



**SDTF/05/21**

# **Stakeholder Maps for the British Cement Industry**

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Forum for the Future is a UK-based sustainable development charity working to accelerate the transition to a sustainable way of life. We have partnerships with business, local authorities, regional bodies and universities, working with them to deliver a shared commitment to sustainability. We provide advice and develop partnership work on issues as diverse as climate change, procurement strategies, environmental accounting and the digital divide. We also communicate what we learn with our partners to a wider network of decision-makers and opinion formers and run a number of cutting edge projects engaging with a much wider audience of NGOs, business, higher education and government on key sustainable development challenges.

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## 1 INTRODUCTION

The BCA is currently developing a wide range of sustainability initiatives as part of the SD task force. Enhancing stakeholder dialogue is a key component of this wider project. As a first step, this document outlines a preliminary stakeholder map for the British cement industry. This is supplemented by an issues matrix to signal areas of concern to different stakeholder groups.

These findings will feed into a structured stakeholder dialogue process, which will involve key stakeholders to roundtables to discuss cement sustainability issues. The issues matrix can be populated more accurately after this dialogue.

## 2 METHODOLOGY

The stakeholder mapping process aimed to identify the key players in the cement and sustainability agenda, to ensure that the cement stakeholder roundtables are broadly representative of the key players in cement and sustainability – either as members of the panel or part of a wider process of involvement. The methodology was based on standard stakeholder mapping approaches, our understanding of the industry and working within certain resource limitations. The broad process consisted of four stages, described below

### 1. **Research**

Desk research into the life cycle of Cement, drawing on reports and web based information to gain a clear understanding of the processes involved in the production, use and disposal of cement.

### 2. **Initial mapping**

Following this session, a draft stakeholder map was prepared. The map breaks the main stakeholder groups down into subcategories and identifies specific representatives where possible.

### 3. **Issues Matrix**

An initial issues matrix was developed for the 5 main stakeholder categories identified in other work by the BCA. This is a preliminary mapping based on results from the reputation audit and other analysis, including stakeholder dialogues conducted as part of the WBCSD CSI project. This matrix will need to be refined further once stakeholders have been prioritised.

### 4. **Prioritisation of stakeholders**

The stakeholder map and the issues matrix will provide the base for stakeholder prioritisation. This was done in collaboration with BCA representatives at a meeting in London in early May 2005. An influence/impact model was used to aid the prioritisation process. The results are presented in section 6 on page 20.

## 5. Final mapping and reporting

The findings of the prioritisation process should result in a more focused stakeholder map and provide a list of key stakeholders to invite to the stakeholder roundtables to be held over summer 2005. Once stakeholders have been identified, key individuals and contact details will be obtained for invites. This will use BCA contact databases, Forum For The Future contacts and other sources.

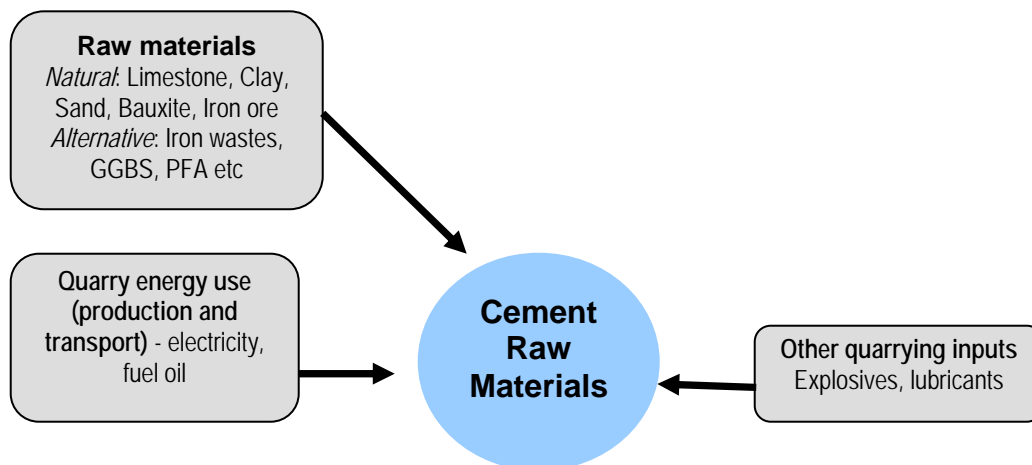
## 3 CEMENT LIFECYCLE STAGES

In order to ensure analytical consistency, the cement lifecycle used in this mapping is based upon the lifecycle stages developed as part of the Business Case project currently underway through the SD taskforce; particularly the impact analysis and balance sheet work with Forum for the Future.

