Analyst Visit: 18 to 21 April 2011

Tata Steel in Europe
Management Presentations
Dr. Karl-Ulrich Köhler

Tata Steel

Our Strategy in Europe
Tata Steel Group: Diversified Global Steel Player

- One of the flagship companies of the Tata Group and one of the world’s top ten steel companies in terms of crude steel production volume
- One of the most geographically diversified steel producers with crude steel capacity of approximately 28 Mn tonnes*
- A balanced global presence in over 50 markets and manufacturing operations (incl. downstream) in 26 countries
- An employee strength over 81,000 across 5 continents
- Investments in Minerals Assets improving Raw Material Security
- Group turnover (FY10): US$23bn
- Group EBITDA (FY10): US$2.1bn

* Based on 2009/10 figures
Tata Steel in Europe

• In 2007 Tata Steel Limited acquired Corus Group plc
• On 27 September 2010 Corus rebranded to Tata Steel
• Sectors: Automotive, Construction, Lifting & Excavating, Energy & Power, Packaging, Rail, and Industry
• Crude steel capacity of 18 mtpa,
• The 2nd largest steel producer in Europe
• 35,000 employees
Our context

- Significant raw material inflation continuing
- Working capital demands are huge to finance inventory
- Imports levels significant in EU despite fragile demand
- Challenge to pass through this burden fully to customers in a fragile market

- The market is still recovering but better than last year
- Environment for business performance has been extremely tough in calendar Q4 across Europe
- Most sectors will take 4-5 years to recover
Strategies for a new brand in the European Market
Where do we stand today?

Confidence restored
• Refinancing
• Rebranding
• New business model
Strategies for a new brand in the European Market
Moving towards Customer focus

Confidence restored
• Refinancing
• Rebranding
• New business model

Customer Focus
• One face to the customer
• Sector focus
• Reliability and trust
• Partner for solutions
• Full scope supplier
• Innovating together
Enabling our customers to perform in their markets

Customer focus, Market sector teams, Serving our home market

**Customer sectors**
- Understanding customer needs & challenges
- Market sector differentiation
- Full scope supplier
- Extensive product range

**Service**
- Dedication & commitment
- Ease of doing business
- Innovating together
- Offering problem solving solutions
- Partnering for growth

**Home market**
- A European perspective on our home market
- Aligning our assets
- Optimising routes to market
- Extending our reach
Key sectors

Current

2015/16

- Construction: 20%
- Automotive: 35%
- Lifting & Excavating: 12%
- Energy & Power: 5%
- Other key sectors: 8%

Current sector: 40%

2015/16 sector: 35%
Lifting & Excavating

The market

• small number of international players with global footprints
• Highly steel intensive sector
• Complex supply chain
• Significant growth forecast:
  • Fuelled by commodity extraction, construction demand and industrial growth in developing markets
  • Demand growth by 31% between 2009 and 2012 (developed markets)
  • Commodity price boom leading to surge in mining equipment demand in emerging economies

Customer challenges

• Increasing industry consolidation
• Rapid expansion of emerging markets. Much new OEM investment taking place in developing regions.
• Emergence of Chinese players into the international market

Competitive advantage

• Our distinct product offering
• International reach
• Functional expertise
• Downstream capability
Lifting & Excavating

Our offering

- New sector focused approach centres on the customers’ needs
- Stronger partnership with customers to support their globalisation ambitions
- Simplification of the purchasing process. Fewer points of contact. Doing business becomes easier.
- Cohesive technical partnership through the product life cycle

An example

Expanded supply in to key customers

Market Share growth

Addressable market share – EU and NAFTA

Sector share of special profile production

<table>
<thead>
<tr>
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<th>2015/16</th>
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<tbody>
<tr>
<td>60%</td>
<td>80%</td>
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Current | 2015/16
Strategies for a new brand in the European Market
Moving towards customer focus with technological innovation

Confidence restored
• Refinancing
• Rebranding
• New business model

Technological Innovation
• Process innovation
• Product innovation
• The right steels and grades are available to our customers
• Creating the right platform

Customer Focus
• One face to the customer
• Sector focus
• Reliability and trust
• Unique service
• Partner for solutions
• Full scope supplier
## Technological innovation

Unique global R&D for process and product development

<table>
<thead>
<tr>
<th><strong>R&amp;D</strong></th>
<th><strong>Process Innovation</strong></th>
<th><strong>Product Development</strong></th>
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<tbody>
<tr>
<td>5 global R&amp;D facilities</td>
<td>Securing the future</td>
<td>Increasing customer offerings</td>
</tr>
<tr>
<td>4 in Europe, leveraging in and out of India</td>
<td>Yield improvement</td>
<td>Improving the portfolio</td>
</tr>
<tr>
<td>Almost 800 researchers in Europe</td>
<td>Cost effectiveness</td>
<td>Problem solving service</td>
</tr>
<tr>
<td></td>
<td>Continuous improvement &amp; breakthrough technology</td>
<td>Innovation together with our customers</td>
</tr>
</tbody>
</table>
Confidence restored
- Refinancing
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- New business model

Technological Innovation
- Process innovation
- Product innovation
- The right steels and grades are available to our customers
- Creating the right platform

Operational Excellence
- Optimise Supply Chain
- Reliability in service
- Continuous improvement
- Investment in (technical) skill set of people

Customer focus
- One face to the customer
- Sector focus
- Reliability and trust
- Unique service
- Partner for solutions
- Full scope supplier
Operational Excellence

Increase reliability to the maximum

Assets
- Asset performance improvement; quality, reliability, cost
- Asset portfolio optimisation

Flexible working
- Flexible workforce & working patterns
- Quick response to delight not just satisfy our customers
- Speciality steels focus

People
- Partnerships with universities
- Academy & training
- European leader in H&S
- Motivated people
Confidence restored
- Refinancing
- Rebranding
- New business model

Technological Innovation
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- Full scope supplier

Cost Leadership
- Raw materials value in use
- Enhancement of productivity and efficiency
- Value of maintenance
- Reducing our costs to serve our markets
- Improving energy self-sufficiency
- EU ETS effect
Cost leadership

Flexible working model only way to create value for our customers in Europe

First steps...
- Weathering the Storm
- Fit for the Future

Improving position...
- IJmuiden – world class
- Port Talbot – cost competitive European player
- Scunthorpe – the flexible player in European market

Supported by…
- Intensified capital investment
- Asset productivity
- Creating flexibility
- Raw materials strategy
Tata Steel in Europe

Customer Focus

Understanding customer needs and challenges and enabling them to perform in their markets

