

# ERA Convention 2011

*“Growth Again”*

***ROUNDTABLE: SCAFFOLDING***

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## *Scaffolding Regulations & Product development - Rental by area vs. weight and analysis of industry expertise and processes*

### ⑩ Setting the scene

- What is our KEY Role within the access Industry – apart from obviously making money?
  - To offer SAFE and SECURE access products, solutions, structures to the market
- Every year 5,580 people die in the European Union as a consequence of work-related accidents, according to EUROSTAT figures.
- Within the Construction Industry around **1,300** workers are killed each year.
  - This is the equivalent to **13** employees out of every **100,000** — more than twice the average of other sectors.



## *Scaffolding Regulations & Product development*

### *- Rental by area vs. weight and analysis of industry expertise and processes*

#### ⑩ **How is the scaffolding industry regulated?**

- A series of regulations, guidance and code of working practices in different languages cover our industry
  - E.g. BS EN12811 is a European Standard that specifies performance requirements and methods of structural and general design for access and working scaffolds.

#### ⑩ **Who polices the industry to ensure we work to the regulations?**

- For example:
  - UK – HSE & NASC (National Assess & Scaffolding Confederation)
  - USA – OSHA & SIA (Scaffolding Industry Association)
- Are these agencies consistent across Europe?

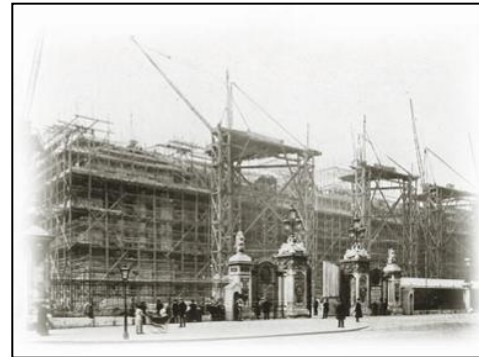
#### ⑩ **Training – is the competency of a scaffolder the same across Europe?**

- For example:
  - Advanced Scaffolder trained in UK – would take on average 5 years to become qualified under the CISRS (Construction Industry Scaffolder Record Scheme) and the NVQ/SVQ
  - Scaffolders in other parts of Europe can be providing scaffolding services after only 1 day of familiarisation
- Where is the consistency in the industry?

So..... how have Access Products evolved over the decades?

## *Access Innovations across the European Markets – last 100 years*

Tubular Scaffolding	1910
Early Scaffold Frame System	1940
MEWP Powered Access	1945
Manual Suspended Access	1945
Modular System Scaffolds	1950
Electric Suspended Access	1960
Aluminum Access Towers	1960
MCWP Mast Climbing Platforms	1980
GRP Access Towers	2000
Podium Platforms	2000
Advanced Guardrail solutions	2000
Push-Around Work Platforms	2005



## *Rental by Area - $m^2$*

### ⑩ Normally rental by $m^2$ is used for indicative estimating

- Caution should be applied when using this model due to:
  - Mix of products and types of equipment used in access solution – if not 100% system or tube and fit scaffolding
  - Variation contracts – entry price vs. exit price
    - Leads to commercial disputes – impact relationship, satisfaction, ability to make money
    - General assumption in this estimating model – exit price 50% greater than entry price



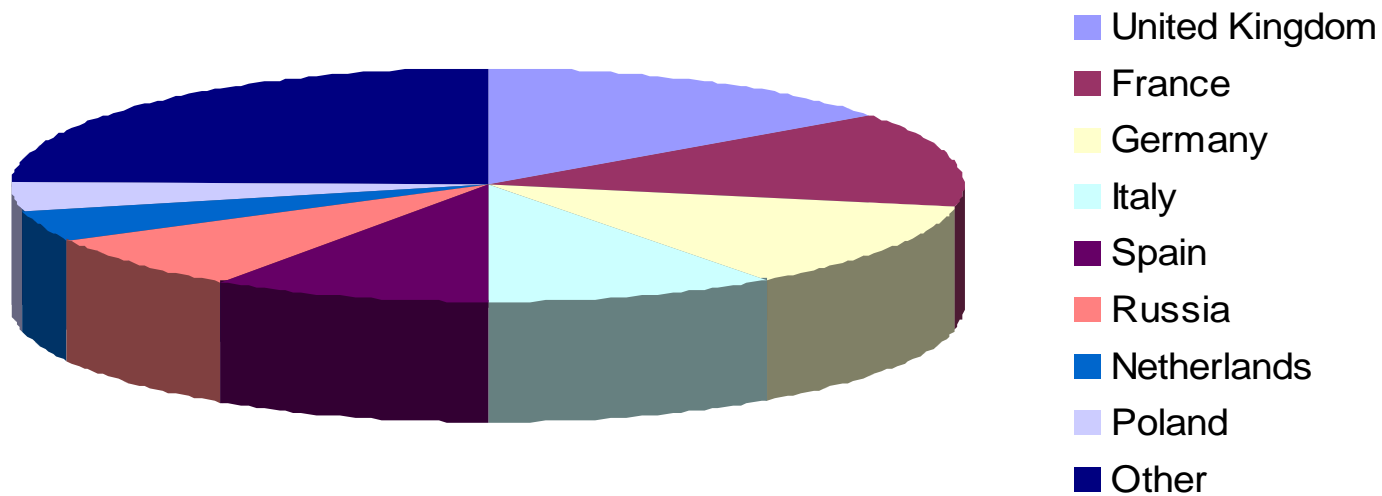
## *Rental by Weight*

⑩ Traditionally *Rental by Weight* is an Asian pricing method which is based 100% on steel product

- European construction methods over recent decades have seen labour costs and failure costs increase, therefore.....
  - This has driven contractors to focus on increasing productivity and efficiency
  - Lighter weight products and mechanical equipment that deliver increased productivity have entered the market – aluminium, system scaffolding, mast climbers etc
    - In effect making pricing by weight almost impossible
- In some instances weight is used when working on the calculation of over-run hire
- Weight is also used as a method of calculating transport quantities and cost



## *European Access Market Estimate 2010 = US\$ 18.4bn*



Source: Global Insight  
Assumption 0.8% of total current construction market value