The Review covers the period 1 July 2005 to 30 June 2006

## CONTENTS

<table>
<thead>
<tr>
<th>Topic</th>
<th>Page No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>5</td>
</tr>
<tr>
<td>Process and Technical</td>
<td>6</td>
</tr>
<tr>
<td>Health and Safety</td>
<td>10</td>
</tr>
<tr>
<td>Commercial and Contractual</td>
<td>14</td>
</tr>
<tr>
<td>Marketing and Membership Services</td>
<td>18</td>
</tr>
<tr>
<td>Registration Scheme</td>
<td>22</td>
</tr>
<tr>
<td>Steel Construction Sustainability Charter</td>
<td>26</td>
</tr>
<tr>
<td>Steel Construction Certification Scheme</td>
<td>30</td>
</tr>
<tr>
<td>Administration</td>
<td>34</td>
</tr>
<tr>
<td>Consumption of Constructional Steelwork</td>
<td>38</td>
</tr>
<tr>
<td>BCSA Group Structure</td>
<td>40</td>
</tr>
<tr>
<td>BCSA Membership</td>
<td>41</td>
</tr>
<tr>
<td>BCSA Centenary</td>
<td>42</td>
</tr>
</tbody>
</table>

1. Arup Campus Phase 2, Blythe Valley Park, Solihull – D A Green & Sons Ltd
2. Ikea, Doncaster – Structural Sections Ltd
THE PRIME MINISTER

I am very pleased to send my warm congratulations to the British Constructional Steelwork Association on the occasion of its 100th Anniversary.

Over the past 100 years your products have become an indispensable part of the built environment in not only the UK, but in virtually every country around the world. The proof is there for us all to see in our daily lives - through new steel-framed hospitals, schools, transport terminals, power stations, bridges, water tanks, factories, offices, residential buildings and sports stadia.

You have a history to be proud of: from Tower Bridge in London to the Sydney Harbour Bridge in Australia; from the Osaka airport terminal in Japan to the new Terminal 5 at Heathrow; from the giant telescope in Hawaii to water tanks in India; from industrial structures in Israel to power stations in China.

BCSA members are those whose technical knowledge and capabilities are regarded as amongst the best in the world. They have enhanced innovation in all aspects of their operations. Their contribution will continue to be vital to achieving what we all seek - a world class built environment, built by a world-class construction industry.

I wish you every success for your next 100 years.

Tony Blair

June 2006
Leading up to this the BCSA’s Centenary Year, the steel construction industry has experienced a lengthy and consistent period of solid growth and we now stand at record levels of output and market share.

Members’ forward order books are healthy and the latest independent report shows that steel’s market share has reached an all time record high. Steel’s share of the multi storey non-residential buildings market has reached 70% for the first time; over the past 25 years steel’s market share had steadily increased from 25% to 70%.

Output this year is forecast to increase to 1,336,000 tonnes, with a further 2% increase forecast over the coming two years. The hosting of the 2012 Olympics should prove to be of great benefit to our industry and further increase demand over the next five years.

The latest independent annual cost comparison study between steel frames and concrete has, once again, proved that steel provides the most advantageous and economical framing solution.

All construction products are now facing raw material and energy price increases. These pressures, combined with higher steel demand levels, lower stocks and higher prices in other regions of the world are resulting in the steel mills introducing higher market prices for structural sections. These price increases are likely to result in the price of fabricated steelwork increasing by c15% over 2006.

Much of BCSA’s work is done through collaboration; for example through the Specialist Engineering Contractors Group (SECG) we co-operate with the other specialist engineering contracting sectors to develop better payment and contractual terms. Through the Metals Forum (an umbrella body covering 500,000 employees) we are working with other trade associations to raise the profile of the metals manufacturing and processing industries and to identify legislation which will impact on member companies.

Whilst continuing co-operation with our colleagues in the European Convention for Constructual Steelwork (ECCS), BCSA has extended dialogue with its international English speaking sister organisations in order to establish a worldwide network of steelwork contracting industry organisations. A meeting of the International Steelwork Contractors Group took place in York in November 2005. Through this network, steel construction best practice and market development initiatives to further help member companies are being determined.

After our first 100 years BCSA is in good shape and looks forward to the future with confidence. We hope that you will enjoy reading this Annual Review.

Donal McCormack
President

Derek Tordoff
Director General
The first five parts of Eurocode 3 and the first two parts of Eurocode 4 were published by BSI in March/April 2005. The second tranche of Eurocode 3 standards which includes standards for the design of bridges, light-gauge members and sheeting, towers and masts, steel chimneys and stainless steel were formally accepted by the European Community earlier this year and published by BSI in June 2006. The final tranche of Eurocode 3 standards has been submitted to member states for formal vote and if accepted will be published by BSI later this year. This tranche includes standards for the design of steel silos, tanks and pipelines, crane supported structures and supplementary rules for high strength steels.