Organising for success and creating excellent value by continuous improvement

Operational Excellence

Completing our product offering and innovating process improvements

Cost Leadership

Switching fixed to variable costs and delivering whilst maintaining our performance
The Tata Steel Group vision is to be the world steel industry benchmark for value creation and corporate citizenship

- One integrated, customer-driven company
- Dedicated to understanding our customer’s business
- Assisting our customers to perform in their market
- Working and growing in partnership
- Built on strong values and reputation
Debashish Bhattacharjee
Research, Development & Technology
“We maximise value creation for TSG by creating stakeholder delight through world class differentiating research”
RD&T Sites

United Kingdom
- Teesside
- Rotherham
- Coventry

The Netherlands
- IJmuiden

India
- Jamshedpur
RD&T Sites

IJmuiden Technology Centre

Swinden Technology Centre

Teesside Technology Centre

Tata Steel R&D Jamshedpur

Two small satellites: Automotive Engineering Group in Warwick
ECM2 in Port Talbot
People

% Employees on sites

- IJTC NL: 37%
- STC UK: 14%
- TTC UK: 7%
- R&D IND: 15%
- SS IND: 22%
- RTG IND: 2%
- AEG UK: 2%
- GIPS NL: 1%

22% of employees are on sites in IJTC NL.
People (EU)

% PhD of Researchers

- PhD: 39%
- Research without PhD: 61%

Age distribution in EU

<table>
<thead>
<tr>
<th>Age category</th>
<th># of employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>20-34</td>
<td>100 (NL) 50 (UK)</td>
</tr>
<tr>
<td>35-44</td>
<td>150 (NL) 75 (UK)</td>
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<tr>
<td>45-54</td>
<td>200 (NL) 100 (UK)</td>
</tr>
<tr>
<td>55+</td>
<td>50 (NL) 25 (UK)</td>
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</table>

Legend:
- NL
- UK
Process Research, areas of work

- Ironmaking
- Steelmaking and Casting
- Ceramics Research Centre
- Rolling Metal Strip
- Long Product Rolling

High Temperature Innovation Centre
Teeside Technology Centre
Product & Product Application Research, areas of work

Product
- Steel Metallurgy
- Coated Products

Product Applications:
- Automotive
- Industrial & Construction
- Packaging

Thermo mechanical treatment simulator
IJmuiden technology Center
Some examples of trial facilities & equipment

- Scanning
- Welding
- Multi mill
- Microscopy
- Pilot Packaging line
Recent successes

Displace competitor’s product
Through strain analysis on gridded component, established DX57+Z grade from IJmuiden at Ford.
Examples of Project wins across the Group

- Hydroforming for Tata Nano
- Automatic Surface inspection
Hydroforming for Tata Nano

Major strain
Material: S315 MC

Hydroforming experience in Europe used for designing hydroformed parts in the Tata Nano
Automatic surface inspection

Below the before and after photo’s

Top side (before)

Top side (after)

Bottom side (before)

Bottom side (after)

Work on automatic surface inspection system in Jamshedpur, following work done at IJmuiden
Break through technologies – the challenge

• Scarcity
  – Complete utilization of iron ore
  – Reducing ash in coal

• Environment
  – Making of steel contributes 4-6% of man made CO2
  – Blast furnaces are responsible for 80% of the emissions

• Market

• Yield and efficiency
Examples of break through in incubation

- 20% reduction in CO₂ emission in ironmaking – HISARNA
- Photo voltaic
- SBEC
HISARNA technology

Comparison with the BF route

Iron ore → sinter → Blast furnace → Liquid iron

coal → coke
HISARNA technology

Comparison with the BF route

Iron ore $\rightarrow$ sinter $\rightarrow$ Blast furnace $\rightarrow$ Liquid iron

coal $\rightarrow$ coke

TATA STEEL
HISARNA technology

Key features

- **Ore fines** are molten in a cyclone reactor
- **Granular coal** is directly injected in the smelter
- The use of pure oxygen results in nitrogen free topgas
- The combination with **CCS** is easier to achieve
Pilot plant at Tata Steel in IJmuiden

