

Spoilt for choice?

When it comes to self propelled aerial work platforms the vast majority are employed in a wide variety of applications related to the construction industry. While this sector is likely to continue to dominate the market - regardless of any economic downturn - we can expect more of a balance to come into the market as more industrial facilities appreciate the benefits of powered access.

The underlying potential of the industrial market is huge and will benefit both manufacturers and rental companies alike, not to mention industry itself, which could and should be exploiting the productivity and safety gains that powered access can offer. Manufacturers and rental providers tend to make an effort to exploit the industrial or 'end user' market any time the construction industry goes through a downturn and yet the industrial market still remains largely untapped. Why is this?

There is some validity to the argument that its time has not yet come. Certainly this has been true in the past, but the biggest single reason for the poor penetration and uptake is the fact that it is a very fragmented market where decision making can be very slow. As such it is hard and expensive to cover from a sales point of view and access salesmen - whether rental or dealer - tend to focus on the 'easier' construction and rental buyers where buying power is more concentrated and decisions are made more rapidly.

There is also a notion among many plant maintenance managers that powered access is too expensive and an unnecessary luxury. The fact is that most industrial facilities already have some form of access, usually large A-frame type step ladders, rolling steps or possibly a small scaffold. If all that fails there is always the forklift and pallet if someone is keen on using powered access! A major issue is also the intermittent and short term nature of

the work at height requirements at many plants. If something high up needs to be reached it is so easy just to grab a ladder or borrow the forklift for a half hour. The idea of sourcing the proper equipment is just too much hassle. We know from our Death Wish series on Vertikal.Net that even companies located right next door to an aerial lift specialist will 'make do' with some horrific methods of reaching the work, rather than make the effort to get the right equipment.

We also know from the statistics produced by national organisations such as the UK's Health & Safety Executive (HSE) that most working at height accidents result from the lack of any form of planning. The trouble is that for every 100 times employees use makeshift work at height methods, in more than 98 cases they are likely to succeed or get away with it. However unlike many situations where the odd failure might result in a nasty cut, a graze or stiff back, a fall - even from relatively low levels - can and does result in death or permanent disability. Production will be shut down while an investigation ensues and those who witnessed the accident first hand will be severely traumatised, while the cost - the least traumatic of the after-effects - can easily run into six figures and destroy a business.

Thankfully much is changing and the better plants are beginning to plan any work at height they may have. This is not a difficult thing to do and best done when there is not an immediate need or pressure to source some access equipment.



The cross supply agreement between Manitou and Genie means that Genie can now offer two mast booms - the 5.7 metre GR-20J and this 7.9 metre GR-26J



The articulated boom gives more outreach



MEC 1932ES

Most access equipment suppliers - whether a sales or rental company - will be happy to carry out a full survey of your requirements and quote for any solutions. Do though make sure that you contact several suppliers, as the range of available

equipment is now massive and there is almost always more than one way to reach the work. The most efficient solution might also involve a combination of purchasing/leasing and short term rental, for instance buying a lift or tower for the majority



Rental companies have a selection of lifts - make sure you choose the right one for the application



The Bravi Leonardo offers a good platform size and low weight



Haulotte's new HA12CJ



The easy to operate Skyjack SJ16

of the work and renting in a larger or more specialised piece of equipment for a specific job. When industrial companies do consider safer and more efficient access equipment for the first time they all too often go straight to self

propelled boom or scissor lifts. However there is now a massive range of options to consider and for both efficiency and cost reasons you will do well to take the time to learn as much as you can, before making any long term commitments.

For those of you considering powered access for the first time – particularly in readiness for any plant shutdown work - we take a look at the different types of 'everyday' equipment at the smaller end of the working height range.

Some of the options

The push around scissor lift is a relatively new product sector and offers working heights of up to around five metres making them well suited to many routine 'work at height' duties within a large number of production facilities. Their simplicity, low weight and most importantly low cost will of course be attractive. Users with some experience of powered access and with more regular demand may well prefer the self propelled versions of this size of lift, such as the Nano from Power Tower, and Pop-Up's new 'Drive' range, or ultra low weight self propelled lifts such as Custom Equipment's 8ft platform height - S830 or the 10ft S1030 - or the granddaddy of them all the Bravi Leonardo and its new stock picking cousin the Caddy. These low level units offer light weight, simple construction and easy operation. They can also be used both in the plant and in the office or showroom areas. And if you have some work outside the plant the Leonardo is now available as a slightly heavier outdoor version.

