
Ladies and Gentlemen

女士们先生们，大家好！

It is a great pleasure to be here with you today in Shanghai.

My name is Tim WHITEMAN and I am the Managing Director of the International Powered Access Federation. This is generally known as IPAF. This year, IPAF is 25 years old and I would like to take a few minutes to tell you who we are and what we do for the powered access industry.

我非常高兴今天能够与大家在一起。我是替姆·怀特曼，现任国际高空作业联合会的执行董事。该联合会通常被简称为 IPAF。时至今日，IPAF 已经 25 岁了，在此给大家介绍我们是什么样的组织，我们为高空作业这个行业做些什么。

IPAF is a not for profit organisation which is owned by the members. The members are a mixture of world famous manufacturers, leading rental companies and many small manufacturers and rental companies. It is very unusual for manufacturers and rental companies to be represented by the same association. We now have almost 700 members spread across the world. This slide shows the logos of some of our members. Why are these companies members?

IPAF 是个非赢利组织，属于所有会员。会员中既有世界知名的生产商，也有国际领先的租赁公司，还有很多的会员是较小的厂家和租赁商。生产商和租赁商同时为一个组织所代表这是非同寻常的一件事情。目前我们拥有遍布全球的 700 个会员。

现在诸位看到的是一些会员的公司徽标；这些公司为什么会成为会员呢？

Because they believe that our industry needs an organisation to promote the safe and effective use of powered access.

因为他们坚信本行业需要一个组织来倡导安全高效地使用高空作业设备！

I P A F was started in 1983 in the UK and our headoffice is still in the county of Cumbria in the UK's beautiful Lake District. This is about one hour north of Manchester. I became Managing Director in 2003 and am based at I P A F's second office in Basel, Switzerland. We also have representatives based in Germany, France, Italy, Spain, The Netherlands and the USA.

I P A F 成立于 1 9 8 3 的英国。我们的总部依然在英国美丽的湖区堪布里亚县。这里往北距离曼彻斯特有一个小时的车程。2 0 0 3 年我成为执行董事，主要在 I P A F 设于瑞士巴塞尔的第二个办公室工作，我们在德国，法国，意大利，西班牙，荷兰以及美国均设有办事机构。

From those humble beginnings 25 years ago I P A F has reached the point where I believe that our members make more than 80% of all powered access equipment worldwide. Included in that figure are all the types of equipment that you see in this picture.

一个寒酸地始于 2 5 年之前的组织而今其会员所生产的高空作业设备占全球总量至少 8 0 %，大家在这个图片中可以看到其中门类齐全的设备。

I also believe that our rental members own nearly 50% of all powered access equipment and that figure is rising rapidly as more and more companies sign up to be members.

我确信我们的租赁商拥有至少总量 5 0 % 的高空作业设备，而这个数目正在快速增长，因为更多的单位在申请加入 I P A F。

While I P A F started out as a UK organisation today we have members all over the world and less than half of our members are based in the UK.

我们起源于英国，现在会员遍布世界各地；其中 4-5 成 会员是英籍。

So what can we do for our members? We offer them a large amount of technical expertise. Our country representatives all have many years of experience in the business. In the US, for example, Tony Groat is the former Number 2 at NES Rentals, one of the largest rental companies in the US. In the Netherlands we have Hans Aarse who worked for many years with JLG and in Spain we have Romina Vanzi who is an expert on the subject of Mast Climbing Work Platforms. In France Pascal Deher has worked with rental companies for many years and Gerhard Hillebrand in Italy was a senior executive with Simon. In Germany Reinhard Willenbrock combines experience of having worked with leading rental company Mateco and having run JLG and Manitou dealerships. In the UK our international training manager is Rupert Douglas-Jones who was a fleet manager with one of the UK's largest rental companies and Gil Male, our technical officer was formerly a senior inspector with Her Majesty's Health & Safety Executive.