Work on the implementation of the Eurocodes continues to be a high priority for BCSA and a programme of work has been put in place to inform and educate members about these new standards. Design guides like the Blue and Red books will be needed to support the Eurocodes. Furthermore, BCSA together with the Steel Construction Institute and Corus are working on a series of new publications for the Eurocodes which currently include:

1. An introduction to the Eurocodes
2. A concise guide to the Eurocodes
3. A design guide for medium rise buildings
4. Worked examples
5. Section tables
6. Updated Blue book
7. Updated Red book
8. Guide for the design of portal frames
9. Wind guide
10. Updated simple connections book
11. Updated moment connections book

BCSA, together with SCI and Corus, has started work on the National Annexes for Eurocodes 3 and 4. It is anticipated that BSI will issue the NAs for Public Comment towards the end of 2006 and publish them in early 2007.
CE MARKING

The next couple of years will see the introduction of the European harmonised standards for the fabrication of structural steelwork, bolts and welding consumables. These standards will allow steelwork contractors to CE Mark fabricated steelwork. They will also allow bolt manufacturers and suppliers to CE Mark bolts. Following consultation with its members BCSA will be adopting a two part strategy that will include developing a step-by-step procedure for those wishing to CE Mark their products. For those not wishing to go down this route BCSA will develop the principles for meeting the minimum requirements given in the Construction Products Regulations (CPR).

The harmonized standard for fabricated steelwork, EN 1090-1, will be sent to member states for formal vote later this year and if accepted CE Marking may start as early as 2007.

NSSS AND COMMENTARY

Work continues on the development of the 5th edition of the NSSS and its Commentary. The 4th edition has been reviewed and the following changes will be included:

- The standards given in Section 2 have been updated
- Quality of workmanship is now to BS EN 719-3
- The clauses on ultrasonic testing have been revised
- Tolerances for steel fittings have been added
- The requirements on the workmanship of protective coatings have been tightened up.
- A section on LMAC
- The table on holding times has been substantially changed
- An annex on visual inspection had been added

It is anticipated that the 5th edition of the NSSS and its Commentary will be published in January 2007.

LIAISON

BCSA maintains close liaison with other organisations associated with the constructional steelwork industry in the UK, such as Corus, the Steel Construction Institute, and the Association for Consultancy and Engineering. BCSA also has excellent relationships with Government Departments and Agencies including the Highways Agency, the Department of Trade and Industry, the Office of the Deputy Prime Minister and the Building Research Establishment. In Europe BCSA is the UK’s representative body on the European Convention for Constructional Steelwork.

ADVISORY SERVICE

The “external” face of BCSA to the industry is often in the form of technical advice and support. This is available to member companies, clients, specifiers, designers and contractors alike. Response to specific queries is given, where possible, by BCSA staff but where further assistance is necessary alternative sources of information are recommended, such as the complementary advisory services run by Corus and the Steel Construction Institute.
HEALTH AND SAFETY FORUMS
BCSA works with other Trade Associations to establish and address common areas of health and safety concern. The following Forums are actively attended:

- Specialist Engineering Contractors Health and Safety Group (SEC)
- Engineering Construction Industry Association (ECIA)
- Metals Industry Forum Health and Safety Working Group
- Small Business Trade Association Forum (SBTAF)
- Advisory Committee for Roofwork (ACR)
- Royal Society for the Prevention of Accidents (RoSPA)
- Institution of Occupational Safety and Health (IOSH)

WORK AT HEIGHT
The Work at Height Regulations came into force April 2005 and BCSA has worked closely with the Health and Safety Executive; a code of practice for working at height during loading and unloading of steelwork from trailers is in preparation.

HEALTH AND SAFETY PUBLICATIONS
Two new documents have been published:

- Safe Erection in Windy Conditions
- Erection of Steel Bridges

Additional Codes of Practice to be published in 2006 are:

- Erection of Multi Storey Buildings
- The Erectors’ Manual
- Work at Height during Loading and Unloading of Steelwork
A detailed revision of the regulations has taken place and BCSA has been involved through the SEC Group and EOA. Significant changes have been made to the roles and responsibilities of clients, designers and planning supervisors. The Regulations are due to be released in April 2007 and BCSA will be contributing to the draft Approved Code of Practice and Industrial Guidance.

CONSTRUCTION SKILLS CERTIFICATION SCHEME (CSCS)

Working with Metskill to develop NVQ level 2 for steel erectors metal deck installers and studwelders, BCSA members support the CSCS Card scheme and have now identified a number of suitable personnel to become qualified assessors to support the steel industry in achieving full compliance.

HEALTH AND INJURY

The Control of Noise at Work Regulations 2005 was supported by Health and Safety Executive Guidance Notes for Employers and Employees which were issued to the members prior to the Regulation coming into force.

Accident data was collected for 2005 and an analysis of the results was published with conclusions and recommendations given to enable members to target areas for improvement and support the Government and HSE Revitalising Health and Safety Initiative to reduce Industrial Injuries.
CONSTRUCTION ACT REVIEW

The review of Part II of the Housing Grants, Construction and Regeneration Act 1996 (the ‘Construction Act’) began following the Chancellor’s budget announcement in 2004, continued throughout 2005 and is still continuing.

