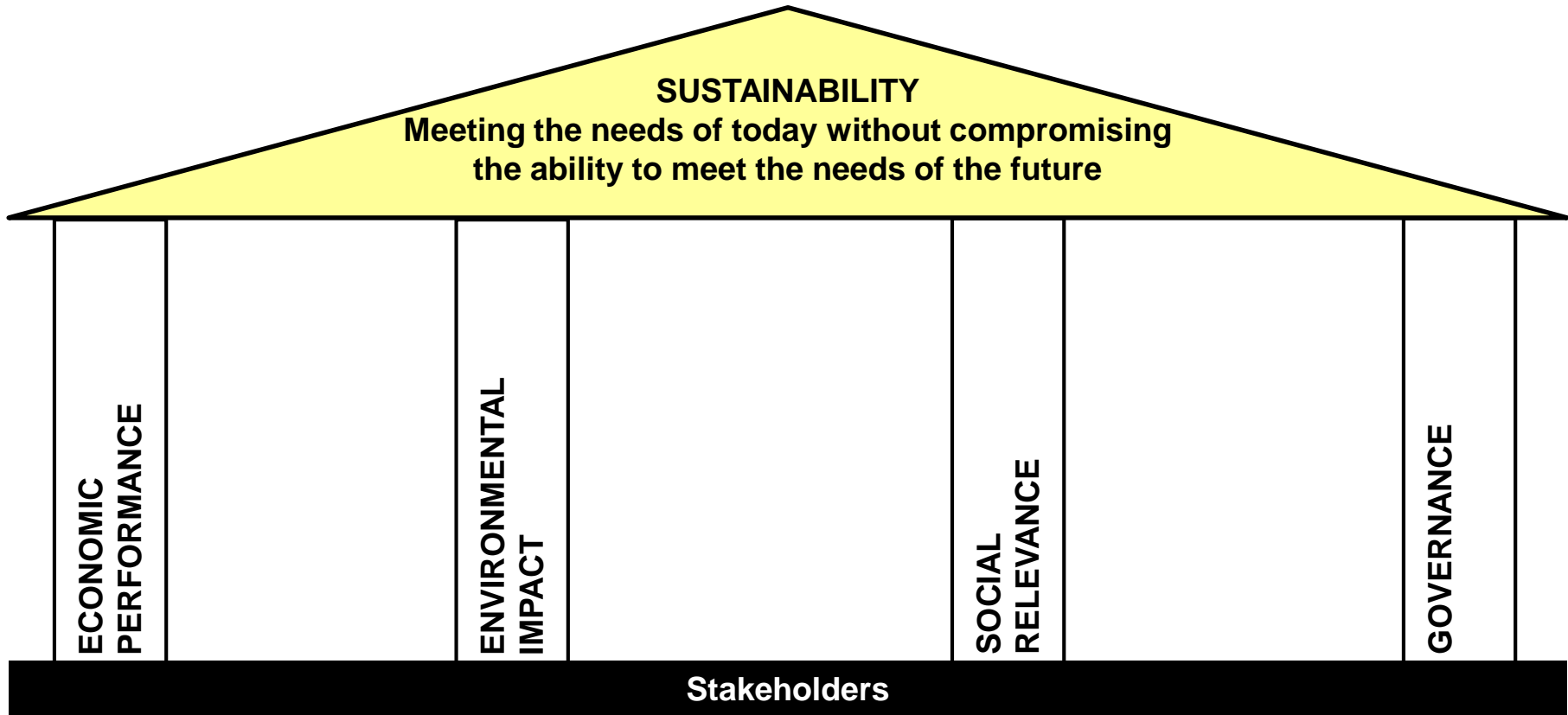


Sustaining our Industry Together

Nick Selley
IPAF President
July 2018

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- SUSTAINABILITY – A DEFINITION



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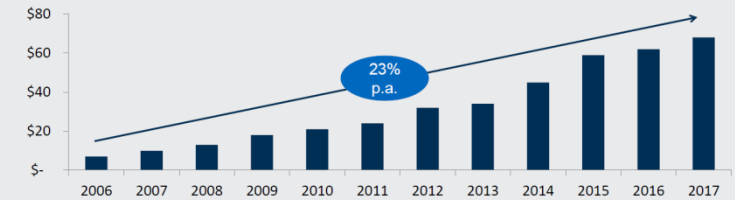
SUSTAINABILITY – WHY DOES IT MATTER?

- Investors/Stakeholders increasingly focus on sustainable practices
- There is evidence that better sustainability performance correlates with better financial performance
 - Especially when performance is achieved in the most important factors
- Stakeholders now expect it – we don't have a choice!
 - United Airlines
 - BP
 - VW



Sustainability – Investors Are Embracing the Idea

Sustainability-Focused Investments
Assets Under Management (\$Trillion)



Source: Global Sustainable Investment Alliance

ISS & Corporate Issues | [Contact us](#)

ISS

ABOUT SOLUTIONS POLICY GATEWAY GOVERNANCE EXCHANGE COMPLIANCE CONTACT LOGINS

ISS Announces Launch of Environmental & Social QualityScore Corporate Profiling Solution

Environmental, Social, and Governance QualityScores to be Reflected in ISS Proxy Research Reports

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ROCKVILLE, M.D. (February 5, 2018) – Institutional Shareholder Services Inc. (ISS), a leading provider of governance and responsible investment solutions to the global financial community, today announced the launch of **Environmental & Social QualityScore**, a new component of ISS' industry leading corporate profiling and scoring solution for institutional investors.