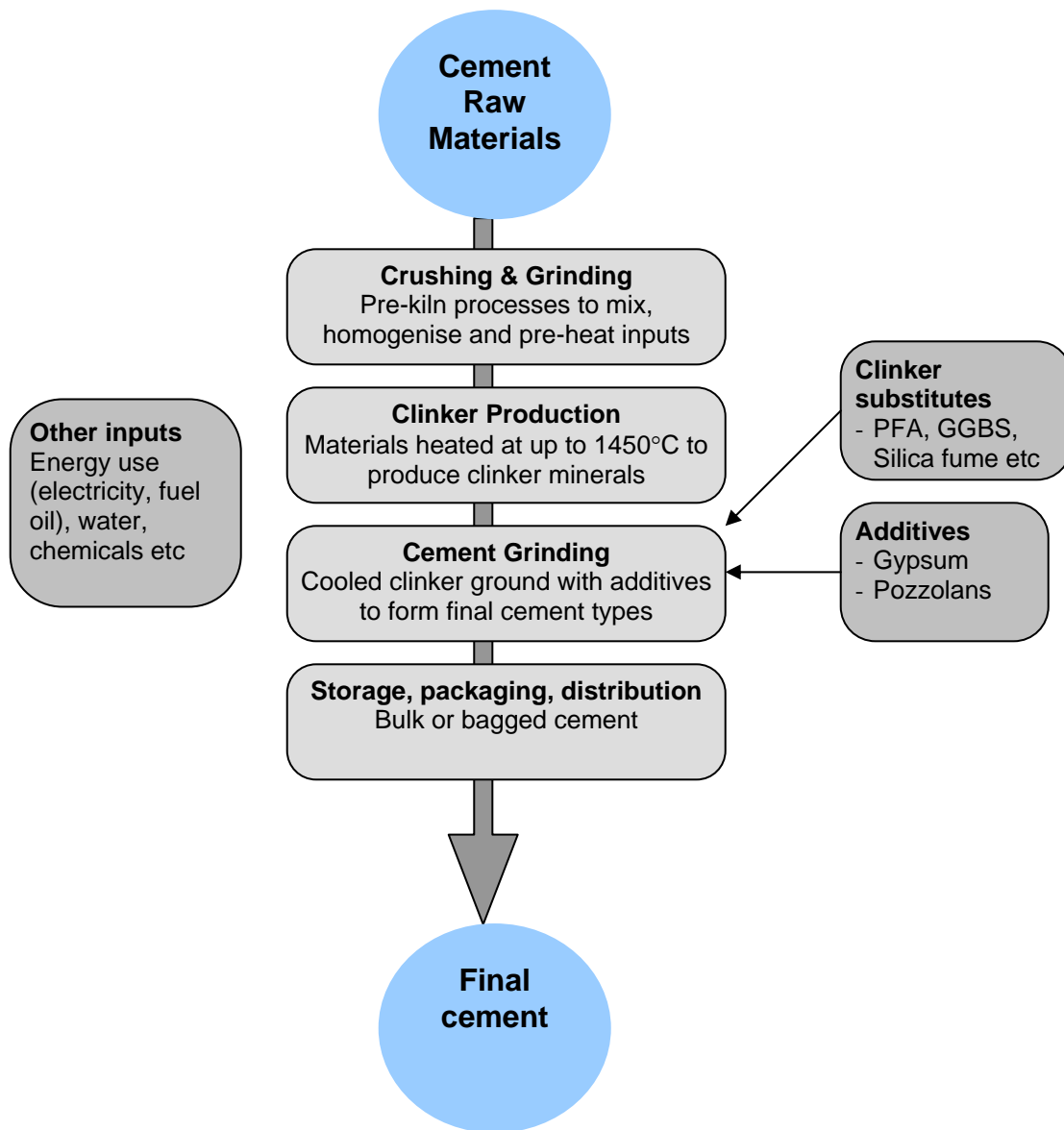
1. **Raw Material Extraction:** Quarrying of limestone, chalk, shale, clay and iron oxide for the manufacture of cement.
2. **Cement Manufacture:** Including all crushing, grinding, clinker production and final cement grinding processes
3. **Concrete & Precast (Construction):** Cement, sand, gravel and water combined to produce concrete and precast elements, this stage includes the use of building materials in construction of buildings and structures.
4. **Buildings, Infrastructure (In Use):** Concrete, precast, mortar and grout in use provide buildings, roads, bridges, dams, hospitals, and schools.
5. **End-of-Life Disposal or Recycling:** Reuse of building itself; Concrete waste recycled for use in the production of cement; concrete ground and used as fill, or landfill. (e.g. use of crushed concrete for fill, reducing the need for virgin fill materials)