In early 2005, the Department of Trade and Industry (DTI) published a consultation document containing its then views on the reports prepared in 2004 by Sir Michael Latham’s Review Group on changes to the Construction Act.

Many BCSA members and BCSA itself submitted responses to the consultation and BCSA was a major contributor to the Specialist Engineering Contractors’ Group (SEC Group) response. In all, some 356 responses were received by DTI to its consultation.

In the summer, during the consultation period, DTI held a major conference to debate all the issues raised by the consultation. BCSA, as part of the SEC Group, fielded four senior representatives and made an important contribution to this occasion.

Throughout the summer and autumn, BCSA members played a vital role in lobbying their MPs and other representatives in addition to providing crucial evidence of bad payment practices.

DTI’s analysis of the responses to its consultation was not published until January 2006 and a further conference held thereafter to debate its updated proposals.

The review process has now been going on for some two years and looks as though it will take at least a year more to come to fruition. This is slow and frustrating. However, the chance of making real changes to the dreadful payment culture of the construction industry makes it more important to get the right changes than to get them quickly.

Work continues on this overridingly important issue.
DESIGN PROJECT
It was reported last year that a joint project with the Association for Consultancy and Engineering was being set up to produce guidance on design requirements in structural steelwork projects. This project is now in full swing under the supervision of a steering group made up of representatives from all sectors of the industry.

Accurate, timely and comprehensive information, especially design information, is relevant to all parties involved in a construction project and the construction industry needs to do better in order to reduce wastage, continue to be competitive and to deliver improving services to clients. The identification of design requirements early is the easiest way of avoiding late variations, which are always expensive. Steelwork in particular is a manufacturing process: this increases the cost of changes once steel has left the factory.

It is anticipated that the guidance arising from the project will be in three parts:
- an introduction addressed to the client;
- a checklist of steel design activities, setting out all design activities and who is responsible for them and
- descriptions of drawings.

The steering group is also taking measures to ensure that the new guidance fits with the National Structural Steelwork Specification (NSSS); it would in effect provide a detailed explanation of the NSSS’ general design guidance.

There are currently a number of projects in the construction industry dealing with the difficult issue of design information and communication and BCSA is aware that it needs to ensure consistency with all of these, as far as it is necessary to do so. Information exchange is a perennial problem and it is hoped that guidance arising from this project will provide a workable solution.

HEPLINES
BCSA now maintains the following free helplines for the benefit of its members:
- Scottish law helpline (open to all BCSA members), provided by Scottish solicitors MacRoberts;
- QS helpline, provided by Cyril Sweett Ltd;
- Industrial relations helpline, provided by the Engineering Construction Industry Association and
- General business support helpline, including employment law, provided by Croners.

EMPLOYMENT LAW
BCSA is now focusing more on employment law matters for its members and Croners’ helpline is an important part of this. Croners also provides a regular employment law bulletin, ‘Solutions’, which is circulated to members.

Additionally, solicitors Hill Dickinson gave well received seminars on employment law to several BCSA regions in 2005.

OLYMPIC GAMES
The next big challenge for steelwork is anticipated to be the Olympic Games in 2012. BCSA believes that it is vital for best practice to be used in the procurement for all the infrastructure for the Games. As part of SEC Group, it has been involved in the developing an Olympic Charter for procurement, insisting on the use of project bank accounts for all projects for the Games and for a ban on the holding of retentions.
Marketing the capabilities and achievements of the steelwork contracting industry and also the activities of the Association are vital and growing areas of activity.

**MEMBERSHIP SERVICES**

Members have access to a professional Head Office advisory service on a wide range of topics. In addition, the Regional Secretaries organise a programme of regional meetings and events in order that members can make personal contacts and share experiences.

A comprehensive briefing and information package is issued to members electronically on an almost daily basis to keep them fully informed on current matters.

**INDUSTRY STATISTICS**

The Association regularly collects authoritative statistics from member companies to establish price and delivery trends throughout the industry. Statistics are also collected for Cancellation and Daywork Charges, and on State of Trade.

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NATIONAL CONFERENCE
A conference and exhibition, “Steel Construction – The Way Ahead”, was held at The Brewery, London on 15 November 2005. A new publication entitled “Steel Details” was published at the Conference, illustrating steelwork detailing as design decisions in context, not solely as calculation methodologies.

LIAISON WITH STUDENTS
The 2006 Student packs, which are produced by Corus Construction & Industrial and BCSA, were distributed to civil/structural/architecture undergraduates. Each pack contained six CDs, viz Making steel, Fabrication, Construction, “Steel Details”, “Steel Buildings” and “Steel Bridges”.