ES&S QualityScore represents a data driven approach to measuring the quality of corporate disclosures on environmental and social issues, including sustainability governance, and to identify key disclosure omissions. Expectations regarding disclosure practices are defined by industry groups, based on the specific environmental and social risks identified in industry and multi-stakeholder initiatives and reflected in authoritative standards and recommendations from groups such as the Global Reporting Initiative, the Sustainability Accounting Standards Board and the Task Force on Climate-related Financial Disclosures.

Today's launch covers an initial set of 1,500 companies across industries viewed as being most exposed to E&S risks, including: Energy, Materials, Capital Goods, Transportation, Automobiles & Components, and Consumer Durables & Apparel. An additional 3,500 companies spanning 18 industries will be added later in 2018, bringing the total coverage universe to over 5,000 companies globally.

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	EMPLOYEES	CUSTOMERS	COMMUNITY	INVESTORS
KEY ISSUES	<ul style="list-style-type: none"> • Safety • Diversity • Career development • Training • Compensation & benefits 	<ul style="list-style-type: none"> • Fleet availability • Delivery & Collection • Billing accuracy • Pricing • Ease to do business 	<ul style="list-style-type: none"> • Greenhouse gas emissions • Data management • Ethical dealings • Disaster relief 	<ul style="list-style-type: none"> • Growth/Profit/Returns • Capital Investments • Corporate governance • Sustainability leadership
HOW WE ENGAGE	<ul style="list-style-type: none"> • Newsletters • Engagement surveys • Employee briefings – depot roadshows • Appraisals 	<ul style="list-style-type: none"> • Expanded value proposition • Single point of contact • Customer surveys • Customer service initiatives 	<ul style="list-style-type: none"> • Environmental impact • Volunteering • Charitable work 	<ul style="list-style-type: none"> • Review meetings • Active relationship management with various groups

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- Megatrends – Global Trends

Megatrends Help Establish Long-Term Product Development Strategies

GLOBAL MARKETPLACE	PRODUCTIVITY	SHARING ECONOMY	DIGITAL FUTURE	URBAN WORLD
<ul style="list-style-type: none">• Faster easier communication• Requirement to adapt	<ul style="list-style-type: none">• Labour shortages• Wage growth will drive this• Prediction that 47% of jobs will be automated in 20 years	<ul style="list-style-type: none">• Protocols for the sharing of data across platforms• BIM	<ul style="list-style-type: none">• On demand services<ul style="list-style-type: none">• Uber• Hotels• Flights• New generation training & On-line training• Virtual reality<ul style="list-style-type: none">• Training• Augmented reality<ul style="list-style-type: none">• Design of buildings	<ul style="list-style-type: none">• Equipment<ul style="list-style-type: none">• Lighter• Narrower• Greener• Engine regulations• Low emission zones

Data is the common thread that binds all Megatrends

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Sustaining Our Industry Together

- Challenges for Rental & IPAF

- Technology

- Training

- Delivery
 - Virtual Reality
 - New Generation training
- How individuals learn

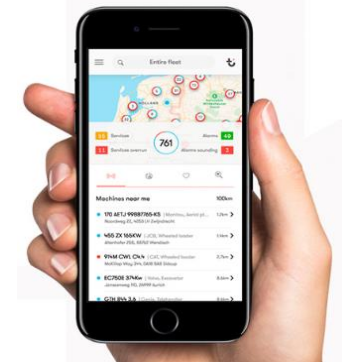
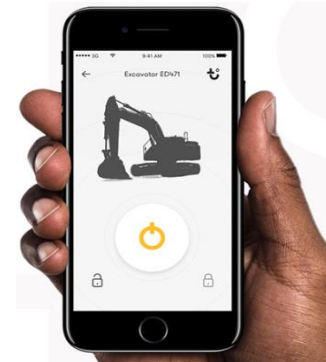


- Training Administration

- IPAF Questionnaires
- Card Production & Distribution
 - Linked to mobile phone
 - Issued via training centre

- System Compatibility

- IPAF card linked to system access



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- Challenges for Rental & IPAF

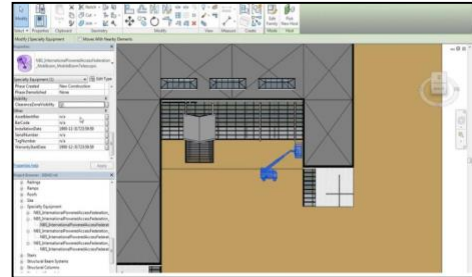
- Technology

- Product Development

- Environmental

- Efficiency

- IPAF manufacturers Technical Committee



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- **Challenges for Rental & IPAF**
 - **Financing**
 - New financing models
 - Traditional financing
 - Asset based lending
 - The challenge is three-fold:
 - Buy well
 - Rent well
 - Sell well
 - **Legalisation**
 - BS 8460:2017 Code of practice for the safe use of MEWPs
 - Emission standards
 - Working practices
 - All Party Parliamentary Group (APPG) inquiry into workplace falls from height
 - Working collaboratively with other organisations internationally

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- **Challenges for Rental & IPAF**
 - **Operational**
 - Customer interaction
 - Amazon
 - Kayak
 - Keeping customers informed throughout the process
 - Web ordering
 - Rental
 - Training
 - Machine familiarisation
 - Videos
 - Online quick reference materials

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- **Challenges for Rental & IPAF**

- **Operational**

- Servicing & Breakdown Support
 - Augmented reality
 - Technological challenges in remote areas
- System Compatibility
 - Unauthorised access
 - Data sharing

- **Staff Recruitment**

- Aging workforce
- Requirement to attract younger workers
- Changing skills sets
- Apprenticeships/NVQ's
- Career opportunities

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Thank You

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