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STRATEGIC DIRECTIONS

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STRATEGIC DIRECTIONS FOR THE WMAA

STRATEGIC DIRECTIONS – A SUMMARY

The Strategic Directions for the Waste Management Association of Australia lie in five areas:

- A. Technology;
- B. People & Skills;
- C. Profile;
- D. Membership & Participation; and
- E. Communication & Knowledge;

and emerge from the key actions and roles that we can play in the changing complexion of our industry and markets. The key actions listed below represent opportunity areas for the Association. They are directions that we can pursue in support of our Members and initiatives that we can incorporate into our planning for events, publications and major activities.

A TECHNOLOGY

- Keep abreast of emerging technologies

B PEOPLE & SKILLS

- Promote waste management competency standards
- Develop industry training program – licence material
- Promote Australian waste management training into Asian countries
- Incorporate training courses with conferences

C PROFILE

- Build-up our profile Trade Exhibitions and Conferences
- Facilitate national linkages with relevant industry associations
- Facilitate a national presence for waste management
- Build up profile in ISWA
- Maintain contribution to Inside Waste Management Association of Australia
- Establish WMAA representatives government advisory groups and committees
- Strengthen links with ISWA and information exchange

D MEMBERSHIP & PARTICIPATION

- Develop strong links with tertiary institutions and build up involvement with tertiary students in WMAA activities
- Encourage professional development of young professionals in the Association
- Engage a wide spectrum of stakeholders
- Develop links with waste generators' industry associations to encourage responsible waste and resource management
- Build up our Corporate Membership and Divisions

E COMMUNICATION & KNOWLEDGE

- Extend our waste management knowledge base
- Encourage and foster integrated resource management
- Establish and foster an industry role in extended product responsibility initiatives
- Build on our existing methods for information management
- Present issues papers that reflect diversity of views

STRATEGIC DIRECTIONS FOR THE WMAA

1. INTENT & PURPOSE

This discussion document sets out our forward path for development. It encapsulates input from an Association-wide consultation and establishes a set of guiding strategic directions which the National Committee, Branch Committees, Division Committees and the Association as a whole, will follow in the implementation of future programs and initiatives.

A brief assessment of the drivers for change that are impacting on the waste management industry is presented, along with the outcomes that those drivers might produce. This leads to the opportunities and roles that the Association could address and concludes with an assessment of the strategic directions and the key initiatives that the Association will pursue into the future.

This document is a set of guiding strategic directions that Members of the Association will use – it is not a strategic plan for the Association.

2. BACKGROUND

The Waste Management Association of Australia has been in existence since 1990. The Association was formed by a group of industry members who recognised the requirement for a body that would look after the needs of the individuals of the waste management industry, and in so doing promote the interests and position of the industry itself.

By 2001 we have Branches in every state and we have a financial position of satisfactory stability. The WMAA has formed Divisions or special interest groups in a number of key industry sectors and our Branches and Divisions enjoy a good level of operational and financial autonomy.

From its inception, the WMAA has had strong links with the Australian Water Association (AWA – formerly AWWA) and our joint biennial Convention has been a major underpinning element of our current financial position. The relationship with AWA is growing from strength to strength and with the formation of the Environmental Forum - a collaboration between key associations covering air, water, and waste plus Environment Business Australia - the WMAA will be seen as one of the major players in environment management in Australia.

Over the years our membership has grown to encompass all discipline and interest areas in waste management, and we comprehensively cover individuals in both the public and private sectors. Our services to Members have matured and we now deliver a quality newsletter, facilitate conferences, workshops and seminars across the country, and we have been pro-active in the development of

competency standards for the waste management industry. In addition, the WMAA now provides an Internet based communication system for our Members, which will take us well into the next generation of Member services and communications.

In 1997 the Association determined to join the international waste management community, and in 2003 we will host the International Solid Waste Association (ISWA) Congress and Annual Conference in Melbourne.

The WMAA has reached a level of maturity, which provides an exciting platform for growth and development. It is now timely for the Association to take stock of the forces which created the WMAA and which are shaping the environment into which we and our industry will grow. Through an analysis of these drivers it will be possible to identify pathways that we can choose in determining our future.