STRUCTURAL STEEL DESIGN AWARDS
The Structural Steel Design Awards Scheme is sponsored jointly by BCSA, Corus and the Steel Construction Institute, and is administered by the Association. The objective of the Scheme is to recognise and celebrate the excellence of the United Kingdom in the field of steel construction, particularly demonstrating its potential in terms of efficiency, cost effectiveness, aesthetics and innovation.

Mr Roger Bayliss, Construction Director of BAA, kindly presented the 2006 Awards at a lunch ceremony held on 23 June at The Savoy Hotel.

MACMILLAN CANCER RELIEF
To date almost £80,000 has been raised for Macmillan Cancer Relief at various events.

RECRUITMENT
While approximately 75% of the output of the UK constructional steelwork is produced by BCSA members, there are a number of non-member companies not yet enjoying the benefits of membership; it is hoped to recruit these into membership during the coming year.
THE REGISTER OF QUALIFIED STEELWORK CONTRACTORS
The Register of Qualified Steelwork Contractors is more than just a list of companies as each applicant company must qualify by being audited by specialist auditors who check the company's financial resources, technical resources and track record. The result is two criteria:

- categorisation of the company in terms of the work it can execute technically
- classification of the company in terms of the maximum size of contract it should handle

**BUILDINGS SCHEME**

Applicants may be registered in one or more categories to undertake the fabrication and the responsibility for any design and erection of:

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**NOTES**

(1) Contracts which are primarily steelwork but which may include associated works. The steelwork contract value for which a company is pre-qualified under the Scheme is intended to give guidance on the size of steelwork contract that can be undertaken; where a project lasts longer than a year, the value is the proportion of the steelwork contract to be undertaken within a 12 month period.

Where an asterisk (*) appears against any company's classification number, this indicates that the assets required for this classification level are those of the parent company.
1

Usk Bridge and Cycle Path – Rowcord Engineering

Pont Dewi Sant Bridge, Sirhowy Enterprise Way, Blackwood – Fairfield-Mabey Ltd
### BRIDGEWORKS

A special section of the Register has been developed to cover bridgeworks. The Highways Agency now includes in its tender documentation a requirement that only firms listed on the Register of Qualified Steelwork Contractors for the type and value of work to be undertaken will be employed for the fabrication and erection of bridgeworks.

In order to be registered in the Bridgework Category, a company must have a minimum turnover in steelwork for bridges of £1 million in the most recent year or alternatively per annum if averaged over the last three years.

The company must present references for completed supply and erect contracts that include at least six bridgework contracts undertaken over the last five years, of which two must each exceed £100,000 contract value completed within the last three years.

The company’s track record and the company’s systems, existing facilities and employed personnel will be used to establish its capability.

---

### BRIDGEWORKS SCHEME

Based on evidence from the company’s resources and portfolio of experience, the Subcategories that can be awarded are as follows:

- **FG**: Footbridges and Sign Gantries
- **PT**: Plate girders (>900mm deep), trusswork (>20m long)
- **BA**: Stiffened complex platework in decks, box girders, arch boxes
- **CM**: Cable-stayed bridges, suspension bridges, other major structures (>100m)
- **MB**: Moving bridges
- **RF**: Bridge refurbishment
- **X**: Unclassified

Applicants may be registered in one or more sub-category.

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<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>Above £6,000,000</td>
</tr>
<tr>
<td>Interserve Project Services Ltd</td>
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<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>Up to £400,000*</td>
</tr>
<tr>
<td>Meldan Fabrications Ltd</td>
<td>01652 652075</td>
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<td>●</td>
<td>●</td>
<td>●</td>
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<tr>
<td>‘N’ Class Fabrication Ltd</td>
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<td>●</td>
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<td>●</td>
<td>●</td>
<td>●</td>
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</tr>
<tr>
<td>Normanby Wefco Ltd</td>
<td>01427 611000</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>Up to £800,000</td>
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<tr>
<td>Nusteel Structures Ltd</td>
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<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>Up to £2,000,000*</td>
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<tr>
<td>P C Richardson &amp; Co (Middlesbrough) Ltd</td>
<td>01946 727119</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
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<td>Up to £6,000,000</td>
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<tr>
<td>Rowecord Engineering Ltd</td>
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<td>●</td>
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<td>●</td>
<td>●</td>
<td>●</td>
<td>Above £6,000,000</td>
</tr>
<tr>
<td>Taylor &amp; Sons Ltd</td>
<td>029 2034 4556</td>
<td>●</td>
<td>●</td>
<td>●</td>
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<td>●</td>
<td>●</td>
<td>●</td>
<td>Up to £800,000</td>
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<td>Watson Steel Structures Ltd</td>
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<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>Above £6,000,000*</td>
</tr>
</tbody>
</table>

### NOTES

(1) Contracts which are primarily steelwork but which may include associated works. The steelwork contract value for which a company is pre-qualified under the Scheme is intended to give guidance on the size of steelwork contract that can be undertaken, where a project lasts longer than a year, the value is the proportion of the steelwork contract to be undertaken within a 12 month period.