Manufacturers continue to enter this market, the latest being Alarina from Almeria in Southern Spain with two models – the 4.2 metre working height Alas 2100 and the 7.14 metre Alas 5100. The smaller unit is able to drive up a ramp into the back of a van for easy transportation. Weighing 380kg, the Alas 2100 measures 640mm wide by 1.8 metres high and has a 120kg lift capacity. The larger model has a very good working height and 240kg platform capacity but measures just over two metres high, is a metre wide and weighs just over a tonne.

For intermittent users who just don't want to deal with batteries, electrics or hydraulics the recently launched Power Scissor 500 might be just the thing. Designed and built in the UK it is available from Russon Access Platforms of Stourbridge in the UK. It is certainly a case of less is more, with a five metre working height and 120kg capacity, the lift is rated for both indoor and outdoor

use (if fitted with the optional stabilisers). More unusual is the fact that platform elevation is achieved via a manual wind-up handle helped by pneumatic springs which provide the first 65kg of platform lift. This means that the unit is maintenance free, has zero emissions and zero carbon foot print allowing it to be used in sensitive work environments such as offshore, petrochemical or food industries. Its simplicity is already attracting a lot of attention from a major oil company. Elevation can also be achieved using an electric hand drill in place of the hand crank, if the environment allows or an air drill in more sensitive areas. Manufactured in Kings Lynn, the company is in the process of introducing a slightly larger version - the Power Scissor 600. The company also makes the Powerstep 2000 a four metre working height 150kg capacity, spring-assisted telescopic step platform that again can be used in any environment. Certainly, the larger powered 'push arounds' are now offering slightly lower and lighter alternatives to the more established mast-type self propelled platforms such as the UpRight/Snorkel TM12, JLG ES1230, Genie Runabout and Haulotte Star 6 which are now joined by new Skyjack SJ12 and range topping SJ16.

While these mast type platforms offer more working height and basket capacity, they are of course heavier and naturally more expensive, meaning that there may be issues when used on load sensitive suspended floors and also when moving the units between floors using passenger or goods hoists. One platform that has carved out a substantial niche and now sits between the push around's and the mast type platforms or micro scissors, is the Bravi Leonardo although it offers slightly less working height at 4.9 metres compared to the 5.7 metres of the TM12 sector. However its slimmer centrally mounted mast design gives it benefits such as reduced weight at 495kg and longer platform at 1.7 metres. The TM12 weighs 776kg and offers a deck of just over a metre long, but it does provide almost a metre more height and more than 40kg more lift capacity – so it really depends on your needs and of course the deal you can do.

	Bravi Leonardo	Pop Up Drive 10	Genie GR12	JLG ES1230	Snorkel TM12	Skyjack SJ12	Haulotte Star 6
Working height	4.9m	5.0m	5.48m	5.66m	5.7m	5.48m	6.0m
Capacity	180kg	225kg	227kg	227kg	227kg	227kg	180kg
Weight	495kg	544kg	717kg	790kg	776kg	766kg	800kg
Width	790mm	760mm	750mm	760mm	760mm	760mm	760mm
Height stowed	1.69m	1.80m	1.57m	1.66m	1.70m	1.66m	1.65m
Length	1,215mm	1,200mm	1,350mm	1,360mm	1,360mm	1,370mm	1,500mm
Max platform length	1,700mm		1,400mm	1,250mm	1,040mm	970mm+	800mm
Drive speed stowed	3 km/hr	4.0km/hr	2.5km/hr	4.8km/hr	3.65km/hr	4.8km/hr	5.0km/hr
Gradeability	35%		30%	25%	25%	30%	22%

+ The Skyjack as a sliding or traversing deck providing some outreach but not increasing platform size.

Mast booms?

A mast boom is an aerial lift that uses a superstructure mounted mast to obtain its vertical height, but then features a jib or small boom on top. The superstructure should ideally be capable of slewing through at least 180 degrees in order to provide decent outreach to the side. The platforms in the table above are not mast booms – they are fixed mast platforms - no slew, no jibs - and are generally viewed as the equivalent of small scissor lifts in that they perform in an identical manner.