我们能为会员做什么呢？给他们提供大量的专业知识；我们分布在各国的代表都有多年的从业经验。比如在美国，托尼曾经是 NES 租赁的二手手；NES 租赁可是美国最大的租赁公司之一啊！在荷兰，我们有汉斯，他曾经为 JLG 效力多年。我们的西班牙代表，罗密那是

桅杆攀援专用高空作业平台的行家；法国的帕萨尔为租赁公司工作多年；意大利的格哈德从前是西门公司的高级管理者；德国的代表李恩哈德曾经是 JLG 和曼尼托的经销商也曾为 MATECO 租赁公司立下汉马功劳；在英国我们的国际培训经理 卢颇特，曾参与管理英国最大的租赁公司，我们的技术官员吉尔，一度是女王陛下健康和安方面的高级督察员！

Our members benefit from the work of these industry experts and in particular from the monitoring that they do on their behalf. If there is a new law relating to this industry proposed in Germany, we know about it, we analyse it and if necessary we campaign to have it changed. IPAF has representatives on the all important ANSI committees in the US, the ISO committee responsible for ISO 16368 on design standards and the

committee responsible for EN280 in the European Union. We lobby for sensible revisions to these standards and keep our members informed of the effects of changes through the influential IPAF Manufacturers Technical Committee.

我们的会员可以从上述专家那里获益匪浅；如果在德国有某项新的行业法规被提议，我们会很快知晓并加以分析，如果有必要，我们会发起攻势对其加以改变； I P A F 在所有重要的美国 A N S I（美国国家标准协会）的委员会都有代表，在负责 I S O 1 6 3 6 8 设计标准的委员会中同样有 I P A F 的代表，在欧盟的 E N 2 8 0 委员会也有我们的代表。我们为了有效修订这些相关的标准而游说，并且通过颇有影响力的 I P A F 生产商技术委员会告知会员们我们的努力结果。

Committees are the backbone of any successful association and IPAF has many active committees that involve its members. Delegates working on those committees freely give of their time to help the industry. IPAF's supreme decision making body is the IPAF Council. Members elect a president who serves for two years and we are very fortunate to have with us today John Ball who was elected president in April this year – the interesting thing about this is that I get a new boss every two years!!!! One of our newest committees is a regional council for North America. This brings together representatives from major manufacturers and rental companies to discuss industry wide issues. It is, of course, important to note that IPAF members can never discuss prices at meetings as that would be illegal in many countries.

委员会是任何协会成功的基石； I P A F 有很多由会员参与的活跃的委员会：在委员会工作的代表无私地为本行业奉献他们的时间。

I P A F 的最高决议机构是 I P A F 理事会； 由会员选举总裁任期两年；在这里我们荣幸地请到今年四月当选的总裁约翰先生出席会议——非常有趣的是，本人每两年要换一次新老板啊！我们最新的委员会是北美的区域理事会；所有上述委员会可以把业内主要的生产商

和租赁商召集在一起讨论本行业的重要议题；必须一提的是，IPAF 的成员在会议中绝对不可以讨论价格，因为这在很多国家是非法的！

IPAF also offers many other benefits to members. These include a variety of conferences, seminars and other networking events. We sponsor the APEX exhibition and Access International magazine is our official journal which is sent free to members. We have additional benefits in some countries, such as favourable insurance rates in the UK and USA. A service that we offer worldwide is the use of the world famous business research team of the Institute of Directors in London. A team of 25 researchers will answer members' calls on any business subject eg how can I find the address of all German tree surgeons, or how do I reclaim Value Added Tax in Germany? This service is free to all members.

I P A F 同时给会员们提供很多其他的权益。包括一系列的研讨会和业界大事。我们赞助 A P E X 展览会；高空作业杂志是我们的官方期刊；免费邮寄给会员参阅；在有些国家我们还有额外的权益，比如在英国和美国的优惠保险费率，在全球范围内给我们的会员提供伦敦知名专家研究院的服务；该研究院有 2 5 位专家，可以回答诸如如何找到德国树的外科医生的地址，或者怎么可以退回德国的增值税？此项服务对会员是免费的。

One of the services for which we are famous is the IPAF operator training programme and I would like to explain why we offer this and how it works.