- The HISARNA pilot plant is in IJmuiden, starting in first half of April 2011
- The capacity is 8 t/h hot metal
- The expected benefits of the process will be experimentally validated
```
“We will use the building envelope to save, produce, store and export energy, cut CO2 and address worldwide sustainability issues using functional coatings.”
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Significant commitment with industrial, academic and government partners

- a) PV ACCELERATOR - £11m over 3 Years
- b) SPECIFIC - £20m over 5 Years
- c) Sustainable Building Envelope Centre (SBEC) - £7m over 3 Years
Photo Voltaic

**Counter Electrode**
- Transparent films and coatings allow light through
- Completes electrical circuit and prevents moisture ingress

**Dye Sensitised Solar Cell (“filling”)**
- Dye + absorber layer provides the electrical driving force
- Electrolyte helps to transport electron across the cell

**Working Electrode**
- Coated steel will ultimately become the roof cladding
- Build-up of layers allows individual cells to be repeat printed

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- **Diffusion barrier**
- **Counter electrode**
- **Electrolyte**
- **PV absorber layer + Dye**
- **Back contact layer (photocathode)**
- **Insulating layer / diffusion barrier**
- **Metal**

Light (photons)
Market: Automotive

- Increasing customer offerings
- Problem solving service
More than 100 collaborations with institutes and universities across the globe
Dook van den Boer

The IJmuiden site
At the heart of our Strip Products Mainland Europe business
Tata Steel in IJmuiden

- Top producer of steel in Europa
  - 9,300 FTEs, 450 research staff
  - approximately 7 million tons of steel in 2011
  - Integrated production process
- Much attention for the environment
  - Environment, employment and knowledge
  - €0,5 billion spendings in the region
- Tradition of innovation and continuous improvement
  - Processes: i.e. 7% energy savings 2005 – 2012
  - Production assets: over €800 million investment in state-of-the-art installations
  - Products: lighter, stronger, premium (automotive, construction and packaging)
Tata Steel
In Europe

- European manufacturing base to supply demanding markets:
  - Automotive
  - Construction
  - Energy and Power
  - Lifting and Excavating
  - Packaging
  - Engineering, Shipbuilding, Defence & Security
  - Rail, Consumer Goods, Aerospace
- Sales offices and service centres in close to 50 countries
- 2nd largest steel producer in Europe, crude steel capacity of 18 mtpa, 35,000 employees
Tata Steel
Transforming to meet customer requirements

- Implementation 2010 – 2011:
  - One integrated, customer-driven company
  - Built on strong values and reputation
  - Dedicated to understanding your business
  - Assisting you to perform in your market
  - Working and growing in partnership
Innovation challenges for Tata, linked 1-to-1 to the “Innovation Union” strategy for the flagship projects

- From commodities to high value products and custom-made solutions (Smart Growth)
  - Klantgerichte toepassingen, via bijvoorbeeld Early Vendor Involvement (EVI)
  - Hoogwaardige producten bijv. ultra hoge sterkte stalen voor lichtere en zuinigere auto’s, materialen voor elektrische auto’s
  - Functionele producten: bijv. energie producerende oppervlakten (PV), bouw “systemen” voor duurzamer bouwen

- Energy and Climate Change (Sustainable Growth)
  - Energy saving and CO₂-reduction
    - Continuous improvement, waste heat utilisation and process integration (DSP)
    - Through breakthrough technologies such as HIsarna, biomass, algae etc.
  - New “green” products: energy efficient buildings and lighter cars
Innovation challenges for Tata, linked 1-to-1 to the “Innovation Union” strategy for the flagship projects

- Resource efficiency and raw materials shortage— also for steel products (Sustainable Growth)
  - Use of wider selection of Iron Ore and coking coal
  - Effective use of necessary alloys such as Nb, Ti etc.
  - More effective use of Zinc and Tin in innovative coatings (f.i.: MagiZinc, FeSn etc.)
  - Maximize recycling (f.i.: use of scrap)

- Developing people (Inclusive growth)
  - Tradition of innovation and continuous improvement
  - Tata Steel: R&D-organisation global network
  - Own RD&T in IJmuiden
  - Close cooperation, both national and international
  - European leader in Research Fund for Coal and Steel (= RFCS not FP)
  - Highly educated staff for implementation
  - Own training institute
  - Good contacts with institutes for Higher and Intermediate Vocational Education

### Year 2001 vs 2010

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<tr>
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<tr>
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<td>12%</td>
</tr>
<tr>
<td>HVE</td>
<td>12%</td>
<td>17%</td>
</tr>
<tr>
<td>IVE 4</td>
<td>21%</td>
<td>27%</td>
</tr>
<tr>
<td>IVE 3</td>
<td>26%</td>
<td>24%</td>
</tr>
<tr>
<td>IVE 2</td>
<td>18%</td>
<td>12%</td>
</tr>
<tr>
<td>LVE</td>
<td>13%</td>
<td>8%</td>
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### RD&T IJmuiden

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<td>AC</td>
<td>51%</td>
</tr>
<tr>
<td>HVE</td>
<td>25%</td>
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<tr>
<td>IVE 4</td>
<td>14%</td>
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<tr>
<td>IVE 3</td>
<td>5%</td>
</tr>
<tr>
<td>IVE 2</td>
<td>3%</td>
</tr>
<tr>
<td>LVE</td>
<td>2%</td>
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M2i Materials Innovation Institute

- Knowledge Platform for Dutch industry and knowledge institutions in the field of materials (including SMEs)
- Tata Steel is a major partner of M2i (both administrative support, content (industrial advisory board), and daily guidance)
- Binding force between materials innovation and implementing partners (Technical Universities of Delft, Groningen, Twente, Eindhoven and TNO)
- Strategically important for Dutch knowledge in materials field (science disciplines, including materials under pressure throughout western Europe)
- European example: bridge between science and industry
  - Belgium: University of Louvain
  - Germany: RWTH Aachen, Max Planck Institute für Eisenforschung
  - United Kingdom: University of Cambridge
  - Scandinavia: Chalmers University
  - Switzerland: Ecole Polytechnique Fédérale de Lausanne
- Innovation Union = new impetus for innovation partnerships
Innovative sustainable product development

- PPP Green Car
  - Advanced high strength steels (stronger and lighter)
- PPP Energy Efficient Buildings
  - Lighter and stronger sheet piling
  - Insulating sandwich panels
  - New materials for storing energy in walls
  - Energy generation through solar cells on steel substrate
  - Recycling
    - Steel best recycled material
    - Recycling packaging steel 89% in the Netherlands
- Every ton of steel that is recycled saves 1.5 ton iron ore, 500 kilo coal and 60% energy
FP6 ULCOS – Hlsarna (pilot project in IJmuiden)

- A significant new process concept that the direct use of powdered raw materials permits. Coke oven and ore agglomeration steps no longer necessary