The mast boom has been around for more than 20 years and yet it remains a niche product, despite being the platform of choice for many industrial and construction applications – particularly in France where the concept originated and where it is easy to rent, lease or buy. There are now a good selection of manufacturers – ATN, Haulotte, JLG, Manitou and UpRight – and the cross-supply agreement between Manitou and Genie announced at Bauma, means that Genie also has two models of its own (Manitou-built) – the 5.7 metre GR-20J and 7.9 metre GR-26J.

The larger mast booms not only give users a useful working height of between 10 and 12 metres from a very compact base, but also give an ‘up and over’ capability and a useful working outreach of up four metres – perfect for use as an all-round industrial platform. Unfortunately in the UK, most rental companies have not yet fully appreciated the benefits (or had enough demand) to purchase these platforms in significant numbers so you may have to search a bit to find one available locally.

Should more outreach be required the compact articulated boom is, of course ideal. Most manufacturers offer at least one machine in this sector - Nifty, JLG, Genie, Haulotte,

Iteco and UpRight – but there have been some interesting developments.

ATN – primarily a mast boom manufacturer - launched its first articulated boom, the Zebra 12 last year. The 230kg capacity, 12.2 metre working height Rough Terrain boom and has a single riser, two section telescopic boom and articulating jib. However its most impressive feature is its 8.5 metres of outreach which can compete with most 50ft articulated booms. While this is the first machine of its type produced by ATN the company has a very solid source of technical input from its largest single customer, rental company Access Industrie. The machine would be a good choice for someone looking for a machine with greater outreach than say a Genie 45 in a more compact and lower weight package. Two larger models - 16 and 18 or 20 metre - are said to be on the cards. Several companies also produce extra compact electric industrial booms, including JLG, Genie, Iteco and Haulotte.

Most recently, Haulotte has unveiled its new 12 metre narrow aisle electric boom. The HA12CJ - and the CJ+ when fitted with a rotating jib – has several features that make it ideal for industrial applications. Like its main competitors – the completely revamped JLG E300AJ and AJP and the Genie Z30/20N – the Haulotte uses two short risers to ensure zero tail-swing with a reasonable up and over reach, a two section telescopic boom and 140 degree articulating jib with optional 180 degrees of lateral rotation.

However it also offers 600mm more height, around 300mm more outreach (at almost seven metres) and about 800mm more up and over reach – all in a 1.2 metre wide package. Overall height is 1.99 metres allowing it to pass through most doorways.



JLG 1230ES



Custom Hy-brid HB1030CE



Snorkel TM12



UpRight MB20N



Haulotte Star 10



ATN Piaf 1000R



JLG LiftPod



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How the 'mast boom' platforms compare?

	Haulotte HA12CJ+	JLG E300AJP	Genie Z30/20N	ATN Zebra 12
Working height	11.7m	11.14m	11.14m	12.20m
Lift capacity	230kg	227kg	227kg	230kg
Outreach	7.22m	6.25m	6.53m	8.50m
Length	5.64m	5.49m	5.11m	4.50m
Width	1.20m	1.22m	1.19m	1.94m
Height stowed	1.99m	2.0m	2.0m	
Up and over clearance	4.74m	3.99m	3.86m	4.00m
Platform rotation	180°	180°	180°	180°
Jib rotation	140°	144°	139°	none
Weight	7.04t	7.17t	6.43t	5.15t

Micro scissor lifts

Compared to the other platforms already covered, the small battery electric scissor lift is by far and away the most popular powered access platforms in use today. In 19ft platform height form, they can pass through standard doorways and fit into passenger elevators (although they have gained a huge amount of middle aged flab since they were first launched – so are no longer suited to lifts of under 1,500kg) making them ideal for a wide range of applications from internal installation work to refurbishment, cleaning and industrial maintenance. This type of access platform rapidly gained in popularity when it was launched in 1994, thanks to its compact dimensions, decent working height and light weight - not to mention attractive price. Continual refinements and mass production has meant that the purchase price has decreased over the years – although not to the same degree as rental rates which at times make these units less expensive to rent than a scaffold tower of the same height - so they are one of the most cost-effective platforms on the market when looking at the working height and features.

Take for example the original elevator lift - the UpRight MX19 or the direct electric drive JLG 1930ES – both offer a 227kg lift capacity with a working height of 7.8 metres and compared to the smaller units we have looked at or mast booms, a huge - up to 2.54 metres long - extended platform. While compact compared to the larger scissors it is nothing like as compact as the mast machines or push arounds, let alone the Leonardo, and don't mention the

weight if you have floor loading issues, although most industrial plants are designed to support fork lifts so at around 1,500kg these machines are featherweights.