I P A F 最为出名的服务是我们的操作员培训计划；在此我要解释为何要做培训，以及如何开展培训。

First of all IPAF believes that accidents should not happen in this business. The powered access business is very young, only about 30 years old, but has grown very fast because it offers a safe and effective way of doing temporary work at height.

首先，I P A F 坚信本行业不该出事故；高空作业是一项年轻的事业，只有 30 年；但是发展迅速，因为它提供安全有效的临时性的高空操作。

I has been very successful because it is safe. Accidents are a tragedy and are very bad for business. Every serious accident has a terrible effect on the people affected, their families and their work colleagues. Most accidents in this business are completely unnecessary and are due to mistakes caused by a lack of training by the operator or the manager.

我们成功是因为它安全；任何事故都是悲剧，对生意很不好，每个严重事故对相关的人员包括其家庭，同事影响极坏。大多数事故都是绝对不该发生的，起因总是源于缺乏培训的误操作或者错误指导等等。

IPAF's members believe that the best way to keep this industry safe while it grows is to train as many people as possible so that it is never necessary to use an untrained operator. For this reason its members have developed a standard operator training and testing programme. This takes less than a day, involves classroom and practical training and is conducted in small classes. If the students pass the test they receive the yellow Powered Access Licence (PAL Card) which is valid for five years and shows what kind of equipment they can use.

I P A F 的成员相信保证本行业安全成长的措施就是让尽可能多的操作员接受培训，这样则可以避免使用未经培训的操作员。因此，会员们总结出了标准操作员的培训以及考核的计划。培训可以在一天内完成，包括理论的和实际操作的培训，培训以小组进行。如果学员通过考核，他们拿到黄色的 P A L 卡—高空作业上岗证；五年有效，注明可以操作的设备类别。

IPAF does not itself deliver any training. It develops training materials and systems which approved training centres can use. IPAF-approved training centres must comply with our standards are are audited by IPAF staff. We

have the right to visit the centres without an appointment and observe a class at any time. We know where training is being held all around the world today because all training must be registered on-line with us 24 hours in advance. If students pass the course, then the instructor, who must hold an IPAF instructor card, goes online to register the successful students. We then check the course registration details for any errors and issue the card which is valid for 5 years. The IPAF-approved training centres are free to set their own prices and pay us a fee per Card issued. This programme is certified by TÜV according to ISO18878 standard. We are the only programme in the world that is certified as complying with this standard. The voluntary programme is extremely successful and this year more than 80,000 people will do the training. Training centres make money from the training which encourages them to train more people. Every year, they receive updated training materials from IPAF.

I P A F 本身不进行任何培训；它给培训中心提供培训材料和系统；I P A F 认证为合格的培训中心必须执行我们的标准，所有培训中心必须由 I P A F 员工进行审计。我们有权随意造访任何培训中心，考察授课情况。我们随时掌控全球范围哪里在进行培训——因为所有培训必须提前 2 4 小时跟我们在线登记，某个学员成功通过培训后，一个执有 I P A F 指导员卡的人员将在线登记该学员，我们检查所学科目是否属实并且颁发有效期 5 年的上岗证。 I P A F 认证合格的培训中心可以自己制定培训收费标准，每个上岗证给 I P A F 支付一定的费用，该培训计划是由 T U V 按照 iso18878 标准认证的。只有我们的培训计划是符合标准的！此项计划非常成功，今年将有超过 8 万人接受培训。培训中心通过提供培训而有盈利，从而鼓励他们进行更多的培训。每年培训中心都会从 IPAF 收到更新的培训材料。

IPAF is committed to keeping accidents to an absolute minimum. We believe that if industry is best placed to create appropriate training. I believe that if industry does not create suitable training, government will mandate training and can produce inflexible and bureaucratic systems that stifle the use of aerial work platforms. For this reason I urge you to

encourage the development and use of standardised operator training materials which save life and help to keep your business safe.