- **Iron ore** is melted in the cyclone reactor
- **Fine coal** is injected directly into the melter
- The use of pure oxygen results in a nitrogen free process gas
- This makes it easier to achieve the combination with CCS

Hlsarna technology provides potential 20% reduction in CO2 emissions, with CCS this goes up to 80% but technology only available on an industrial scale after 2020
Jon Ferriman
Strip Products UK
Value creation with customers and cost flexibility
Strip Products UK within Tata Steel

Tata Steel Group

Tata Steel Limited
- Tata Steel India
- Tata Steel Thailand
- NatSteel Asia

Tata Steel Europe
- Strip Products UK Hub
- Long Products Europe Hub
- Strip Products MLE Hub
- Speciality Businesses

Support Functions & Supply Chain

Sales, Marketing & Distribution
Strip Products UK: Business Management Team

Uday Chaturvedi
Chief Technical Officer

Jon Ferriman
Hub Director
Strip Products UK

Mike Wixey
Engineering Director

Ian Hobson
Technical Director

Ian Phillips
Director, Heavy End

Steve George
Director, Mills & Internal Logistics

Mark Davies
Head of Health, Safety & Business Excellence

Robert Bizzell
Finance Director

David Vineall
HR Director

Tracy Pinkney
Regional Procurement Director

Matt Yeates
Supply Chain Director

ENGINEERING

TECHNICAL

MANUFACTURING

FUNCTIONS
A brief history of Strip Products UK

• 1837 Port Talbot opened – named after principal sponsor of the dock, Christopher Talbot of Margam
• 1923 First expansion completed – known as “Margam Works”
• 1962 Llanwern works opens
• 1967 British Steel Corporation formed – Nationalisation of 14 steel companies (peaked at 250,000 employees)
• 1988 Privatisation
• 1999 Merger of British Steel and Koninklijke Hoogovens to form Corus
• 2001 Closure of the Llanwern Heavy End
• 2005 Cultural Change Programme, ‘The Journey’ begins
• 2007 Tata acquires Corus
• 2008 Economic crisis leads to Llanwern Hot Mill and Blast Furnace 4 mothballing
• 2009 Blast Furnace 4 and Hot Mill re-start
• 2010 £60M BOS Gas recovery scheme launched
• 2010 £185M investment to rebuild Blast Furnace 4 announced (2012)
• 2010 Corus changes brand to Tata Steel
• 2011 New Operating Model implementation
Strip Products UK overview

- Producer of strip steel for UK and European markets
- Manufacturing sites in Port Talbot and Llanwern
- Capacity to produce 4.8 million tonnes of product per year
- Approximately 5000 employees
- Annual turnover of £1.7 billion
- Iron and steel production, hot rolling, cold rolling and galvanising facilities
A vision to create a sustainable steel industry in Wales

- Our “Journey” change programme
- Step change in safety culture and performance
- Weathering the Storm
  - 5000 ideas, £200m saved, flexible working model
- We have earned the right to investment
  - BOS Gas recovery scheme
  - BF4 rebuild
- Ambitions
  - Self sufficiency
    - Margam Coal Project
    - Energy
  - Product Range
  - A key part of the Welsh economy
Tata Steel in Europe has approximately 50 % share of the UK market and also delivers to selective European Markets (e.g. Northern Spain, Germany, Belgium, Netherlands, Northern France).
Sectors and Applications

Finished coils

Sectors & applications

- Construction
- Packaging
- Tubes
- Automotive
- Consumer Appliances
- Radiators
- Electronics
- General engineering
Llanwern Site
Value creation with customers and cost flexibility
Llanwern steelworks

- Built in early 1960’s by Richard Thomas and Baldwin

Site 4 Miles by 2 Miles

Heavy End
- 2 Coke Ovens
- 3 Blast Furnaces
- 2 Casters

Hot Strip Mill

Pickle Lines

Cold Mill

Galvanising

Coil Inspection Lines
Llanwern steelworks

- Known as RTB, then Spencer works and later Llanwern works
- In full production employed around 10,000 people
- It was the first oxygen-blown integrated steelworks in Britain when it opened in 1962
- Rail links to main-lines and good infrastructure to road and sea
- Reduced resource in early 1980’s through “Slimline” to around 2,000 people
- Ceased iron production in 2001
- Slab now supplied from PT
- Highly flexible and cost driven operation branded “New Llanwern”
Current configuration

- Hot Strip Mill
- 2 Pickle Lines
- Cold Mill
- Zodiac
- Packaging & Distribution
Llanwern: Steel park philosophy

- Construction & Engineering Products
- MSS
- Distribution UK
- Slit Centre
- Central Engineering Workshops
- Central headquarters for:
  - Commercial
  - Supply chain
  - Accounts
  - SMT
- Aim to bring other satellite units on to Llanwern site.
**Llanwern manufacturing: Cost leadership**

- Prior to Weathering the Storm: 1000 employees
- Base of 580 employees flexed up to 715 at present
- Lean structure
- Flexible and highly trained workforce
- Flexible plant model
- Challenging product mix – HS, Durbar, DP grades
- Only automotive galv line in the UK
- Only line in UK for ‘Pickle and Oiled’
Andy Dunbar

Our “Journey” change programme
2005: The Strip Products UK change begins

• “The Journey”

• launched in September 2005 as an organisation cultural change programme

• born as a response to tragic events but has became an enabler to everything we do
The Strip Products UK Change model

“The best way to predict the future is to go and create it”
2005
Engagement
Recognition of ‘As-is’ and ‘Ideal’ Bicycle projects

- Recognising the leadership challenge
- Engaging our people
- Who we are (“as is”) and who we want to be (“to be”)
- Learning what it would mean for us all
Our change in style

Our style 2005: ‘as is’

Duck the issues – avoid uncomfortable situations
Fail to recognise good; quick to punish
Status and influence through being critical
Being responsive to the demands of superiors at any cost
Centralised decisions – people tend to do only what they are told to do
Avoid conflict – relationships are pleasant (at least superficially)
Must agree with and be liked by authority to get on
Our change in style

The style we aspired to: ‘to be’

Involve others in decisions that affect them
Resolve conflict constructively – with respect
Positive recognition and reward
Concerned about personal growth and well being
Do even the simplest tasks well
Challenging unacceptable behaviours and standards
Set stretch goals and plan to deliver
Look for win:win and opportunity to learn
Strip Products UK: The Journey

**2005**
Engagement Recognition of ‘As-is’ and ‘Ideal’ Bicycle projects

- Business Management Team
- Executive Committee
- Top 100
  - Top 100
  - Top 100
- Trades Unions
- Contractors
- Others (THMs)

**2006**

- Management + TU’s + Supply partners
- STEP 2 Demonstrate potential
- STEP 1 Engagement

- Standards, behaviours Performance improvements
- Liberty Events x3 ‘VALUES’
- Using the energy
- Getting people involved
- Key business projects
- Huge safety programme for >6,000 people
- 500 employees developed their own behaviours supporting our values

- Time-out for Safety
- 3 key projects -
  - 5 million tonnes of slab
  - 3 million tonnes PT HSM (Quality yield, cost tonnes)
  - Mills Strategy New Llanwern 2
    - Continuous Improvement programme
Strip Products UK: The Journey

2005
Engagement
Recognition of ‘As-is’ and ‘Ideal’