So as you can see – the array of small platforms is enormous and unless you do some basic research it is very easy to specify the wrong machine or take a machine 'recommended' by a local hirer because he has a yard full of them.

Some companies may opt to buy a machine - and £10,000 should be more than enough to buy the most expensive scissor lift (under six metres) while the smaller powered push around lifts will set you back around £3-4,000). Renting as and when you need it is also a good alternative but as we have already outlined, planning is the key to working at height and obtaining and using the right equipment. It will also be more expensive if a machine is needed on a fairly regular basis. The final option is leasing which means a platform is always available to use, monthly lease costs can be surprisingly low and in tight financial times it does not tie up capital.

Which ever platform you use, you may be surprised how much more efficiently working at height tasks are completed as well as reducing the risk of having a work at height accident.



Iteco's new compact electric industrial boom



The Power Tower at St Pancras Station



Vertical Days saw the introduction of the Power Scissor 500



ATN Zebra 12



JLG Toucan 12



A Nifty HR15



JLG E300AJ



Snorkel Drive10



Alarina's new Alas 2100



A-SERIES Articulating Booms



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Paul Kelly the recently appointed managing director of Harsco Infrastructure Europe, used Bauma to explain Harsco's vision for its \$3 billion infrastructure division which merges the scaffolding, access and formwork business of Hünnebeck and SGB in Europe with Patent in North America. However, the man in charge of rationalising and reorganising the company's equipment is operations director Cameron Reid. We spent a few hours with Reid and heard about his plans.

Although relatively young, Cameron Reid has been in the equipment and more specifically, mastclimber business, since he left college almost 15 years ago, working with father Andrew Reid and the company he formed in the early 1990's, Mastclimbers Ltd. Continual promotion and growing interest in the product resulted in rapid expansion and by 2001 the company had two depots - one in Glasgow run by Andrew and the other in Leighton Buzzard run by Cameron.

The Reid's connection with SGB/Harsco also began that year when Mastclimbers and SGB (then recently acquired by Harsco) merged their mastclimber businesses, forming a joint venture aimed at developing and growing the business in the UK. SGB held the majority 51 percent share and exercised a three year buy-out option in 2004, acquiring the Reid 49 percent

holding. At this point Andrew retired and Cameron continued with SGB/Harsco which by that time controlled around 70 percent of the UK and Ireland mastclimber business.

"The current downturn is the first I have experienced since starting in the business in 1995," said Reid. "The core principal in growing the mastclimber business was safety. In the early years we worked with the CITB and then IPAF, becoming very involved with BS7981 and 'The safe use and maintenance of mastclimbing work



Cameron Reid



Paul Kelly



Partnering Pan-European contractors is one aim



Harsco has around 2,000 MEWP's



Mast climbers on a multi-storey building in Doha, Qatar



Working at Earls Court tube station in London

platforms'. With one of the world's largest fleets we were able to influence this so that it was specific to the industry with a design standard, code of practice and set of robust training criteria. As we develop Harsco Infrastructure it is as important to maintain safety standards – safety is paramount in everything we do."

Within SGB, Reid has worked in scaffolding, major project services as well as running the separate mastclimber business in Glasgow, Scotland, moving south to Harsco's

Leatherhead head-office as operations director in charge of all mechanical services.

Kelly's appointment earlier this year, was part of a plan to restructure the business to be more effective and sustainable, reviewing all European operations. Reid was appointed business development director in the 'Euro' area with a brief to help each business develop the full Harsco portfolio. Germany appears to be his main area of concentration, at least initially.



A temporary roof structure at Milford Haven



Scaffolding on the Forth Rail Bridge



Powered access in Highbury, London

"Germany is very much a product driven business and we have no mastclimbing or powered access operations nor the capability of supporting our contracts with these products," says Reid. "We do not even offer a scaffold erection or dismantling service. In my opinion Germany is the industrial heartland of Europe but it could take 10 years to fully develop the mechanical services division."

Reid is also helping development in the existing businesses in Scandinavia and Holland and sees an opportunity to using the existing framework in Holland, which is a significant player in the Dutch powered access market as a stepping stone to develop the German business.

