 Target

10% increase year on year from 2007 levels in proportion of projects using ISO in public buildings (parliament, police, fire, courts and other public projects), housing and education projects

10% increase year on year in the number of times the projects above use ISO

80% of projects to achieve at least 10% demand side representation of all workloads

2012 Target

Continued 10% per annum growth from 2010 levels in both of the first two 2010 targets

6.

Health & Safety

Health and safety is integral to the success of any project, from design and construction to subsequent operation and maintenance

2010 Target

Reduce the incidence rate of fatal and/or major injury accidents by 10% year on year from 2008 levels

Reduce the incidence rate of cases in work-related EU health by 10% from 2008 levels

2012 Target

10% reduction year on year in the incidence rate of fatal and major injuries from 2010 levels

50% increase in projects offering a route to occupational health support from 2008 level

30% increase from 2007 level of micro-SMEs and SMEs taking up H&S training and education at an organisational level





HM Government
in association with



STRATEGY FOR SUSTAINABLE CONSTRUCTION

JUNE 2008



HM Government
in association with



Strategy for Sustainable Construction Progress Report

SEPTEMBER 2009



Building
Britain's Future



New drivers

- **Responsible sourcing demand**
- **Local sourcing – strategic support for UK industry**
- **Multiplicity of PQQs – PAS 91**
- **BS 8903:2010 – Procuring sustainably**

- **Need to get off the lowest price = best value myth**

- **Working with whole supply chain**



British Precast Concrete Federation - Concrete Targets 2015 pledge:

Representing _____
Agree our commitment to the Concrete Targets 2015 scheme. Our commitment includes the following targets and aims:

- An expectation of 'ZERO HARM' to all
- 50% reduction in LTI for contractors by 2015 (Baseline 2010)
- 50% reduction in LTI for direct employees by 2015 (Baseline 2010)
- Continuous improvement in accident severity ratio
- Development, implementation or maintenance of a strategy for Health and Safety initiatives and related training, and to manage our Health and Safety needs with a competent staff appropriate to the needs of our organisation
- Implementation or maintenance of structured, inclusive Health and Safety meetings, with effective and appropriate consultation in line with our organisational needs
- Submission of quarterly statistics to British Precast

Signature of company representative _____

Date _____

Our nominated scheme representative is _____

Please return your pledge to:

British Precast Concrete Federation Ltd
60 Charles Street
Leicester
LE1 1FB

Certificates will be sent to all members

**BRITISH
PRECAST**

**BRITISH
PRECAST**

THE PRECAST SECTOR SUSTAINABILITY CHARTER BRITISH PRECAST CONCRETE FEDERATION MEMBER DECLARATION ON SUSTAINABILITY

_____ acknowledges the need to go beyond legislation and take voluntary actions to make its products and operations more sustainable, and commits that from this date it will do this by working towards the adoption of the following principles:

- Develop products that improve the quality and sustainability of the built environment
- Liaise effectively with local communities to foster mutual understanding and respect
- Manage all waste streams effectively and minimise waste disposed to landfill
- Measure, report and improve performance on sustainability issues
- Minimise pollution and emissions associated with production and transportation
- Operate in a responsible manner to protect employees, contractors and visitors or sustainability principles
- Operate in an efficient and financially sustainable manner without compromising legal, quality
- Operate to the highest ethical standards necessary to develop a skilled and competent workforce
- Protect and enhance the natural environment necessary to satisfy customers and consumers
- Recognise that competition encourages the development of more sustainable products and practices
- Use energy more efficiently and reduce carbon footprint
- Use primary materials more efficiently and promote the use of secondary materials
- Use water more efficiently and minimise demand on mains water supplies
- Work constructively with other organisations to deliver sustainable policies and practices

Signatories

Chief Executive, British Precast Concrete Federation

President, British Precast Concrete Federation

British Precast welcomes this declaration and will work in partnership with the signatories and their representatives to support the delivery of these commitments.

If you wish to demonstrate your company's commitment to sustainability by becoming a 'Charter Signatory', please detach this page, enter your company name on the Charter, sign it (Chief Executive or Directors only please) and return it with a covering letter to Martin Clark, Chief Executive.