IPAF 旨在将事故控制在最低水平。我们坚信提供恰如其分的培训会使本行业稳定健康发展，反之，如果行业本身不搞培训，政府部门就会委托培训，这样就会产生官僚机构制约高空作业设备的使用，所以，我想督促你们鼓励开发和使用标准的操作员培训材料，这样会挽救生命，有助于促进你们的生意安全地发展！

Trained operators are safer, cause less damage to equipment and do the job more effectively. It is in your industry's interests to train operators.

经过培训的操作员更加安全，对设备减少损害，可以更加有效地完成工作。总之培训操作员对你们的行业发展有百利而无一害！

This graph shows how training has developed in the UK during the last few years. This reflects the success of the training programme AND the growing fleet size in Europe. As you will know, there is serious concern in Europe and the USA about the effects of the current economic slowdown on the powered access market. However, just one year ago people were very confident and were still buying equipment. The UK market has grown rapidly. It is thought that around 8000 new machines entered the market in 2007. This year? We are waiting to see but it will be lower.

+这个图表显示最近几年在英国培训的发展历程。大家可以看到培训计划的 success 和团队的迅速壮大。众所周知，欧美业界人士对当前经济衰退将给本行业带来的负面影响忧虑忡忡！然而，仅仅一年以前，人们还信心百倍，采购踊跃，英国市场需求增长旺盛；据估计，2007 年大约 8 千台机器进入了英国市场。今年呢？数据尚不明朗，但是明显会减少的！

One big difference between the markets in North America/Europe and the market in China is the importance of rental companies. Most manufacturers in North America or Europe will tell you that they sell 80%

of their equipment to rental companies. How is this possible? The next time you go to Europe or North America, take a normal telephone book and look under “rental”. You will find that it is possible to rent every kind of equipment for one day or one week. From excavators, to drills, to cement mixers to aerial work platforms. If a school wants to fix lights on the front of the building, it will rent a platform for one day. If a contractor wants to build a large storage hall, it could rent six booms and six scissors for 8 weeks. The contractor will probably not buy any aerial work platforms. Why? Because the rental company is a specialist company that will take care of all maintenance requirements and will deliver specialist equipment that is perfect for the job. If the contractor buys platforms, he must maintain the equipment and will often find that he does not have the right machine for the job. It is much easier for him to rent different machines for each job.

中国与欧美市场之间的最大区别是租赁公司的重要性：北美或者欧洲的生产商大多会说它们产品的 80% 销售给租赁商。你会问这怎么可能呢？下次你去欧洲或者美国，随便拿个电话黄页，在租赁栏目下寻找，你会发现无论你租什么样的设备，一天或者一周，皆有可能！从挖掘机，到钻探机，或者混凝土搅拌机，以及高空作业平台，无所不包！如果某个学校要在教学楼前安灯，他们会租个平台使用一天；如果某个承包商要建个大仓库，他会租赁六台臂架机器人和六台剪叉式机器人，为期八周。承包商不会买任何平台设备的。因为租赁商是专业公司可以照顾到维修保养各个方面；并且提供最适合某项工作的专用设备。可是承包商一旦买了某个机器，他常常会发现当他要保养设备时竟然没有适合的工具。所以租赁各类设备更加容易！