Bicycle projects

2006
STEP 2
Demonstrate potential
Management + TU’s + Supply partners

STEP 3
Delivery
Others (Rollout)

STEP 4
Performing
Others (THMs)

2007
Embed our Values
Values / Behaviours
Q1 Rollout to ALL

Engaging everyone in our values and behaviours
Goals 2007 engagement and deployment
Goals, Values and Behaviours

Our goals define the ‘what’

Our values define the ‘how’
Values & behaviours 2007

• Values proposal rolled out to cross-section of 500 employees

• 500 employees developed the ‘desired behaviour’ examples

• Values and rules booklet (the how) issued
  • To all employees
  • Cover note. Summary and process.

• 65 engagement events
  • 5000 employees and contractors
  • Hosted by BMT with TU support
  • Days, nights, weekends
Goals translation 2007 (OGSM)

• Developed the business mission, vision and goals
  
  • **Vision:** “To create a sustainable steel industry in Wales”
  
• Bottom-up process
• Areas and functions developed goals
• ‘Blue book’ (the what)
  
  • containing our values and goals to level 4 for all 5200 employees.
• An early introduction to OGSM
Strip Products UK: Our Journey

2005
- Engagement
- Recognition of ‘As-is’ and ‘Ideal’
- Bicycle projects

2006
- Standards, Behaviours, Performance, Improvements
- Liberty Events x3 ‘VALUES’
- Time-out for Safety

2007
- Values / Behaviours Q1 Rollout to ALL
- Embed our Values
- 3 key projects -
- Next phase of safety improvement performance
- 5 million tonnes of slab

2008
- Mills Strategy
- New Llanwern 2
- Continuous Improvement programme
- We keep going, we have momentum

STEP 1
- Engagement

STEP 2
- Demonstrate potential

STEP 3
- Delivery

STEP 4
- Performing

STEP 5
- Embedding Building

Business Management Team
- Executive committee

Top 100
- Trades
- Trades Unions
- Contractors

Management + TU’s + Partners
- Others (Rollout)

Others (THMs)

We keep going, we have momentum
Early achievements concurrent with The Journey

- **Safety**
  - A leap forward in our safety performance
  - Safety teams, making a real difference
  - 1,000 days of no LTA at Aluminised

- **Customers: Ford Q1 award**

- **Record performances**
  - Morfa
  - Blast Furnaces, Steelplant, Casters
  - PT HRP
  - Aluminised
  - Zodiac
  - Link & Capl
  - Del ops
  - GCI usage

- **3 million tonnes milestone at PT HRP**

- **Llanwern flexibility**

- **Investments**
  - Quench tower
  - BOS Gas Recovery £60M

- **5,000 sign up to our values**

- **Blast Furnace re-organisation pilot**

- **Recruitment, across the board**

- **190 apprentices in training**

- **Drug and Alcohol community counsellors**

- **Our Journey 2 years-on celebration**

- **Positive Press coverage**
  - Business, community and employees

- **Supporting the community**
  - Great Welsh run
  - Richard Burton 10k run
  - Kids of steel, Triathlon
  - Talkback NP19 young citizens safety
  - Special Needs Activity Centre support

Strip Products UK: Creating a sustainable steel industry in Wales
Strip Products UK: Change Behavioural Model

Higher Purpose

Mission

To create a sustainable steel industry in Wales

Values belief

Capability

Behaviour

Environment

Aligned

Recognition

Educate

Misunderstood

Malicious

Intolerance

Misaligned

Integrity

Unity

Responsibility

Understanding

Excellence

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Strip Products UK: Change programme

The reality check
Understand our current ‘as is’ and ‘to be’

Engagement
Getting people ready to go for a new future

Focused deployment
A portfolio of initiatives

Engine Room
A change process to make it happen

Embedding the culture
Activities to keep up the momentum

Higher Purpose
Mission
Values and belief
Capability
Environment
Recognition
Aligned
Misaligned
Intolerance
Malicious
Misunderstand
to create a sustainable competitiveness in Bristol

It’s not the strongest species that survive, nor the most intelligent, but the ones who are most responsive to change.

Charles Darwin

2005
2006
2007
2008
2009
2010
2011
2012

SUSTAIN
Goals revolt in all
Process safety
SMiPT KSM
New Leanware 2
Achieve our goals
Improve/improve

STRETCHING OUR TARGETS
‘Weathering the Storm’

2008/09
Goals 2008/09

SUSTAINING OUR FUTURE

TATA values embed
TATA values launch
One company approach
OGSM overdue & progress
Sustaining our future
2020 vision
TDEM
TSE change process alignment
Embracing the Tata brand

STEP 1: Engagement
STEP 2: Demonstrate potential
STEP 3: Delivery
STEP 4: Performing
STEP 5: Embedding
STEP 6: Facing challenges
STEP 7: One company approach

TATA STEEL
“It’s not the strongest species that survive, nor the most intelligent, but the ones who are most responsive to change”.

*Charles Darwin*
The Zodiac Line
Value creation with customers and cost flexibility
Zinc & Other Developments In Alloy Coatings
ZODIAC
Operational Excellence

OEE and Cost are the two drivers for all review meetings

Process performance measured by OEE

Customer Complaints
A weekly PDCA discusses customer complaints and their root cause, along with analysis and action plans.

Process transient condition monitor
This system has been developed to capture those small changes which normally average out. This will not only protect the customer but will also give Zodiac lead indicators about which areas to work on.
Supply Excellence

• Supply Chain process developments
  • £80M investment to re-engineer Europe-wide supply-chain order planning & fulfilment processes
• Through Supply Chain efficiencies
  • Enhanced order fulfillment processes
    – decoupling of semi finished products at appropriate intervention points in order to reduce supply leadtime and increase inventory flexibility
  • Design & deployment of lean processes across the UK supply chain
    – eg Hot coil receipt to Corby, reducing lead-times, working capital & improving material flow
  • Increased supply flexibility
    – extending the range of products that can be exchanged within the TSE group in order to enhance value creation and support supply continuity
Customer Focus

• Product portfolio progression
  • Development of value-creating product solutions in line with the market-driven strategic product roadmaps
    – Super Bainite: Armour-plating applications
    – High silicon steels for power industry
    – High carbon steels for automotive & construction industries
    – Extended coated product capability: GI FF for automotive exterior components
    – Boron steel: Hot stamping applications

• External accreditation to demanding standards: TS16949
Sam McCloy

Tata Steel Construction Products

Business Overview
Tata Steel Construction Products
About Us

• 90 employees operating within Tata Steel Distribution; one of three new operations set up on the Llanwern site utilising excess warehousing and logistics capability

• Specialists in the production of cold roll formed sections with over 50 years experience in design & manufacture of precision engineered sections

• 100% supplied with high quality steel from Tata Steel Europe’s production plants in Wales

• Business focus
  • Cost efficiency post-recession
  • Growth via customer intimacy and product innovation