**BRITISH
PRECAST**

**SUSTAINABILITY
MATTERS**



**ECOBUILD
UPDATE**

ecobuild
Tuesday 02 — Thursday 04 March 2010
Nile Court, London | www.ecobuild.co.uk



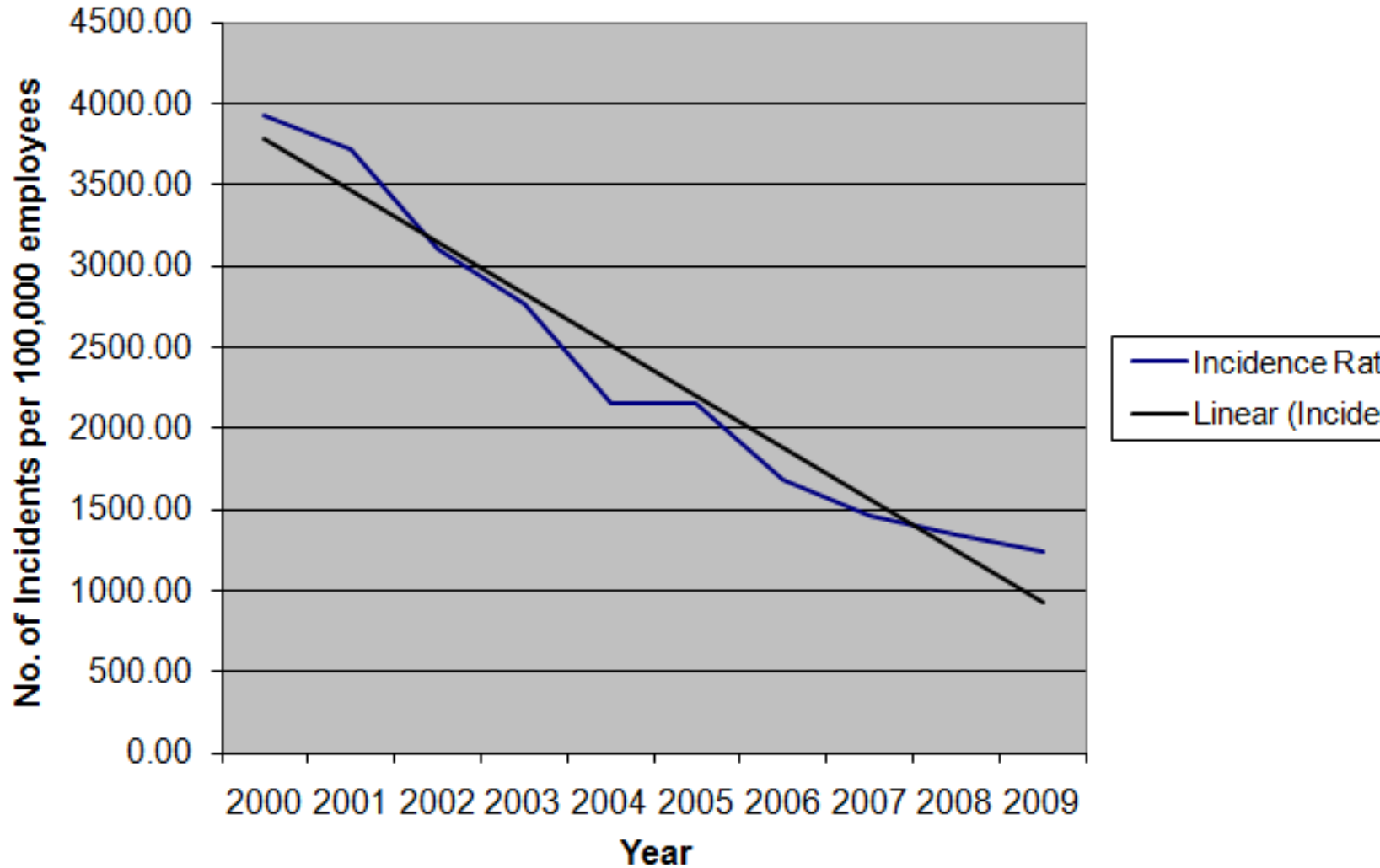
**Concrete Industry
Sustainability Performance
Report**