### Cement life cycle

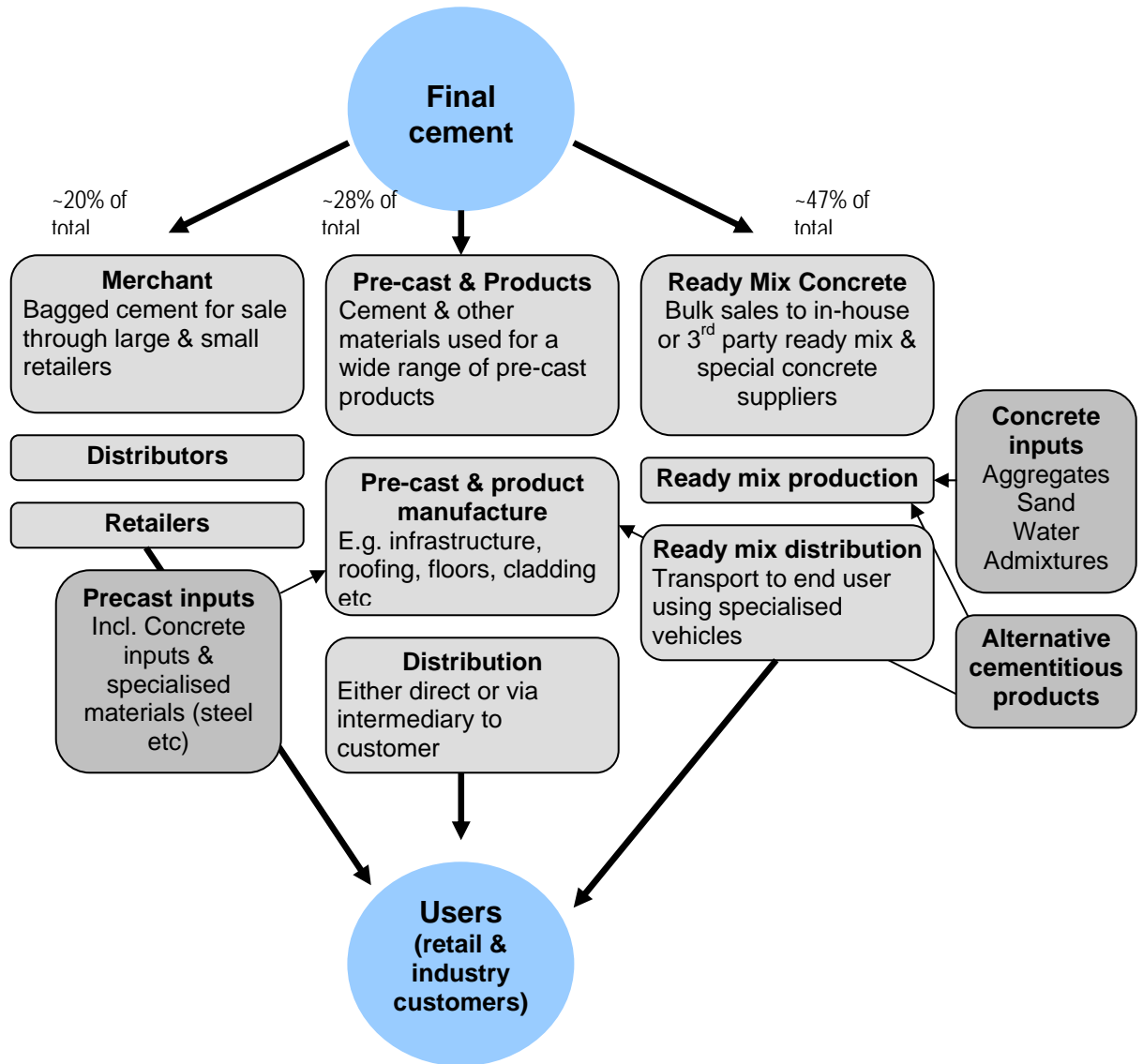
Stage 1 – Raw material extraction



**Cement life cycle**  
Stage 2– Cement manufacture

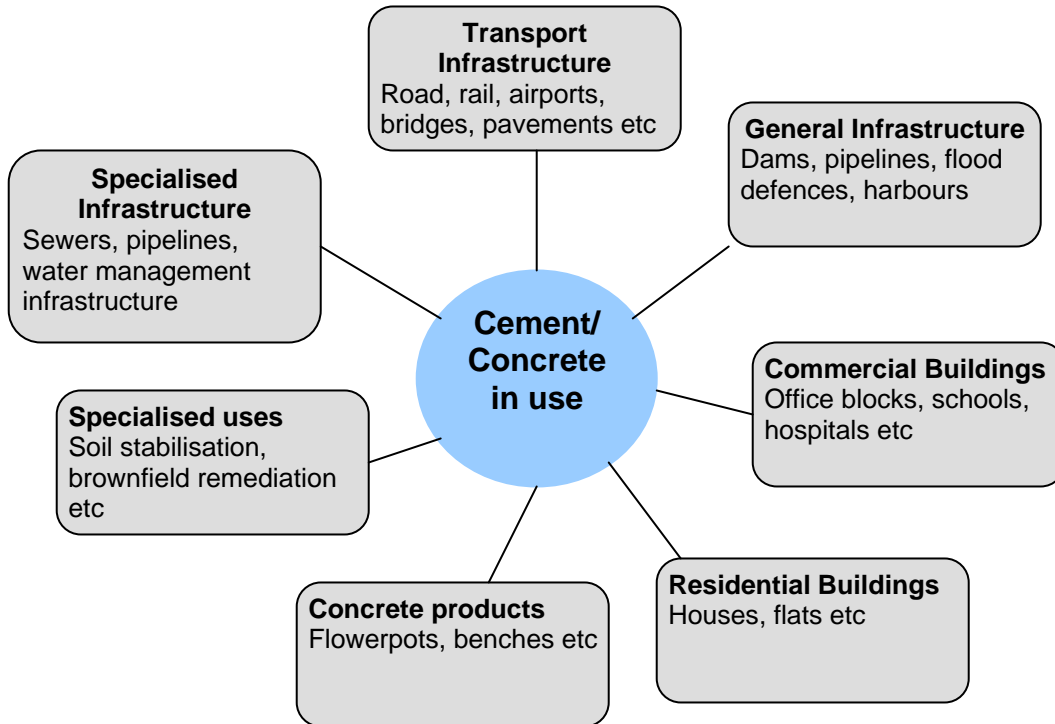


**Cement Life cycle**  
**Stage 3 – Concrete & Precast**

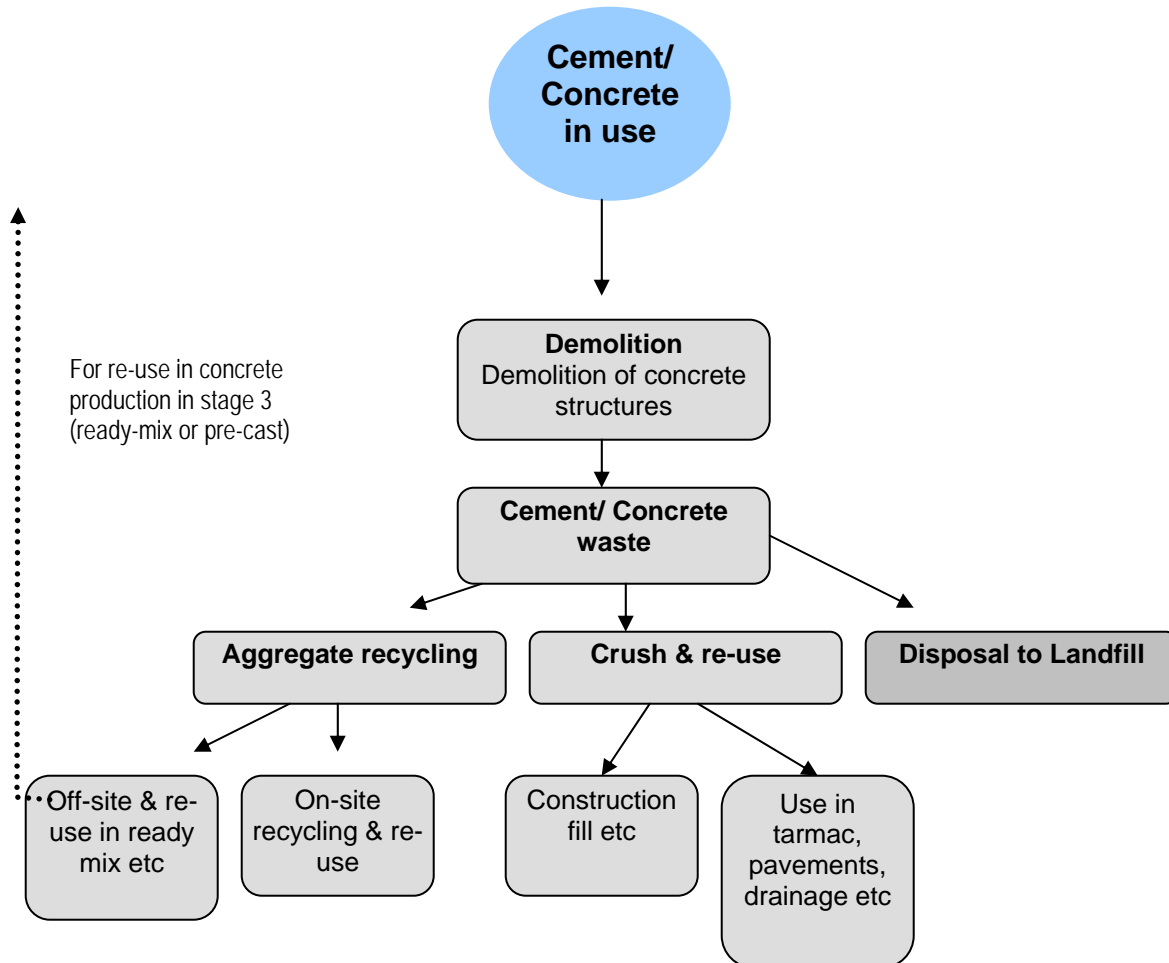


## Cement life cycle

### Stage 4 – Cement/ concrete in use (buildings & infrastructure)



**Cement lifecycle**  
**Stage 5 – End-of-life disposal or recycling**



**4 – STAKEHOLDER MAPS**

These stakeholder maps identify and breakdown key stakeholder groups for 5 stages of the cement lifecycle as well as a final whole lifecycle map. These boundaries may not be clear-cut in practice and some repetition is inevitable. The BCA will need to decide where to draw boundaries within the lifecycle for its stakeholder consultation purposes.

<b>STAGE</b>	<b>KEY STAKEHOLDER GROUP</b>	<b>SUB-CATEGORIES</b>	<b>SPECIFIC EXAMPLES</b> (non exhaustive list)
<b>STAGE 1 - RAW MATERIAL EXTRACTION</b>	Employees	Unions	TGWU
	Suppliers	Quarrying energy use	Electricity companies Fuel oil suppliers
		Equipment suppliers	Eg parts suppliers for diggers, JCB etc
		Transport to cement manufacturing site	Fuel oil
	Companies	Quarry companies (most quarries in-house to cement companies, sited near facilities)	Buxton Lime Industries, Castle Cement, Lafarge Cement, Rugby Cement
	Regulators		Environment Agency Local Authorities HSC, HSE
	Trade bodies, Professional associations		Quarry Products Association, Institute of Quarrying
	Local communities	Local Interest /Pressure Groups	
		Local Politicians	Local MPs, local government – councillors etc
		Community Associations	