  • Market sector-based organisation in line with corporate strategy
Market Sector & Product Range
Construction

• A range of roll formed products for the construction industry – used for their combination of low cost and high structural performance

• Steel Floor decking – used in conjunction with in-situ concrete to form composite flooring for large residential and commercial buildings

• Light Steel Framing – up to 8 storey construction for cost and speed

• A range of specialist sections with a wide range of application in construction
Market Sector & Product Range
Highways

• 50 years of production of Highway vehicle restraint systems
• Completely re-engineered to European Standard in 2004
  • State-of-the art computer simulation
  • Fully crash tested
  • Installed via specialist companies to ensure compliance to standard
• Intention to exploit technology across Mainland Europe
Market Sector & Product range
Energy

- Low cost & high performance structure for mounting solar PV modules
- High strength steel, high performance galvanised coating for long service life
- Supplied in kit form for local assembly and installation
  - Projects supplied in Spain, Germany, Bulgaria, Reunion Island
- Panels are gently fed into the structure from either end, with no need for additional fixings
New Product Development
Loadsafe Platform

• Developed in-house in response to a number of accidents caused to employees and contractors working on the back of vehicles

• Allows safe access to secure loads without accessing the vehicle

• 5th generation product now ready for external commercialisation

• Manufactured from Tata Steel made in Wales

• Fabricated in Wales
Supporting Team and facilities

Precision tool manufacture

• Roll design facilities utilising CAD/CAM and CNC machinery
• State of the art roll forming simulation technology

Fabrications Unit

• Our fully equipped steel fabrications facility can manufacture a range of bespoke and standard products, expertly designed and skillfully engineered by our highly trained fabricators and welders.

Engineering Development

• Development engineers assist with the development of customer products, from initial concept through to value-engineered design. Optimising the design allows us to manufacture a quality product for lowest cost
Jim Naylor

Orb Works: The Cogent Power business

A speciality business with customer product offering
Contents

The Units

Electrical Steel Products

Markets
Cogent Business Dimensions 2010/11

Surahammar
Surahammar, Sweden
NO Electrical Steel
Employees 170

CPI
Burlington, Ontario
Transformer core manufacturing/slitting centre
Employees 200

Orb
Newport, S Wales
GO Electrical Steel
Employees 401
Cogent Power

Orb Electrical Steels (Wales)

- 1898 - W R Lysaught Company starts at Orb
- 1909 – Orb licensed to produce Silicon iron
- 1947 - Production of Silicon GO & NO steel starts at Orb
- 2008 – Production of NO stopped after 61 years Site focuses on GO production
- 2008 – Capacity of GO increases to 100 ktpa
Orb
Grain Oriented Generic Material Flows

- **Side Trimming**
- **Annealing & De-scaling**
- **Cold Reduction**
- **Decarburising Anneal**
- **Thermal Flattening**
- **Slitter**

**Flow Diagram**

1. **Hot Rolled Coil** → **Side Trimming** → **Annealing & De-scaling** → **Decarburising Anneal** → **Thermal Flattening** → **Slitter**
2. **Base Plate** → **Stalk** → **Preheat** → **Pickle** → **Clean** → **Trim** → **Laser** → **Slitter**
Surahammar Bruks (Sweden)

- 1627 - A “Crown Hammer” in Surahammar
- 1897 - First Swedish car is made in Surahammar
- 1916 - ASEA acquires Surahammar Bruks
- 1917 – First delivery of Hot Rolled electrical steel
- 1959 – Production of cold rolled grain oriented steel starts
- 1993 – Production of grain oriented steel ends. Specialises in NO steels
Surahammar
Non-Oriented Generic Material Flows
Cogent Power

Cogent Power Inc (Canada)

- 1970 - Cogent Power Inc. (formerly CorMag Inc) begins operation.
- 1993 - CorMag moves its operations into a larger 80,000 square foot facility.
- 1996 – CorMag installed and began operation of a new line to slit premium steels including Sura Electrical Steels.
- 2001 - Cogent Power acquired Cogent Power Inc. arising from a major restructuring in the market.
- 2003 - Cogent Power Inc. centralized its North American operations by moving its Burlington, Ontario plant to a larger 80,000 sq.ft state-of-the-art facility.
- Slitting & Manufacturing with GO and NO steels from Cogent Power
Strong Tradition of “Continuous Improvement”

• GE Global Ecomagination Leadership award 2008

• American Manufacturing Excellence award 2010 for Canada given its “outstanding performance in continuous improvement”.

• CEO Manufacturing Excellence award 2010

• Case studies in Books on Lean manufacturing

• Best Supplier award (all categories) AREVA UK….
Contents

The Units

Electrical Steel Products

Markets
Electrical Steels

• Form the magnetic circuit in electrical machines
  • Transformers, Generators, Ballasts, & Motors
  • Easy to “magnetise” (permeability)
  • Low energy loss during magnetisation

• Sold on magnetic properties
  • Total power loss sets the quality (lower the better)
  • Mechanical values can be influential but are usually not guaranteed
  • Range of Si content from 0.2% (poor losses) to 3.3% Si (best losses)

• Two types
  • Non Oriented (0.2% to 3.3%Si) Surahammar
    • Isotropic
    • Suitable for use in rotating machines
    • Sold as fully finished and semi finished
  • Grain Oriented (all 3.0-3.3%Si) Orb
    • CGO and HiB (High permeability)
    • Very good magnetic properties in rolling direction
Non Oriented (Surahammar)

- **Non Oriented** (0.2% to 3.3%Si)
  - Loss levels 8W/kg to 2W/kg
    - High Si Hrc (>2.4% Si). Used for best grades and thin gauge (<0.27mm), ie generators
    - Mid Si (1.8-2.4%). Used for intermediate grades ie ballasts, power steering motors, large industrial motors
    - Low Si (0.2%-1.3%). Used for smaller motors (white goods, pumps, compressors, fans)
  - All Fully Finished grades at Sura
Grain Oriented (Orb)

- **Grain Oriented** (all 3.0-3.3%Si)
  - 2 types  
    - CGO and HiB
      - Both have very good magnetic properties in rolling direction (losses of 1W/kg -0.70 W/kg)
      - HiB has better oriented “Goss” grains
      - Grain size is huge, 5-20mm
      - Differentiation between CGO and HiB is permeability (amount of electrical energy required to create a defined magnetic force)
  - **HiB** is generally much more difficult to make successfully reflected in the number of producers:
    - CGO 12 in the world
    - HiB  6 in the world
Electrical Steel in Use

Generators
High Si (some CGO)

Power Transformers
Laser DR, HiB

Distribution Transformers
CGO (also High Si NO)

Motors
Mid/Low Si NO
(also CGO)
Cogent Power Inc. is the North American leader in the supply of transformer cores for distribution, power and specialty magnetic applications.

High level technical strength and service approach has enabled strong growth and market development. Process volume of 34kt of GO and Hi-B expected in 2010/11.