Where an asterisk (*) appears against any company’s classification number, this indicates that the assets required for this classification level are those of the parent company.
Sustainability is rapidly moving up the agenda as a procurement issue. Increasingly construction clients are looking for sustainable forms of construction and for companies which operate in a “sustainable” manner. Steel is being promoted to clients, specifiers and designers as a more sustainable form of construction than concrete, eg it is recyclable, fabricated offsite, safer to erect, etc. In order to complement this, there was a need to establish a mechanism for clients, specifiers and designers to be able to determine what a “sustainable steel construction company” is and how to identify such companies. This has resulted in the Steel Construction Sustainability Charter which was launched at the Steel Construction Conference and Exhibition on 15 November 2005.

This is an initiative to promote both steel construction and those companies which sign up to the Charter. The British Land Company PLC, one of the UK’s largest construction developers supports this initiative.
The objective of the Steel Construction Sustainability Charter is:

To develop steel as a sustainable form of construction in terms of economic viability, social progress and environmental responsibility.

The BCSA requires that Sustainability Charter Members shall make a formal declaration to:

- Operate their businesses in efficient and financially sustainable ways in order to undertake contracts that satisfy clients and add value for stakeholders.
- Work to optimise the impact of manufacturing and construction activities on the eco-efficiency of steel construction through its life cycle.
- Work towards increasing the efficiency of use of resources and energy in steel construction by promoting the recovery, reuse and recycling of steel.
- Foster the health and safety of employees and others in the steel construction industry, and operate generally in a healthy, safe and environmentally sound manner.
- Demonstrate its social responsibility by promoting values and initiatives that show respect for people and communities associated with steel construction.
- Conduct business with high ethical standards in dealings with employees, clients, suppliers and the community.
- Engage stakeholders and independent third parties in constructive dialogue to help implement sustainable development.
- Build on their knowledge of sustainability and willingly share this with others, by being open and active in communications and by helping steel and construction companies and other organisations in the supply chain to implement sustainable policies.
CERTIFICATION SERVICES
All but one of the re-assessments and surveillances visits programmed for 2005 were completed.

The work-load for 2006 includes the re-assessment of 18 separate system certifications. At the same time, SCCS is aware of two new companies seeking QMS certification. In addition, one is preparing their EMS for assessment and four organisations have advised us of their intention to apply for H&S certification.

UKAS ACCREDITATION
UKAS conducted formal surveillance audits of both the QMS and EMS accredited certification systems during January 2006.

Improvement Action statements relevant to minor findings resulting from both audits have been completed and submitted with all the associated evidence.

QUALITY MANAGEMENT (QMS)
All the certification re-assessments due in 2005 were effectively completed successfully. 15 separate QMS certifications require full re-assessments during 2006.

This ‘peak’ in re-assessment activity is due mainly to the time taken by the majority of the certified steelwork contractors to complete the transition from ISO 9001:1994 to ISO 9001:2000, plus the need to comply with the IAF GD 62 requirements for re-certification assessment every three years.

SCCS expects to complete QMS certification assessments for at least two new contracting organisations during 2006.
ENVIRONMENTAL MANAGEMENT (EMS)
SCCS will be conducting formal re-assessments for two of the existing EMS certifications during 2006.

There continues to be little evidence of interest in the supply of additional EMS certification services within the industry. It is however evident that all current systems development resources are being directed towards Health & Safety Management. SCCS expects steelwork contracting organisations to review the requirement for an effective EMS as/if they seek to achieve sustainability charter status.

HEALTH & SAFETY (H&S)
Two new H&S certificates were issued in October 2005.

A Stage 1 assessment has been completed for one additional structural steelwork contractor and it is anticipated that Stage 2 will be completed during mid 2006.

Four other organisations have reported their preparations for certification assessment during mid 2006.

Surveillance visits continue with the existing H&S certified organisations and that workload will increase with the number of authorised certifications.

INTEGRATED MANAGEMENT SYSTEMS (IMS)
Although the Certification Board agreed to give priority to the development of a Factory Production Control (FPC) certification service, it is intended that progress will be made on development of the IMS service during 2006.

The initial SCCS output will be a Guidance Note designed to assist organisations to recognise and benefit from the integration of common elements of quality and/or environmental and/or health & safety management systems.

CE MARKING
The formal quality management system requirements of EN1090-1:2004 have yet to be confirmed. SCCS therefore awaits publication of the final details before announcing the Scheme’s requirements for certification of Factory Production Control (FPC) systems implemented by steelwork contracting organisations. It is expected that EN 1090-1 will be published during late 2006 and compliance will become a requirement during mid 2007. In the meantime SCCS Certification Board has formed a sub-committee to review the requirements and to prepare systems for a new certification service.
The Council meets regularly during the year to guide the activities of the Association and to monitor the work of the main committees, viz Commercial and Contracts, Process and Technical, Health and Safety, and Marketing and Membership Services.