Different countries have different levels of development in their rental markets. In the UK, USA, Canada, France, Netherlands and Scandinavia you can rent anything anywhere. If you go to Germany, Italy, Spain the concept is growing fast. If you go to Eastern Europe there are new rental companies that are just starting. IPAF is working with the European Rental Association to research the size of the rental market in Europe and

with the American Rental Association to research the size of the market in the US. We estimate that there are more than 8000 rental companies in the UK. About 5500 are owned and operated by one man eg one man with an excavator. You can rent him and his machine by the hour, the day or the week. This means there are about 2500 serious rental companies – these offer every kind of equipment – excavators, drills, generators, heating equipment and many of them offer aerial work platforms. Some of them are specialists and only offer aerial work platforms. The largest specialist is the Lavendon Group which owns Nationwide Platforms and Panther Platforms. Together these companies own about 7500 aerial work platforms. This same company also runs IPAF approved training centres and trains about 20,000 people every year!不同国家的租赁市场发展水平各异。在英国 / 美国 / 加拿大 / 法国 / 荷兰和斯堪的纳维亚，你可以在任何地方租到任意的设备。在德国 / 意大利 / 西班牙，租赁的理念正在快速发展；如果你到东欧，那里新的租赁公司正在开始。IPAF 目前在与欧洲和美国的租赁协会合作以调研那里的市场规模。我们估计在英国 8 千多租赁公司；其中可能有 5 5 0 0 个是光杆司令公司，比如他有一台挖掘机，你可以按照小时或者天数等雇佣他。也就是说，大概 2 5 0 0 个租赁公司规模较大；他们提供门类齐全的设备；其中大多数会有高空作业平台。有些是很专业的，只租赁高空作业设备。最大的专业公司是 拉文登集团：他们拥有全国平台租赁和潘泽平台租赁。这些专业公司大概拥有总数达 7 5 0 0 的高空作业设备。该公司在经营 IPAF 认证的培训中心，每年培训大概两万人。

If we look across Europe I estimate that the total value of the general rental business is about €23.5 billion (€23,500,000,000). Of this, about 20% is from aerial work platforms which gives a total value of about €5 billion. This is the estimated rental income from aerial work platforms in 2007. The five largest economies, the UK, Germany, Spain, Italy and France account for 77% of this.

纵观欧洲，我估计租赁业务的总额是 2 3 5 亿欧元，其中 2 0 % 来自于平台租赁，数额大概是 5 0 亿欧元。这些数字是 2 0 0 7 年的。欧洲的五大经济体：英国，德国，西班牙，意大利和法国占有 7 7 % 的份额。

In the US the American Rental Association estimates that the total income from rental equipment is US\$26.6 billion (\$26,600,000,000). Of this about 35% is from aerial work platforms which gives a total value of \$9 billion. IPAF is currently preparing its first ever reports on the US and European rental markets and these will be published early next year. It is very difficult to get reliable data on the rental industry and we are trying to calculate the “penetration” of the rental industry ie what proportion of the construction equipment market is supplied by rental and what is supplied by equipment owned by the end user. It is already clear that the rental companies are the most important part of the construction equipment market in Europe and North America. In China this market hardly exists. I am sure that the rental market in China will develop and that it will become a very significant part of your market.

美国租赁协会估计设备租赁业总收入是 2 6 6 亿美元，其中 3 5 % 是高空作业平台， 数额是 9 0 亿美元。 I P A F 正在准备我们的第一份欧美租赁市场报告，预计明年年初出版该报告。大家知道，想了解租赁业的准确数据是很难的；我们在努力计算租赁业的渗透力到底多大：比如说，建筑设备市场中多大比例是租赁商的，又有多少比例是使用者自有的设备？显而易见，在欧美租赁公司是建筑设备市场最重要的力量。而在中国，租赁市场几乎尚未形成。我相信，中国的租赁市场将会很快发展起来，从而成为你们市场中一股重要的力量。

I hope that I have been able to give you some information about IPAF and the work that we do. I have with me some further information including CDs and I hope that you will take these with you.

Thank you for your attention.

我真诚地希望通过本人的介绍你们可以了解 I P A F 和我们的工作。这里有更多的资料，包括 C D，你们可以带走。

非常感谢各位！

+这个图表显示最近几年在英国培训的发展历程。大家可以看到培训计划的成功和团队的迅速壮大。众所周知，欧美业界人士对当前经济衰退将给本行业带来的负面影响忧虑忡忡！然而，仅仅一年以前，人们还信心百倍，采购踊跃，