A broad range of products shipped – strip electrical steel (50%); distribution transformer cores (42%); power transformer cores (8%). CGO, Hi-B and amorphous metals.

Strong market position and intimate customer knowledge solidifies market leadership in cores and gives upstream Cogent invaluable knowledge of customer requirements and market trends.

Progressive, high value selling, customer centred business.

Key in growth plans for Orb and service/niche plans for Surahammar in NA.
Contents

The Units

Electrical Steel Products

Markets
Cogent Customer Base

• Top 20

ABB
Siemens
Areva
Crompton Greaves
Imefy
LTC
Enpay
FKI
Emerson
Alstom
Kienle & Spiess
Hidria Rotomatika
ATB
OJSC
Danaher
General Electric
Camtran
Moloney Electric
Acme Electric
Delta Star Inc
Uday Chaturvedi

The Port Talbot site
At the heart of our Strip Products UK business
The Port Talbot site today

• The main site for our Strip Products UK steelmaking hub
• Benefits from Deep water harbour location
• Integrated Steelmaking facilities with added value product range capability
  • Packaging Steels
  • Automotive Exposed panels
  • Advanced High Strength Steels
• Organisation focussed on
  • Customer
  • Market Competitiveness
  • Cost Competitiveness
• 4,400 employees on site
• 5.0mt liquid steelmaking capability
## Major facilities – Port Talbot

<table>
<thead>
<tr>
<th>Facilities</th>
<th>Equipment</th>
<th>Statistics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Materials Handling</td>
<td>Deep water harbour</td>
<td>3 grab loaders / 160kt max vessel capacity</td>
</tr>
<tr>
<td>Iron making</td>
<td>• Coke ovens</td>
<td>• 1 battery containing 84 ovens</td>
</tr>
<tr>
<td></td>
<td>• Sinter plant</td>
<td>• 1 Lurgi, 344m² strand – 42t/hr</td>
</tr>
<tr>
<td></td>
<td>• Blast Furnaces</td>
<td>• 2 (No’s 4&amp;5) 10.8m hearth diameter, 2134m³ working volume (4.7Mt)</td>
</tr>
<tr>
<td>Steel making</td>
<td>• Steel converters</td>
<td>• 2 Basic Oxygen Convertors (330t each)</td>
</tr>
<tr>
<td></td>
<td>• Secondary metallurgy units</td>
<td>• 2 vacuum degassers, 2 secondary steelmaking</td>
</tr>
<tr>
<td></td>
<td>• Slab casters</td>
<td>• 2 double strand and 1 split mould twin casters</td>
</tr>
<tr>
<td>Rolling</td>
<td>• Hot Strip Mill</td>
<td>• 2 walking beam furnaces, 1 reversing rougher and 7 finishing stands (3500kt)</td>
</tr>
<tr>
<td></td>
<td>• Linked Cold Mill</td>
<td>• 1 continuous pickle line linked to a 5-stand cold reduction mill</td>
</tr>
<tr>
<td></td>
<td>• CAPL</td>
<td>• 1 continuous annealing processing line</td>
</tr>
</tbody>
</table>
Port Talbot Site

- Harbour
- Stockyards
- Sinter Plant
- Blast Furnaces
- Power Plant
- Steel Plant
- Coke Ovens
- Hot Mill
- Cold Mill
- CAPL
Tata Steel in Europe

**Customer Focus**

Understanding customer needs and challenges and enabling them to perform in their markets

**Operational Excellence**

Organising for success and creating excellent value by continuous improvement

**Cost Leadership**

Switching fixed to variable costs and delivering whilst maintaining our performance

**Technological Innovation**

Completing our product offering and innovating process improvements

*TATA STEEL*
Strip Products UK
Products and Markets 09-10

Sales by product
(tonnes)

Sales by market

Tata Steel in Europe has approximately 50 % share of the UK market and also delivers to selective European Markets (e.g. Northern Spain, Germany, Belgium, Netherlands, Northern France).
Deliveries by Market Area
Strip Products UK Hub

Key Sectors served by Strip UK
- **External**: Automotive, Industry Strip
- Via **Distribution**: Lifting & Excavating, Construction, Retail customers
- Via **Speciality Businesses**: Packaging, Construction
- C.65% of deliveries from Strip UK plants are to Tata Steel Distribution / Speciality Businesses in UK / MLE.
  - Joint approach to customer & Supply Chain

Strong Focus across the organisation on Customer
Cost Leadership - Recent efforts to improve costs base and market competitiveness

- BOS Gas Recovery system to reduce our environmental impact and improve cost competitiveness
- Installation of Variable Speed drives
- Zodiac Pot development to enable Exposed Auto Panel manufacture
- HSM capability development improving flow and enabling increased coil weights
- Rail unloading facility development to handle inbound Coke reducing harbour congestion and transport unit costs
- Cost effective Roll reclamation via Laser Cladding technology
Cost Leadership - Working Better

- Steelmaking Cost reduction
  - Appropriate Product Design in Supply Chain – reducing reliance in high cost alloys
  - Grade rationalisation – reducing complexity and set up costs
- Through supply chain review – eliminating upstream / downstream waste
  - Increased piece weight
  - Stock reduction
  - Appropriate product design
  - Improved product cost modeling and reporting
- Raw materials Value in use
  - Coal Injection rates
  - Local Coals
  - Coal blend rationalisation
  - Waste Utilisation
- Engineering Excellence program
- PIT groups
- Cost Benchmarking Processes
Cost Competitiveness Future opportunity
Margam Mine

• Geological study completed. Final report awaited

• Mine plan and mine schedule complete
  • Measured and Inferred resource of 37Mt
  • Extension potential of a further 30Mt

• Financial evaluation ongoing
  • Coal Value in Use benefit of £5/tonne Hot Metal due to quality

Potential Source of Good quality Coking Coal for 18 – 25 years
Cost Competitiveness - Blast Furnace No4 Development

- Blast Furnace No4 has achieved 30Mt of production since its 1992 rebuild
- Second highest productivity furnace in Europe (15 kt/m3) - world class results
- Typical performance of relined Blast Furnaces are between 12-14 kt/m3
Rebuild Project Scope
Enabling Cost Competitive Iron make

- New furnace electrical and process control systems
- New modern closed circuit cooling system
- New Paul Wurth gearbox
- Casthouse - Clay guns, drills, main trough and manipulators
Operational Excellence - Engineering is Fundamental for TSE to be competitive in the Global Steel Market

Engineering Standards have major impact on process capability and product quality.

Cost base reduction is essential for TSE to be competitive in the Market.

Improved availability will lead to better readiness & service levels.

Engineering Excellence program to increase customer loyalty & improve TSE cost competitiveness.
TSE Engineering Excellence Programme

• TSE Wide programme aimed at improving safety, performance & cost by implementing ‘one company’ best practice standards and processes

• 5 year cost reduction target of £120m. for TSE

**Key Improvement Themes**

**2010 As Is**

- **Asset Integrity** – Poor record - (Explosions, Fires, Loss of Containment....)
- **Unreliable Operations** linked to poorly-maintained assets.
- **Capex** – Allocation & Management not optimised.
- **Fire fighting/short term manufacturing & maintenance culture** leading to equipment under-performance and higher costs.
- **Missed opportunities** through under-sharing of technological expertise.
- **Lack of common KPI’s** to measure, compare and drive performance improvement.
- **People** – Poor Asset Mgt capability & Engineering capability not respected.

