

Partnering for the Future: Imperative and Opportunity



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IQA-CCAA CMIC Conference
12 October 2006



Our industry is fundamental to Australia's sustainable growth



Industry Challenges

- Onerous and poorly coordinated planning approvals
- Environmental pressures
- Community and urbanisation issues
- The rising cost of fuel and energy
- Infrastructure bottlenecks
- A tightening labour market
- Changing standards and customer requirements

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Partnering for the Future with...

- Our **customers** and **suppliers**,
- Local, state and federal **governments**,
- The **communities** in which we operate,
- Our **employees**, learning institutions, labour providers and unions, and
- **International bodies** to ensure Australia's competitiveness.

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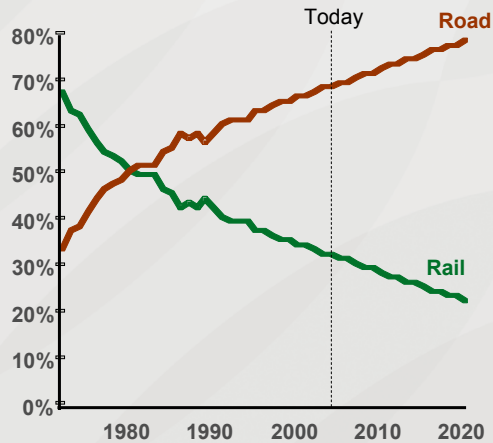
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Thirty years ago, rail had 70% share, road 30% share – today the reverse is true

MODAL SHARES by net tonne kilometres



Source: BTRE staff paper, Predicting Traffic Growth in Australian Cities 2004

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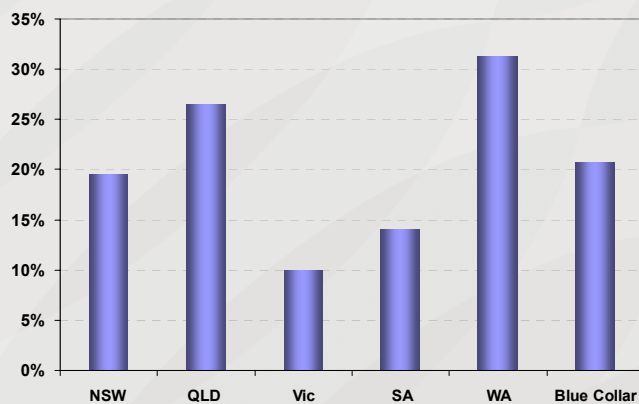
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High turnover rates for front line employees is a particular concern in the resource driven regions of WA and Qld

**Boral Australian Construction Materials
Blue Collar Turnover by Category/Region - 2005**



Source: Boral ACM

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Changing standards and customer requirements



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Partnering for the Future is about...

- a **mutual understanding** of what is needed,
- **shared goals for the efficient growth** of our industry and of Australia,
- delivering **better outcomes for our customers**, our **shareholders** and all of our **stakeholders**.

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