The vision outlined by Kelly includes a redistribution of the existing powered access fleet, so why was SGB UK's powered access fleet sold if other countries are highlighted for an expansion in this area?

"The strategy of the business has changed since the decision to sell the UK fleet," explains Reid. "We are in a different market today and we have to be smarter in the way we take our services to market. Individual markets may have been performing well but did not fit into the strategy. The future is more customer driven and customer focussed. We do not want to be all

things to all men but need to concentrate on two main markets – industrial and construction. In industrial we want to work with the clients or principal contractors, in construction we want to partner the true pan-European contractors, allowing clients to deal with one account manager who has the full range of group services available. In the past the business was structured by country with individual management and objectives and no common approach or strategy. This meant that there were times when the mastclimbers were openly competing with the scaffolding division as well as trading with them. My biggest customer in 2006 for mastclimbers was SGB – how daft is that? We should have been developing a single strategy to meet customers' needs and that is how we will develop the new strategy."

"We are looking at how best to utilise the assets at our disposal and identify the opportunities. This will become clearer as we firm up more service agreements with customers. The UK powered access fleet was just not producing a good enough return for various reasons. However if there are a number of contracts that need powered access then we will find those machines, either from other parts of the business where they are not being utilised or by investing in new equipment. All

European powered access inventory is now part of one fleet and success will be judged on how profitable it is." "Companies have focussed on utilisation rather than actual returns on investment. I have even heard of companies in London supplying scaffolding free of charge, purely because they haven't got the space to store the equipment because the lack of work. They do get a return on the labour which allows them to retain staff and avoid redundancies."

"Harsco is not a pure rental business – so return on investment is key. The going rental rate for an electric scissor may be x hundred Euros a week, but we do not price a contract that way. We work out the cost of the product but more importantly, the cost to the business, its overhead to the business and the margin we are looking for – the cost plus pricing model equals our product offering to the customer. You just cannot price a three year petrochemical maintenance contract which may have hundreds of items of equipment on a weekly rental rate."

Future investment?

"The three main 'mechanical access' categories within Harsco include MEWPS - electrical and diesel scissors, booms, industrial lifts; MCWP – mastclimbing work platforms and SAP - suspended access platforms (cradles/ swingstage) and other winch type products. There is a need for the company to establish strategic partnerships with manufacturers on a European and in some cases world-wide basis, not just for the supply of products, but in order to work with us to provide our customers with the right products, training and business development support, particularly for less mature markets than for example the UK and Holland."

"I am currently speaking to numerous suppliers with this in mind. Developing emerging markets such as Russia, Ukraine, Hungary and Slovakia is very different to developing in France or the UK. We need to be smart in how we procure products and services. We need partners that can handle both extremes. The majority of the equipment suppliers will already have a strategy for emerging markets – perhaps through used equipment."

In spite of the disposal of the UK powered access fleet, Harsco still has a surprising amount of equipment. "We have about 2,000

mastclimbers, rack and pinion hoists, transport platforms and materials hoists etc... as well as around 2,000 MEWPS - quite a reasonable sized fleet but a drop in the ocean in relation to our corporate growth objectives." says Reid. "Investment is driven by customer demand so there are no firm plans but Paul Kelly and I are talking to key suppliers. Equipment numbers are now stable and most of the fleet has now been reallocated in accordance with the new strategy."

"I want to establish a core range of equipment which would not include the unusual. At the moment, we wouldn't look at spider cranes for example but with a large industrial fleet we would consider spider lifts. We already have niche industrial products such as JLG's Toucan and in the UK a fleet of Pop-Up push-arounds on projects such as the London Olympics. So I am looking at existing suppliers first who get our strategy and have products that fit."

In some areas there will be rationalisation. "We have 16 different makes of mastclimber in the UK alone. I am not saying how many we will end up with but we are looking at simplifying things towards light, medium and heavyweight product ranges, supplied by whoever can meet those requirements. The product to me is secondary as without the demand there is no business. We need to spend more time with colleagues around Europe to raise competency levels and identify core customers. In the meantime I will be developing a portfolio of products that will meet customer demands and invest as and when contracts require it."

Harsco Infrastructure revenues were \$1.2bn last year 60 percent of which came from its European operations. However its presence has grown enormously from operations in just three countries in 2000 to 43 currently and a predicted 50 countries by next year.

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