3. THE CURRENT SITUATION

The formalised management of wastes in our communities started as an essential service for the purposes of sanitation and public health. Whilst health and sanitation remain important criteria today, the main drivers of this industry have changed. Underlying the present and future demands on the industry will be rapid expansion in urban populations and the associated resources consumption by those populations. There is clear evidence that the current rate of consumption of resources is not sustainable and means must be found to reduce this pressure on the ecosystem.

The forces that will shape our industry in the immediate and near term future are briefly discussed below under the headings of environment, society and economy. While this discussion relates primarily to Australia, similar circumstances pertain in other countries, and the needs and opportunities are perhaps even greater in many neighbouring Pacific Rim countries.

3.1 Environment

The key drivers in this sector are the rate of resource consumption, and the impacts on the environment of waste management - collection, processing and disposal.

Resources - traditionally resource consumption has been linked with economic growth, and the conservative view has been that if we reduce consumption then we will have a negative impact on economic performance. This position is now known to be incorrect, and it is widely recognised that the target with respect to resources lies in the efficiency of resource utilisation. To achieve growth and reduced consumption of resources we need to "do more with less". This is the clear message of several international initiatives being promoted under the titles of Factor IV - doubling wealth and halving resources consumed - and Factor X - a ten-fold increase in resource utilisation efficiency. It is an underlying tenet of

eco-efficiency principles being promoted by the World Business Council for Sustainable Development, and it is the foundation of the cleaner production programs that are now common place around Australia.

Thus there is an increasing trend and on-going pressure to manage our resources better, before, during and after production, and after consumption.

Waste Management - the majority of waste management activities have significant potential to impact on the environment from the collection phase through processing and on to disposal of residuals. These environmental impacts have been the reason for increasingly stringent performance regulations on waste management activities and historically have been the reason for the relatively poor reputation of the industry in the eyes of both regulators and community.

In addition to traditional areas of environmental concern - odour, noise, traffic, leachate, ground contamination, etc. - concerns with greenhouse gases will mount. International conventions and commitments, mirrored by domestic regulations within Australian jurisdictions will drive many of the environmental pressures that we will have in the future.

Conventional waste collection, transport and disposal services will remain an essential part of the services and skills required of the industry, but with an increasing demand for higher standards of performance. In parallel with these traditional skills and services, new technologies, services and practices will be demanded and emerge into our markets. The mix of traditional and emerging technologies and services must be managed, and there will be growing pressure for the delivery of integrated waste management solutions.

With waste reduction initiatives and higher levels of resource recovery, the nature of residuals for disposal will change continuously. This will require matching changes in the technologies and processes employed to manage those residuals. The pressures on handling facilities will increase rather than decrease and the industry will be called upon for increasing levels of sophistication and high performance outcomes.

3.2 Society

The key drivers in this sector are population growth, perceived impacts of waste management activities, growing awareness of right to know, and wide spread introduction of extended product responsibility initiatives. In a number of these areas the situation in Australia parallels that in other developed economies.

Population - whilst Australia is not classified as a major population growth centre of the world, we can expect continuing growth in specific regions, continued immigration, and continued urban population density growth. In world scale terms these are not significant, but within regions of Australia they will accelerate

the prosperity of the country and will increase the pressures for improved resource management initiatives in high-density areas.

Perceived Impacts - community demands for improved local amenity have heightened concerns about the location of many industrial facilities relative to living and recreational areas. Waste management facilities have been foremost in this target group, based primarily on historical performances. It is no longer sufficient to have "the safest and best" technology and system. It is now essential to have strong community support for proposed systems and facilities.

Right to Know - the demands for community participation in planning and siting of facilities are coupled with a growing acceptance of right to know privileges on the part of the community. Companies interfacing with the community must make available all relevant information must implement transparent processes and move to work in an inclusive fashion with their stakeholder communities.

Product Stewardship - industry is also responding to community pressures and companies and industry sectors are progressively taking up the principles of extended product responsibility or product stewardship. Suppliers will be called upon to improve their services and products, and consumers will be required to participate in the recovery of products. Many of these activities will lie outside of the core business areas for the product manufacturers and many of the activities will overlap with current functions and activities of the waste management sector. There will be a growing need for service providers to address resource management from pre-manufacture through reintroduction of the resources into the productive economy after each use.