REGIONS
The Association has four geographic Regions – Scottish, Northern Ireland, Northern, Midland and Southern – which, together with the Bridgework Conference have their own Regional Secretaries and programme of activities administered by their own Executive Committees, from which representatives are elected to serve on the Association’s Council and National Committees. A wide range of local, regional and national meetings are held on a regular basis throughout the year to discuss specific issues.
EUROPEAN CONVENTION FOR CONSTRUCTIONAL STEELWORK (ECCS)

The UK was represented at the many meeting of the European Convention for Constructional Steelwork during the year, including the Annual Meetings held in Nice, France in September 2005.

WEEKEND CONFERENCE

290 members and guests attended the Association’s Weekend Conference that was held at the Hilton Hotel, Templepatrick, Belfast on 7 and 8 October 2005.

CENTENARY DINNER

450 members and guests attended the Association’s Centenary Dinner held at The Savoy Hotel, London on 7 March 2006. The Principal Guest was The Rt Hon Alun Michael MP, Minister for Industry, the Regions and Construction, Department of Trade and Industry. The Association’s President, Mr Donal McCormack, proposed the toast to the Guests.

A prize draw took place at the Dinner in aid of Macmillan Cancer Relief, the Association’s chosen charity, which raised just over £4,000, bringing the total raised to date to almost £80,000.

CENTENARY BANQUET

460 members attended the Association’s Centenary Banquet which was held at Blenheim Palace on Friday 16 June 2006.

ANNUAL GENERAL MEETING

The Annual General Meeting of the Association was held on Thursday 13 July 2006 at The Savoy Hotel, London.
### CONSUMPTION

#### STEEL VS CONCRETE - COST COMPARISON

<table>
<thead>
<tr>
<th>YEAR</th>
<th>Overall</th>
<th>Steel</th>
<th>Concrete</th>
</tr>
</thead>
<tbody>
<tr>
<td>2003 Q4</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2004 Q3</td>
<td></td>
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<td></td>
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<tr>
<td>2005 Q2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overall</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### STEEL’S GROWING MARKET SHARE