<b>STAGE 2 – CEMENT MANUFACTURING</b>	<b>Alternative Raw Material suppliers</b>	PFA - Electricity generators GGBS suppliers Steel (for slag, ash)	GGBS suppliers – Appleby Group, Civil & Marine Slag Cement Ltd PFA suppliers – Scottish & Southern Energy, EON UK, National Ash, British Energy
	<b>Energy suppliers</b>	<b>Conventional energy</b> – electricity, fuel oil	
		<b>Alternative energy</b> – waste solvents, plastics etc	SRM Ltd. – Cemfuel, profuel, Recovered Oil Association, Sapphire, Galcier ARM, Biffa etc
	<b>Additive suppliers</b>	Gypsum, cementitious materials, pozzolans, other additives	Alcan Chemicals UK, Surechem UK,
	<b>Companies</b>	<b>UK Cement producers</b>	Buxton Lime Industries, Castle Cement, Lafarge Cement, Rugby Cement
	<b>Employees</b>	<b>Unions</b>	TGWU
		<b>Works Councils</b>	
		<b>Training Institutions</b>	
	<b>Regulators</b>		Environment Agency Local Authorities near cement plants (15 in total?) HSC, HSE
	<b>Trade Bodies</b>		British Cement Association (BCA), UKCSMA,
	<b>Standard setters</b>		BSI, EU standards, ISO, UKAS, CEN (Eu harmonised standards) ODPM – Building Regs & Fire standards
	<b>Distribution companies</b>	<b>Transport &amp; logistics providers</b>	Road/ rail freight - EWS, GB Railfreight
	<b>Local communities</b>	<b>Local Interest /Pressure Groups</b>	The Air we Breathe, Welsh Groups Network, CANK, NACK, Rugby in Plume (RIP)
<b>Local Politicians</b>		Local MPs, local government – councillors etc	
<b>Neighbours</b>		Immediate facility neighbours and those affected by transport movements	

		<b>Statutory consultees</b>	PCTs, Local Authorities and others	
<b>STAGE 3 – CONCRETE &amp; PRECAST</b>	<b>3a Merchant</b>	<b>Builders Merchants, Distributors etc</b>	DIY retailers: B&Q, Homebase, Wicks, Focus, Builders Merchants Federation	
		<b>End users</b>	Builders & individuals doing DIY projects	
		<b>DIY Advisors</b>	Architects, DIY magazines, TV shows etc	
	<b>3b Ready mix</b>	<b>Ready mix companies</b>		LaFarge, Aggregate Industries, Tarmac, Cemex (RMC) etc
		<b>Ready mix clients</b>		Construction companies: Carillion, Skanska, John Laing, Taylor Woodrow etc. Housebuilders
		<b>Contractors</b>		AMEC, Edmund Nuttall, J Murphy & sons
		<b>Construction Clients</b>		Public sector – NHS, Highways Agency, Local Councils, OGC etc; Private sector – Corporate clients, utilities etc
		<b>Architects – SPECIFIERS</b>		Associations (RIBA), training schools – Institute of Concrete Technology
		<b>Consultants – SPECIFIERS</b>		Arup, Atkins, FaberMaunsell, Halcrow, AEA Technology, Laing O Rourke, Mowlem, Buro Happold
		<b>Trade Bodies</b>		The Concrete Society, Concrete Centre, UKQAA, UKCSMA, Construct, QPA (BRMCA)
		<b>Concrete plant &amp; equipment</b>		Numold UK, Krejler APS,
		<b>Concrete Inputs</b>	<b>Aggregates</b>	Aggregate Industries, LaFarge Aggregates, Tarmac, Brett Group
			<b>Sand</b>	Hanson UK, Brett Group, The Chap Group
<b>Admixtures</b>	Cemex UK, CementAid UK, Degussa Construction Chemicals			
<b>Alternative cementitious</b>	<b>GGBS</b>	GGBS suppliers – Appleby Group, Civil & Marine Slag Cement		

	<b>materials</b>	<b>PFA</b>	PFA suppliers – Scottish & Souther Energy, EON UK, National Ash, British Energy	
<b>3c Precast &amp; products</b>	<b>Precast producers &amp; suppliers</b>		Buchan Concrete Solutions, Tarmac Precast, LaFarge Concrete Products, Forticrete Ltd, RMC Materials	
	<b>Precast clients</b>		Construction companies: Carillion, Skanska, John Laing, Taylor Woodrow etc	
	<b>Contractors</b>		AMEC, Edmund Nuttall, J Murphy & sons	
			Public sector – NHS, Highways Agency, Local Councils, OGC etc; Private sector – Corporate clients, utilities etc	
	<b>Architects – SPECIFIERS</b>		Associations (RIBA), training schools – Institute of Concrete Technology	
	<b>Consultants – SPECIFIERS</b>		Arup, Atkins, FaberMaunsell, Halcrow, AEA Technology, Laing O Rourke, Mowlem, Buro Happold	
	<b>Trade Bodies</b>		British Precast Concrete Federation (BPCF), Concrete Structures Group, The Concrete Society, Concrete Centre,	
	<b>Concrete plant &amp; equipment suppliers</b>			Numold UK, Krejler APS,
	<b>Precast Inputs suppliers</b>	<b>Aggregates</b>		Aggregate Industries, LaFarge Aggregates, Tarmac, Brett Group
		<b>Sand</b>		Hanson UK, Brett Group, The Chap Group
		<b>Admixtures</b>		Cemex UK, CementAid UK, Degussa Construction Chemicals
		<b>Other inputs</b>		Steel, Glassfibres - Arminox UK, BRC Special Products,
	<b>Alternative cementitious material suppliers</b>	<b>GGBS</b>		GGBS suppliers – Appleby Group, Civil & Marine Slag Cement Ltd
		<b>PFA</b>		PFA suppliers – Scottish & Souther Energy, EON UK, National Ash