3.3 Economy

The key drivers in this sector are moves towards smaller government, higher disposal costs, and financial tools of regulation.

Smaller Government - as governments retreat to the provision of the core services of government, there will be greater demand for private capital and private involvement in the delivery of utility services. There has already been a significant withdrawal of local government from the direct provision of waste management services. With amalgamation of councils and the formation of regions, which transcend local government boundaries, this process will continue.

In the provision of infrastructure such as transfer stations, materials recovery facilities, processing plants and landfills, progressively governments are commissioning private sector capital to finance and operate these facilities, and requiring higher levels of planning, community relations management and overall facility management on the part of the private sector.

Disposal Costs - for waste generators, the cost of waste disposal is increasing at a rate which is significantly faster than the underlying inflation factor, and this is not expected to slow in the foreseeable future. Pressures on disposal costs

arise from more stringent regulation on the handling and management of wastes and through levies imposed by government as a disincentive to waste generators. As the cost of waste disposal increases waste volumes should diminish and processing or disposal options should increase. At the same time, the financial hurdles for new and emerging technologies will fall and rapid, innovative response will be required to capture opportunities.

Regulatory Instruments - to encourage greater reductions in waste volumes, governments are using a mix of regulatory instruments which collectively increase the economic pressures on waste generators, and in turn inject more funds into the waste management industry.

The imposition of bans on landfilling of nominated wastes stimulates market demands for alternative processing and disposal options. Equally, levies on disposal create financial "back-pressure" on generators and stimulate additional funds into the market.

The use of tradable rights is another tool of regulation which will impact on the waste management sector. In the management of greenhouse gas obligations, carbon credits will become a force for the waste sector to manage, and the possible advent of landfill disposal airspace rights could create a secondary market for rights trading.

4. OUTCOMES FROM THE SITUATION

The outcomes from the driving forces and their implications for the waste management industry are discussed below under the headings of technology, people and industry.

4.1 Technology

With increasing expectation of performance quality and growing costs of waste disposal, will come a demand for more technological sophistication from the industry. This technological demand will be targeted at improving what we already do in managing wastes, reducing costs, improving environmental outcomes and providing new methods for handling wastes and recovering resources.

Signs of this are already evident in collection systems and in landfill management. For kerbside collection, the thrust has been to achieve higher levels of efficiency, less contamination and reduced costs. Mechanisation has been a key tool in this trend. At landfills, the demands for greater environmental performance have necessitated more comprehensive management systems, and more technology in leachate and gas management. Also there are pressures to reduce costs through more efficient use of plant, smarter systems for cover and capping and maximising void utilisation.

These trends can be expected to continue at both the collection and disposal points. And there will be significant demands for new technologies in the integration of waste management activities, especially in the areas of processing and resource recovery. The additional funds that are flowing into the waste sector, plus government drives to reduce disposal options will ensure that technology demand will remain high for some time to come.

4.2 People

The thrusts of cost reduction, improved performance in existing waste management activities and more innovative and sophisticated technology, will require fewer, more highly skilled and knowledgeable people in the waste management sector. There will be requirements for more training, implementation of competencies, linking of remuneration to competencies and performance, and need for greater dissemination of knowledge across the industry.

As accreditation of waste managers becomes a requisite for operating in the industry, so the skills and training of the people will become more formalised, registered and audited. There will be higher levels of accountability and greater risks associated with errors. This trend will be heightened with the advent of greater post-consumer product stewardship. If the waste management sector plays a significant role in product life-cycle, then the skill mix of the people within the industry will change along with the accountabilities and responsibilities.

4.3 Industry Structure & Profile

The markets for the waste management industry will grow in several dimensions in response to the driving forces. There will be new market opportunities for waste management service providers in the integration of waste management activities. Technology providers will see opportunities to meet the demands of the industry and supporting service providers will see opportunities in the areas of training and technical support.

For the operators there will be opportunities to implement the new technologies associated with waste management and resource recovery, and there will be new markets created within the existing client base. As waste generators are pressured to reduce waste, and assume higher levels of responsibility for products after the consumer phase, so the tasks that must be undertaken will progressively fall outside the core business areas of the generators. The waste management industry is well positioned to fill these emerging market gaps in the area of cleaner production and post-consumer product management.