**2015 To Be**

- **Asset Integrity** – Reduced loss of containment across HHF.
- **Dependable Operations** - Step change improvement in reliability & availability of bottleneck processes at optimum cost.
- **Capex** – Allocated effectively across TSE, successfully delivered by a shared resource.
- **Continuous Improvement** driven by common KPIs and benchmarking.
- **Technical Centres of Expertise (COE)** – Developed & shared across TSE.
- **People Development** – Focussed on delivering world class Engineering & Maintenance capability.

Organisational Capability is a Key Enabler to Deliver Strategic Priorities
Operational Excellence - Results

1. Caster Prime Slab Yield
   - 2005: 95%
   - 2006: 95.5%
   - 2007: 96%
   - 2008/9: 96.5%
   - 2009/10: 97%

2. Low Cost Carbon Source Usage
   - 2005: 0%
   - 2006: 5%
   - 2007: 10%
   - 2008/9: 15%
   - 2009/10: 20%

3. Blast Furnace GCI Rates
   - 2005: 100 kg/thm
   - 2006: 110 kg/thm
   - 2007: 120 kg/thm
   - 2008/9: 130 kg/thm
   - 2009/10: 140 kg/thm

4. PT HRP Electricity Usage
   - 2005: 60 kwh/t
   - 2006: 70 kwh/t
   - 2007: 80 kwh/t
   - 2008/9: 90 kwh/t
   - 2009/10: 100 kwh/t

5. BF Mothballed
New Products being developed to meet Customer Needs
Overview of TSE NPD phase gate – February 2011

Selection
- Concept
- Attractiveness
  - Gate 0 - Filter

<table>
<thead>
<tr>
<th>Ideas</th>
<th>Small Budget and Resource Commitment</th>
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<tr>
<th>Development &amp; Piloting</th>
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<tr>
<td>Gate 1 - Business case approval.</td>
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<th>Delivery</th>
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<td>Product made effective</td>
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<td>Process made effective</td>
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<th>Launch &amp; Commercialisation</th>
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<td>Gate 2 - Launch decision</td>
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<th>Gate 3 - Post Launch Review (12 months after launch)</th>
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390 Projects in TSE Pipeline, 250 of which require RD&T support
**Advanced High Strength Steel – DP600**

A new technique developed by Zodiac (Patent Applied)

- Capability to produce Advanced High strength steels from zodiac to complete our product package to automotive industry.

- A unique technique developed for zodiac (patent applied) in a very short time with low investment.

- This technique is called OXYMAX, a controlled mixture of N$_2$ and air to selectively oxidise strip.
Strip Products UK Quality Management Approvals and Accreditations

- Accreditation to ISO 17025:2005 – “General requirements for the competence of testing and calibration laboratories” for critical environmental tests.
- Det Norske Veritas’ Rules for Classification Pt. 2 for subsequent manufacture into tubes and sections, structural, boiler and pressure vessel applications.
- Ford Q1 - Supplier excellence standard.
- EU directive 2001/96 and associated “BLU Code” for “Safe Loading and Unloading of bulk carriers” within the harbour area.
Operational excellence
Health and Safety Management System

Policy objective

Planning

Implementation and operation

Checking and assurance

Audit and review

1 Leadership and accountability
2 Competent people
3 Hazard identification
4 Compliance assurance
5 Health and safety planning
6 Risk management
7 Asset management
8 Management of change
9 Managing contractors
10 Operational control
11 Communication
12 Emergency preparedness
13 Learning from events
14 Measuring performance
15 Audit and review
Leadership
Safety and health excellence programmes

• Focus on leadership in health and safety: “Felt leadership”
• Start in 2005: ~ 350 group senior managers
• Follow up by delivery in dedicated areas:
  • Steelmaking, ironmaking – multiple sites
  • Other areas: mills, services, distribution
  • Local versions: e.g. France, Scandinavia
• Key elements:
  • Sponsorship
  • Vertical slice – from works manager to team leader
  • Workshop model leading to personal action

Programme received a UK National Training Award in 2009
Health & Safety
Results 2010/11 H1

Key Health & Safety activities

- Focus on leadership through Leadsafe and felt leadership training remains.
- 650 people through Felt leadership in 10/11
- H&S management system self assessment
- Journey days for employees undertaken. Closing in 2 per employee target
- Safety teams continue to deliver improvements. Work required on consistency
- Process Safety – Good progress with internal HAZOP capability and with HAZOP programme. MOC deployment across operational areas in PT
- Regulator interventions positive
- Top 5 health risks for Business and operational areas identified. Improvement programme being developed.
Our People

• To achieve world class performance, our highly trained, educated and skilled workforce are key.

• Our employees are supported through their careers, with operational training, modern apprenticeships, and higher education.

• The Engineering Doctorate Scheme run in conjunction with the University of Swansea, is developing highly qualified and skilled technical people for the future.

• Integrated Graduate Development Schemes enable close collaboration with local academic institutions allowing skill enhancement of mid-career post graduates.

• Strong links with Westminster & Welsh Governments
Our Environment

• We are committed to environmental care and protection.

• The impact of our operations and products are minimised through the adoption of sustainable practices and continuous improvement.

• We are accredited to ISO 14001, the international environmental management standard.

• We use and recycle by-products on and off site, reducing the amount going to landfill.

• We are an accredited packaging reprocessor by the Environment Agency.

• All our products are recyclable and contain approximately 20% recycled steel.

• We also advise customers and designers on using steel resulting in more sustainable products.
Our Community

• Being a good neighbour and part of the local community is important to Tata Steel.

• Tata Steel supports five core activities; Health & Wellbeing, Education and Learning, Safety Awareness, Diversity, and Environment.

• Tata Steel actively engages with local community events and activities such as the ‘Kids of Steel Triathlon, Cardiff Bay 5, as well as cultural and music festivals.

• We are actively involved in learning and education initiatives including Peer Education, Crucial Crew, and Talkback NP19. We support F1 in Schools design challenge across the UK, and have recently sponsored a radio based Drug and Alcohol Schools Awareness competition.

• Employee volunteering is actively supported by Tata Steel and works in partnership with many external agencies on community projects.

• Tata Steel commits to supporting local charitable and voluntary organisations financially, through its community award scheme.
Thank You