<b>STAGE 4 – CEMENT/ CONCRETE IN USE</b>	<b>Commercial/ Industrial (large scale) application</b>	<b>Construction clients</b>	<b>Construction companies – PFI</b>	Eg Skanska Integrated Projects, Carillion, Balfour Beatty, Bouygues UK, Jarvis
			<b>Public sector</b>	Highways Agency, Environment Agency (flood defences etc), English Partnerships
			<b>Private sector</b>	Corporate clients, utilities, land developers etc
		<b>Managers</b>	<b>External facilities Managers</b>	Ecovert UK, Amec, Atkins Asset Management, Taylor Woodrow, Mowlem Aquamen
			<b>In-house facilities managers</b>	
		<b>Certifiers</b>	<b>Energy Standards</b>	BRE (BREEAM), Building Regs (Part L) (ODPM)
	<b>Other standards?</b>		Fire regulations etc ODPM	
<b>Residential/ DIY small-scale, merchant routes</b>		DIY users		
<b>End users</b>	All end users for different concrete/cement applications in use		Very large list – office workers, road users, residential dwellers etc	
<b>STAGE 5 – END-OF-LIFE</b>	<b>Demolition firms</b>		DSM Demolition Ltd, CDC Demolition Ltd,	
	<b>Clients</b>		Building Developers Highways Agency etc	
	<b>Waste Companies</b>		SITA, BIFFA, Shanks, Cleanaway	
	<b>Landfill Operators</b>		Brett Waste management, Shanks	
	<b>Trade Bodies</b>		Environmental Services Association (ESA), WRAP (AGGregain), British Aggregates Association, CIWM, Construction Industry Council (SD C'ttee), National Federation of Demolition Contractors (NFDC)	
<b>WHOLE LIFECYCLE</b>				
	<i>Political</i>	<b>National Regulators</b>	<b>Environmental regulators</b>	EA, SEPA
		<b>Industry Regulators</b>		DTI
		<b>Health and Safety Regulators</b>		HSE
	<b>International</b>	<b>European Union</b>		DG Environment and DG Enterprise, DG Health and Consumer Protection, European Parliament incl MEPS
	<b>Government</b>	<b>National Government</b>		DTI, OGC, DEFRA, ODPM
		<b>Regional Government</b>		RDAs

		<b>Local Government</b> – Planning, regulation & as construction clients	Cement supply chain related LA's (including raw material/ aggregate quarrying, cement & concrete manufacture, recycling/ disposal sites)
<i>Third party groups</i>	<b>Pressure Groups</b>		Greenpeace, Friends of the Earth, WWF, ENCAMS, English Nature, National Trust, National Society for Clean Air & Environmental Protection
	<b>Advisory Bodies, Consultancies</b>		WRAP, Envirowise, Civil Engineers and Auditors, Building Research Establishment Ltd (BRE), Institutue of Economic Affairs Environment Unit, European Science and Environment Forum, NISP
	<b>Investors</b>	Institutional Investors, Pension Funds, SRI funds	
		Mainstream investors	
	<b>Insurers</b>		
	<b>Trade Unions</b>		
	<b>Trade bodies, Business associations</b>		CBI, WBCSD, ICC, Construction Products Association, Environmental Industries Association, ESA
<b>Professional Associations</b>	Construction, Engineering, Waste, Environmental professional associations	ICE, CIWM,	
<i>Research Institutions</i>	<b>Private institutions</b>		CIRIA, BRE
	<b>Academic Institutions</b>		University of Dundee, Nottingham, Sheffield, Loughborough University,
<i>Media</i>	<b>National media</b>	<b>General</b>	BBC, Times, Guardian, Economist, Financial Times
		<b>Environmental/ Sustainability</b>	Ecologist, Green Futures, Ethical Corporation, Greenpeace Business, ENDS etc
	<b>Local &amp; Regional media</b>		
	<b>Trade media</b>		Contract Journal, Construction News, Building, New Civil Engineer, ICE Journal