Overlying these market developments will be the growing demand for unifying views on wastes and resources management to be prepared and presented. Debate will rage at state and national levels and informed views must be inserted into this debate to ensure that the path forward is appropriate and comprehensively canvassed with accurate facts and information.

5. OPPORTUNITIES & ROLES FOR THE WMAA

The WMAA is now recognised as an integral part of the fabric of the industry, but to remain relevant and to continue to add value to the industry, it is essential for the Association to respond to the driving forces that are shaping the industry. And this response must be pro-active and ahead of the changes if we are to deliver maximum value to our Members and the industry.

In the three aspects of technology and communication, people and skills, and profile, there are several areas where the WMAA can implement actions to benefit the industry and our Members. These are briefly outlined below.

5.1 Technology & Communication

Technology Awareness - industry, government and the community need to remain abreast of emerging technologies as well as trends in current practices and technologies. These will arise in both our own markets and overseas. Within Australia the WMAA is well networked into the industry through our Members, and there is a good degree of technology awareness raising going on through the various forums that the Association convenes and manages.

This should be both widened in scope and extended in delivery. Widening our areas of technology awareness should encompass the move of the industry into areas such as cleaner production, greenhouse gas management, and sustainability associated with resource utilisation. In parallel, the extension in scope should see the Association stimulating technology awareness within government and the community.

In the international sphere the affiliation with ISWA and its Working Groups should broaden our collective networking. It will be essential for the Association to actively participate in ISWA and the Working Groups, to exchange and disseminate information and to encourage more of our Members to join ISWA and expand their individual networks and horizons.

Information Dissemination - the WMAA has an established set of communication tools through the newsletter, conferences, seminars and the web site. Our Branches and Divisions have focus areas and embedded knowledge. To increase the effectiveness of information dissemination, it is essential that the issues discussed and the management of that discussion is clearly targeted towards the relevant areas of change for the industry, and that the maximum opportunity for input and debate is facilitated.

The WMAA has a very focused Membership, which is attractive to third parties who are seeking valuable and knowledgeable input. Through effective management of this experience and knowledge-based resource, it is possible to build the extent of our communications and the standing of both the Association and the industry.

This will require dedicating resources to the management of communications, and developing mechanisms that permit the Association to contribute constructively in multiple fora of debate. The Association must recognise the various interests and factions across the industry, and the need for effective input to government and the community of leading technical information. We must manage the diversity and move to a position where we can provide effective input on diverse and, sometimes divergent, aspects of waste and resources management.

5.2 People & Skills

Competency Standards - experience with the development of competency standards has clearly demonstrated that there is a need for competency standards within the industry, and that there are parties eager to step into the gap if the Association does not fill the need. The Association has established a strong credibility with the development of the current suite of competency standards and is well positioned to play a leading role in their extension and rollout across industry.

The Industry Training Board managing the waste industry competencies has succeeded in achieving Ministerial approval for the competency standards. There is now a need to disseminate those competency standards across the industry, ensure that acceptable providers are available to the industry, and that accredited organisations are available to implement the competencies.

Training and education – these activities are a logical follow-on from the wide spread up-take of competency standards. The Association can position itself to be instrumental in the introduction of appropriate materials and course work for industry training and education.

There are significant examples of training and education programs in the UK and USA, which could provide a basis for materials and courses in Australia. Some of these have been developed and delivered by the industry associations themselves. The WMAA will form an alliance with one or more of these kindred associations and introduce direct and modified training and educational course materials into the Australian industry.

Broad Membership engagement - our Association is comprised of a very wide cross section of interests, ages and disciplines. We have Members who represent our next generation of managers and leaders, there are educators and community liaison specialist, regulators, senior managers and technologists from all of the aspects of waste management.

We are challenged with effectively engaging all of these people and interest areas, with managing the diversity of opinions and needs, and with stimulating their interest and participation in the activities of the Association. It is appropriate for us to put in place organisational structures and protocols that can

accommodate this diversity and stimulate personal and professional development of all our Members.

5.3 Profile

Industry Unification – the waste management industry in Australia is very fragmented. There are at least five separate associations representing different sections of the industry, and there is significant overlap in their coverage. Thus far there is no national body that provides appropriate coverage for either the industry as a whole or any sector within the industry.