Based on 2009 production



British Precast – Concrete Targets scheme
progress on safety 2000 - 2009

Incidence Rate







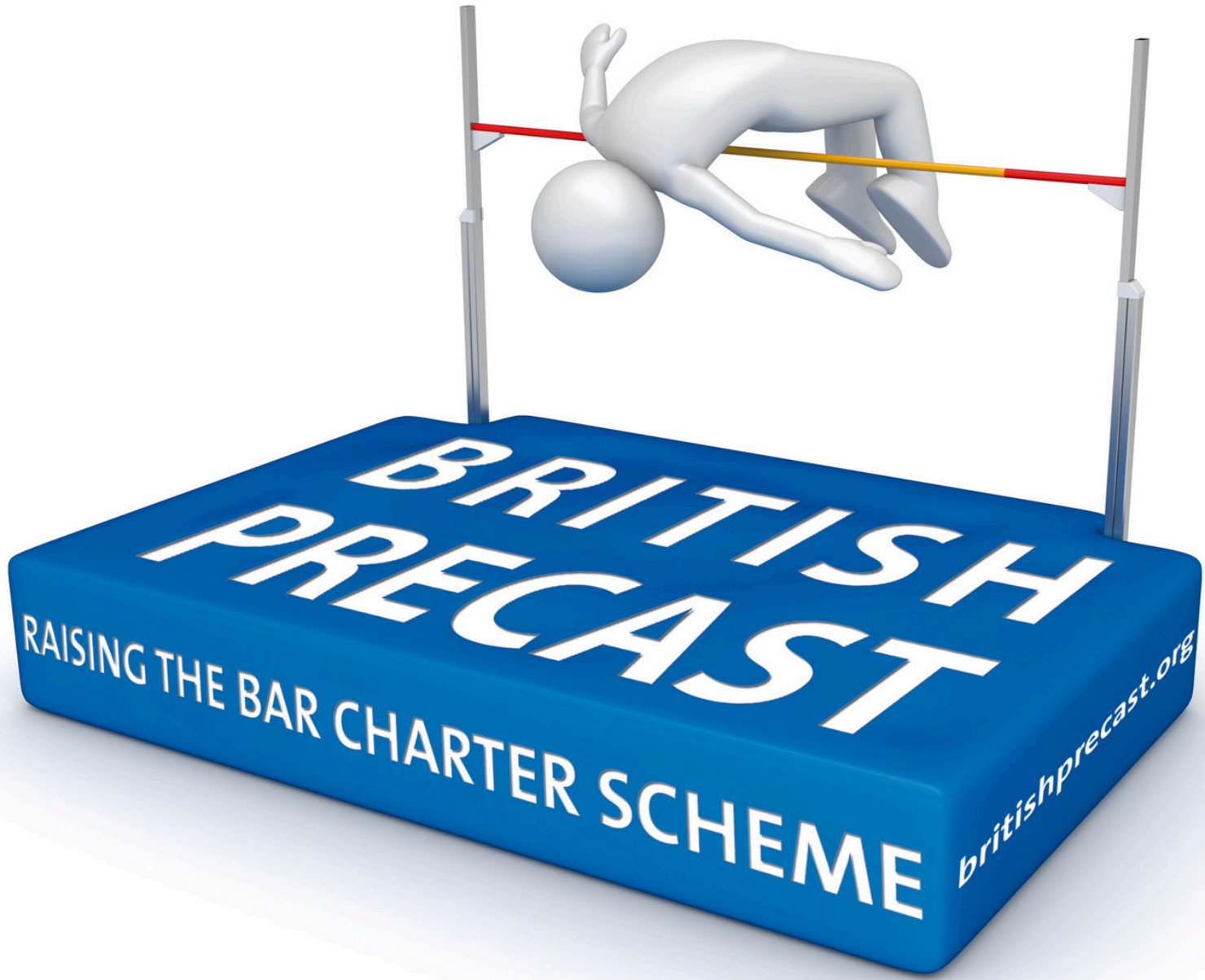












BRITISH
PRECAST

RAISING THE BAR CHARTER SCHEME

britishprecast.org

First Construction Product Trade Association in the World to require all members to sign an audited Charter

RAISING THE BAR The British Precast Charter scheme



Clients, designers and other stakeholders are increasingly demanding higher standards in quality, safety and sustainability for construction products and services. British Precast Concrete Federation, the trade body for the UK concrete products industry, is responding positively to market demand by introducing the British Precast Charter Membership scheme. This requires all full members to sign up to our two main Charter scheme components: the Concrete Targets 2015 Health and Safety scheme and the Sustainability Charter scheme by May 2011.

We are the only construction products body operating such a scheme. More than that, along with the rest of the cement and concrete industry, we report on our safety and sustainability Key Performance Indicators every year and we set published, challenging targets.

Our website www.bpcfcharter.com shows which members have signed up and which have achieved Charter Member status by being audited successfully against the Charter. In addition it provides an up-to-date buyers guide and a listing of other member company achievements including certification to the responsibly sourced materials standard BES 6001. It also points you to our KPI reports and targets.

British Precast fully supports the new British Standard 8903:2010 "Principles and framework for procuring sustainably"

BRITISH PRECAST

Please support the British Precast Charter scheme and support British Industry - look out for our members status through the logos



British Precast
Concrete Federation Ltd
60 Charles Street,
Leicester LE1 1FB
www.britishprecast.org



Will the others follow ?