## 5 – ISSUES MATRIX

The issues matrix has been designed to offer a quick means to identify stakeholder concerns across a range of issues, or to identify which stakeholders are interested in a particular issue. However, this is a simplified analysis and some caveats should be mentioned:

1. The issues identification is based on secondary source material and is not developed in consultation with relevant groups. Best practice recommends that stakeholders are invited to discuss the issues of concern to them and second guessing motivations and interests may not necessarily be an accurate reflection of stakeholder views.
2. The matrix is designed to reveal *interest* rather than detail a particular negative or positive position on a particular issue. Similarly, identifying degree of interest in a particular issue should also not be regarded as a given. There is little quantitative questioning to back this up and secondary data available primarily through the reputation audit has been used where possible.
3. The list of issues used is mainly limited to environmental concerns that have been identified as a result of previous research. There may be a wide range of issues, particularly relating to economic and social factors that have not been captured here.
4. The categorisation of stakeholders into 5 groups does not capture all stakeholder views but is done to ensure analytical convenience. This grouping is based on an outline stakeholder map constructed by David Collins and others at the BCA.

This issues matrix only maps stage 1 & 2 of the cement life cycle																			
Stakeholders	Issues	Natural resource use	Energy use	Chemical use	Waste	Carbon Emissions	LAP Emissions	Alternative Fuels	Alternative raw materials	Dust	Visual Impact (quarries & plants)	Noise	Transport	Community Involvement	Landtake / Biodiversity	Quarrying impacts	Health & safety	Sustainability	Stakeholder engagement & transparency
		<b>LOCAL</b>	Local communities																
Local pressure groups																			
Local & regional media																			
Local Authorities																			
<b>REGULATORS</b>	Environment Agency																		
	HSE																		
	Planning Agencies																		
<b>INDUSTRY</b>	Suppliers																		
	Trade bodies																		
	Consultants & designers																		
	Investors																		
	Employees & Unions																		
	Customers - retail																		
	Customers - industrial																		
<b>POLITICAL</b>	DEFRA																		
	DTI																		
	National Govt (incl ODPM)																		
	RDAs																		
	EU																		
<b>PUBLIC</b>	National pressure groups																		
	Academics																		
	National media																		
	Public																		

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Key	Minimal interest	Some interest	Significant interest
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This issues matrix only maps stage 3, 4, 5 of the cement life cycle																
Stakeholders	Issues	Natural resource use - aggregates etc	Energy use	Chemical use	Waste	Carbon Emissions	Noise	Dust	Water use	Alternative raw materials	Recycled aggregates	Community Involvement	Transport	Sustainability	Health & safety	Stakeholder engagement
	<b>LOCAL</b>	Local communities														
	Local pressure groups															
	Local & regional media															
	Local Authorities															
<b>REGULATORS</b>	Environment Agency															
	HSE															
	Planning Agencies															
<b>INDUSTRY</b>	Suppliers															
	Trade bodies															
	Consultants & designers															
	Investors															
	Employees & Unions															
	Customers - retail															
	Customers – industrial															
<b>POLITICAL</b>	DEFRA															
	DTI															
	National Government (incl ODPM)															
	RDAs															
	EU															
<b>PUBLIC</b>	National pressure groups															
	Academics															
	National media															
	Public															

Key	Minimal interest	Some interest	Significant interest
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## 6 STAKEHOLDER PRIORITISATION

Martin Casey and Alistair Gale, representing BCA, conducted a stakeholder prioritisation exercise where different stakeholder groups were placed on a matrix according to their ***influence*** over the UK cement industry and their ***impact*** on sustainability & cement issues.

The results of the stakeholder prioritisation are shown in the matrix on the next page. Appropriate individuals to represent key stakeholder groups will be identified and then be invited to participate in the stakeholder roundtables in July and September 2005. Additional stakeholders not in the key stakeholder category may also be invited – for instance academic representatives or national pressure groups like Greenpeace or Friends of the earth.

This list is currently being populated and should be completed shortly.

# Stakeholder Prioritisation Matrix