In forming Divisions, the WMAA clearly recognised the need for Members to group into special interest areas relevant to their businesses and professional interests. Many of the issues that Members of Divisions are focusing on have a direct impact on their industry sector and are highly relevant industry development initiatives. The Association is well positioned to use the Divisions as a seed for the formation of national industry forums for a voice to government and the community.

Relationship within Asian-Pacific – the waste management and resource recovery needs of countries in the Asia-Pacific region will dwarf any demands that exist in Australia. And many of the skills, technologies and practices that we have and are developing can be readily adapted for use in this region. There is an opportunity for the WMAA to develop relationships with kindred organisations in the Asia-Pacific region and to assist in the dissemination of Australian technology and know how. Through our collaborative venture with AWA and the ENVIRO Convention and Trade Exhibition the WMAA has established a platform to project our industry capabilities across both domestic and export markets.

6. STRATEGIC DIRECTIONS & KEY ACTIONS FOR WMAA

The Strategic Directions for the Waste Management Association of Australia lie in the five areas of:

- A. Technology;
- B. People & Skills;
- C. Profile;
- D. Membership & Participation; and
- E. Communication & Knowledge;

and emerge from the key actions and roles that we can play in the changing complexion of our industry and markets. In the key actions listed below are opportunity areas for the Association. They represent directions that we will pursue in support of our Members and initiatives that we can incorporate into our planning for events, functions, publications and main activities.

6.1 Technology & Communication

- Build on our knowledge base in traditional waste management disciplines.
- Investigate and develop an understanding of the emerging technologies in waste management and resource utilisation efficiency techniques.
- Investigate and develop an understanding of integrated resource management systems.
- Investigate and develop an understanding of extended product responsibility issues and roles for the industry in their implementation.
- Strengthen our links with ISWA and the international community in waste and resource management to widen our networks and information exchange.
- Build on the quality of our existing information dissemination tools and ensure that each function addresses Member needs.
- Become active in the preparation and presentation of position papers, which project the Association into the debates on waste and resource management issues on a state and national basis.
- Actively promote Association representatives for relevant government committees and advisory groups.

6.2 People & Skills

- Promote the existing waste industry competency standards across the industry.
- Be active in the development of additional competency standards as required.
- License waste industry training programs and modules to accredited training service providers for delivery to the industry.
- Develop strong links with tertiary education and training institutions that are developing the future generation of waste and resource managers, and become active in determining the content of such education and training programs.
- Establish strong ties with students undergoing tertiary education and training and introduce activities that involve them in the Association.
- Develop mentoring schemes for young professionals to assist them in their personal and professional development.
- Engage a wide spectrum of stakeholders in waste and resource management and build-up our Membership base.
- Develop tools and training systems for engaging waste generators and other related groups in responsible waste and resource management.

6.3 Profile

- Build up our involvement in the ENVIRO Trade Exhibition.
- Be active in the evolving alliance of the Environmental Forum.
- Develop and distribute a directory of Members.

- Facilitate national linkages between the various industry associations that represent members of the waste industry.
- Facilitate a national presence for the waste management industry.
- Actively develop and promote Australian training capacity for delivery to waste managers in Asia-Pacific countries.
- Incorporate accredited and recognised training programs into our conferences and workshops.
- Build-up our Corporate Membership.

The key actions and strategic directions will form the foundation for our forward planning, our future initiatives and our positioning as we seek to attract new Members and better service existing Members.

6.4 Organisational Issues for the WMAA

Initiating many of these key actions will have ramifications for the Association with regard to our resourcing, organisation and operating protocols. Some of these issues are listed below as additional actions we must take if we are to progress along the strategic directions.

- Develop internal protocols that facilitate the presentation of issue papers and recognise the diversity of opinion and positions within the industry.
- Implement internal structures that allow for broad-based interest group engagement within the Membership of the Association.
- Develop capacity to resource the preparation and presentation of issue papers.
- Establish strategic links with kindred international associations for the utilisation of their existing training materials in Australia.
- Develop in-house resources and capabilities to manage the training systems alliances with overseas partners, to adapt existing training programs and modules and to license accredited training service providers.
- Establish resources to promote the Association to widen our exposure to governments and the community and extend our Membership.

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