**Figures supplied by Corus Group plc and BCSA**

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**UK CONSUMPTION OF CONSTRUCTIONAL STEELWORK**

| YEAR | 79 | 80 | 81 | 82 | 83 | 84 | 85 | 86 | 87 | 88 | 89 | 90 | 91 | 92 | 93 | 94 | 95 | 96 | 97 | 98 | 99 | 00 | 01 | 02 | 03 | 04 | 05 | 06 | 07 | 08 |
|------|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|
| SECTOR | Kt | Kt | Kt | Kt | Kt | Kt | Kt | Kt | Kt | Kt | Kt | Kt | Kt | Kt | Kt | Kt | Kt | Kt | Kt | Kt | Kt | Kt | Kt | Kt | Kt | Kt | Kt | Kt |
| Industrial | 689 | 584 | 440 | 368 | 459 | 563 | 495 | 580 | 658 | 745 | 820 | 925 | 831 | 916 | 1009 | 1078 | 1095 | 1201 | 1252 | 1269 | 1288 | 1244 | 1283 | 1343 | 1305 | 1357 | 1358 |
| Offices (Private) | | | | | | | | | | | 164 | 128 | 96 | 86 | 82 | 89 | 99 | 109 | 127 | 145 | 164 | 186 | 170 | 148 | 133 | 149 | 157 | 165 |
| Offices (Public) | | | | | | | | | | | 18 | 17 | 15 | 15 | 14 | 16 | 17 | 17 | 17 | 18 | 18 | 18 | 18 | 18 | 18 | 18 | 18 |
| Offices Total | | | | | | | | | | | 182 | 142 | 111 | 102 | 100 | 114 | 111 | 119 | 131 | 156 | 174 | 196 | 186 | 166 | 151 | 156 | 162 | 168 | 175 |
| Retail | | | | | | | | | | | 77 | 81 | 71 | 70 | 88 | 82 | 92 | 95 | 102 | 106 | 99 | 101 | 115 | 125 | 129 | 123 | 123 | 124 | 126 |
| Leisure | | | | | | | | | | | 63 | 51 | 44 | 41 | 52 | 54 | 65 | 92 | 103 | 106 | 103 | 90 | 91 | 83 | 87 | 82 | 87 | 90 |
| Health | | | | | | | | | | | 11 | 10 | 11 | 14 | 14 | 11 | 12 | 13 | 14 | 16 | 16 | 18 | 20 | 28 | 28 | 27 | 29 | 31 |
| Education | | | | | | | | | | | 9 | 9 | 10 | 10 | 13 | 16 | 19 | 18 | 17 | 19 | 22 | 27 | 34 | 41 | 47 | 54 | 56 | 58 | 63 |
| Generation | 19 | 32 | 33 | 37 | 37 | 36 | 31 | 27 | 27 | 37 | 37 | 36 | 31 | 27 | 27 | 27 | 27 | 27 | 27 | 37 | 37 | 36 | 31 | 27 | 27 | 27 | 27 | 27 | 27 |
| Towers | 5 | 4 | 5 | 6 | 6 | 4 | 3 | 3 | 3 | 2 | 2 | 3 | 4 | 4 | 3 | 3 | 5 | 4 | 5 | 4 | 4 | 4 | 4 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 |
| Power Total | 22 | 26 | 24 | 24 | 19 | 19 | 13 | 13 | 13 | 14 | 14 | 29 | 30 | 27 | 25 | 21 | 19 | 29 | 19 | 24 | 22 | 29 | 21 | 19 | 20 | 20 | 22 | 24 | 24 | 26 | 29 | 32 |
| Bridges | 17 | 12 | 16 | 14 | 21 | 23 | 25 | 47 | 32 | 57 | 47 | 47 | 49 | 51 | 59 | 46 | 38 | 34 | 28 | 27 | 30 | 31 | 36 | 42 | 28 | 28 | 32 | 33 | 34 |
| Other Infrastructure | | | | | | | | | | | 8 | 10 | 14 | 20 | 24 | 25 | 35 | 26 | 28 | 28 | 44 | 44 | 41 | 29 | 29 | 26 | 26 |
| Domestic | 6 | 4 | 2 | 3 | 3 | 2 | 2 | 3 | 5 | 5 | 6 | 6 | 6 | 5 | 6 | 5 | 6 | 5 | 6 | 8 | 10 | 12 | 15 | 20 | 30 | 50 | 53 | 53 | 52 | 50 |
| Agriculture | 32 | 88 | 77 | 82 | 90 | 93 | 105 | 65 | 70 | 64 | 61 | 60 | 49 | 47 | 52 | 54 | 52 | 47 | 46 | 45 | 43 | 35 | 41 | 45 | 50 | 51 | 53 | 54 | 56 |
| Other | | | | | | | | | | | 29 | 24 | 16 | 18 | 19 | 23 | 28 | 33 | 33 | 37 | 36 | 35 | 37 | 38 | 39 | 40 | 41 | 42 |
| Fabricated Exports | 100 | 65 | 96 | 115 | 93 | 90 | 80 | 59 | 52 | 46 | 49 | 54 | 57 | 65 | 66 | 68 | 87 | 77 | 72 | 78 | 66 | 68 | 88 | 85 | 95 | 95 | 91 | 85 | 80 | 80 |
| TOTAL UK PRODUCTION | 1051 | 938 | 831 | 829 | 780 | 920 | 1054 | 976 | 1148 | 1286 | 1188 | 931 | 855 | 888 | 1099 | 1078 | 1095 | 1201 | 1252 | 1269 | 1270 | 1288 | 1243 | 1255 | 1348 | 1334 | 1338 | 1343 | 1363 |
| Year-on-Year % Change | 0 | 3.2 | 11.4 | 0.2 | 4.7 | 16.5 | 14.6 | 14.7 | 17.6 | 12.0 | 11.0 | 16.7 | 21.7 | 8.2 | 3.9 | 13.6 | 6.8 | 1.6 | 10.5 | 3.5 | 1.4 | 0.1 | 13.4 | 1.5 | 1.5 | 1.5 | 1.5 | 1.5 | 1.5 | 1.5 |

**NOTES**

1. Commercial and Public tonnages were not split until 1990.
2. Commercial tonnage was also subdivided into new categories - Leisure and Other - from 1990.
3. Other Infrastructure tonnage was not identified separately before 1994.
GROUP STRUCTURE

As at 30 June 2006

BCSA LIMITED
MEMBERS OF THE COUNCIL

Office Bearers
D McCormack President
R B Barrett Deputy President
T G Goldberg Immediate Past President

Midland and Southern Region
R N Harrison A G Hernon

Northern Region
A J Holmes G J Badge

Scottish Region
J H Sanderson J G Kirkpatrick

Northern Ireland Region
E Fisher D Watson

Bridgework Conference
P Miller B Rogan

Co-opted Council Member
Dr J M Roberts

Vice Presidents
P R Samworth S G Fareham

Committee Chairmen
S Boyd Commercial and Contracts
A H Pillinger Process and Technical
E S Price Health and Safety
G H Taylor Marketing and Membership Services

Director General
Dr D Tordoff

Secretary
Mrs M C Rich

BCSA REGIONAL SECRETARIES

Midland and Southern Region
Ms L Carlisle
74 Rowan Way, Balderton
Newark NG24 3BJ
Tel: 01636 681321 Fax: 01636 681321

Scottish Region
S Henderson
34 Torwood Brae, Earnock
Hamilton ML3 9XB
Tel: 01698 422429 Fax: 01698 422804

Northern Region
M Hamilton
30 Derby Road, Ansdell
Lytham St Annes FY8 4BZ
Tel: 01253 736857 Fax: 0870 1244972

Northern Ireland Region
T Wylie
27 Glenariff Park, Bangor
Co Down BT20 4UY
Tel: 028 9146 7454 Fax: 028 9127 0508

THE BRITISH CONSTRUCTIONAL STEELWORK ASSOCIATION LIMITED

Directors
D McCormack President
R B Barrett Deputy President
T G Goldberg Immediate Past President
Mrs M C Rich Company Secretary

Head Office

Director General
D Tordoff BSc PhD CEng FICE FRSA FInstD FCMI MHT

Deputy Director General
Miss G M Mitchell MBE

Director, Legal & Contractual Affairs
Mrs M C Rich Barrister MSc FCIArb

Director of Engineering
D B Moore CEng BTECH PhD MInstE

Health & Safety Manager
P Walker CFIOSH

Accounts Manager
D A Thornicroft BA

Technical Consultant
R J Pope MA MSc DPHE CEng FInstE FIStructE FCIARB

REGISTER OF QUALIFIED STEELWORK CONTRACTORS SCHEME

Auditors
J E Evans BSc(Eng) Hons ACII DIC CEng FICE
FMehfi FAcE FRSA
M T Hamilton MRICS
R J Pope MA MSc DPHE CEng FInstE FIStructE
FCIArb

STEEL CONSTRUCTION CERTIFICATION SCHEME LIMITED

Directors
D McCormack R B Barrett
T G Goldberg Mrs M C Rich (Company Secretary)

Certification Board
Chairman of the Certification Board
D A Woodward

Head Office

Scheme Manager
P R Mould MQA Registered Lead Auditor

Scheme Assessors
Dr R Cheesman PhD FIDIA
MRSC ChChem Registered Lead Auditor
S Mills CEI BA Registered
Lead Auditor (IRCA & RAB)

D Taylor CEng MIMechE Principal Auditor IEMA

BCSA ANNUAL REVIEW 2005 - 2006
The historical development of steelwork in construction is a subject which has never been precisely recorded because it came about as part of the general development in building techniques dating back to before the industrial revolution. Cast iron beams and columns are recorded as having been incorporated in the building of a five-storey mill at Shrewsbury as far back as 1797 and, by the middle of the nineteenth century, developments in the use of wrought iron had made it acceptable to Brunel and Stevenson in the construction of many famous railway bridges still in use today. The demand for ironwork in buildings then grew very quickly and, under its impetus, technical developments soon made supplies of the new Bessemer and Open Hearth steels available. The first rolled sections in this new completely metallic material to be used in a steel-framed building in the British Isles were in a furniture emporium in County Durham, built in 1900.

BCSA first began in Manchester in 1906 when five of the larger fabricators in the area put their heads together to form the Steelwork Society. Similar groups formed in the following years in other regions of the country, such as:

- The London Constructonal Engineers Association
- The Midland Structural Association
- The Scottish Structural Steel Association
- The Northern Ireland Steelwork Association
- The Bridge and Constructional Ironwork Association
- The Structural Export Association

Ultimately these were all amalgamated into The British Constructional Steelwork Association in 1936.

BCSA is the national organisation for the steel construction industry; its Member companies undertake the design, fabrication and erection of steelwork for all forms of construction in building and civil engineering; its Associate Members are those principal companies involved in the purchase, design or supply of components, materials, services, etc, related to the Industry. The principal objectives of the Association are to promote the use of structural steelwork, to assist specifiers and clients, to ensure that the capabilities and activities of the industry are widely understood and to provide members with professional services in technical, commercial, contractual, health & safety and certification matters. The services provided by BCSA work both for the overall benefit of the industry and the direct benefit of individual companies.

The turnover of the industry is approximately £5,000 million pa with 15,000 direct employees and a further 50,000 indirect employees. The UK steel construction industry is the world-leader and steel is the leading construction material in the United Kingdom. Steel’s market share of non-domestic multi-storey building construction (buildings of two or more storeys) has increased from 33% in 1980 to an all time record 70% today. Steel maintains a 98% share of single storey non-domestic construction.

In his address, Donal McCormack, BCSA President said: “Over the past 100 years our industry has successfully transformed the built environment in not only the UK, but virtually every country around the world.” Mr McCormack stressed it had been a “century of success”, especially the last decade when steel has experienced a lengthy period of growth and record levels of output and market share. He thanked the BCSA member companies “without whose continual support and participation there would be no Association”.

In proposing the toast to the Association, BCSA Vice President, Joe Locke MBE said: “We have a history and an industry to be proud of – the famous names of the past – Smeaton, Rennie, Brunel, Telford, Stephenson, Arrol – are our predecessors. We have built on the legacy of their structures, such as Ironbridge, and continued the industry onwards with structures such as Humber Bridge, the tower blocks at Canary Wharf and the outstanding new Terminal 5 at Heathrow. The Association has been and continues to be the binding force for the industry; through BCSA we have been able to share experiences, our concerns and develop new initiatives to take the industry onwards.”

BCSA Centenary Banquet held at Blenheim Palace on 16th June 2006

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