

For Bristol City
Council

BRISTOL
waste

Bristol Waste 10-Year Vision

2027-2038

bristolwastecompany.co.uk





Together we make tomorrow safer,
cleaner and more sustainable.

Foreword by the Managing Director

As Managing Director, I am proud to present this comprehensive report, which outlines our 10-year vision for Bristol Waste Company (BWC) for the period 2027-2038.

This document reflects the hard work and dedication of our team and stakeholders, who have collaborated to create a roadmap for inclusive, sustainable and commercial growth, operational excellence and community impact.

BWC's commitment to environmental sustainability and social value is at the heart of this strategy.



Our ambition to retain and enhance Bristol's position as the leading English core city for sustainability drives our actions.

Our ambition to retain and enhance Bristol's position as the leading English core city for sustainability drives our actions. From implementing innovative waste management solutions to advancing carbon neutrality and supporting the city's dynamic growth, we are aligning our goals with Bristol's evolving needs and environmental and social imperatives.

This report also highlights our key priorities: delivering safe, reliable, and high-quality services; fostering a culture of collaboration and innovation; and investing in technologies and infrastructure to future-proof our operations. Our planned investments – including the relocation of our headquarters, currently on Albert Road, and the development of our Avonmouth site – exemplify our focus on building a resilient organisation that benefits Bristol's residents and businesses alike.

As we embark on this transformative decade, our purpose remains clear – to deliver effective, efficient and economical services that perform at the highest level operationally, promote social equity, and contribute to a cleaner, greener, and more inclusive future. I am confident that with the support of our talented team, committed stakeholders, and forward-thinking partners, we will achieve these aspirations and create a lasting, positive impact for generations to come.

Thank you for your continued trust and collaboration as we work together to make Bristol a city we can all be proud of.



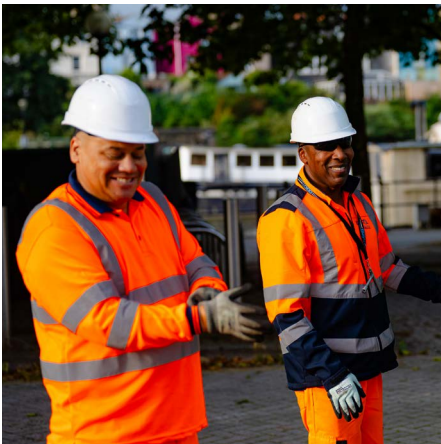
Richard Williams

Managing Director
Bristol Waste Company

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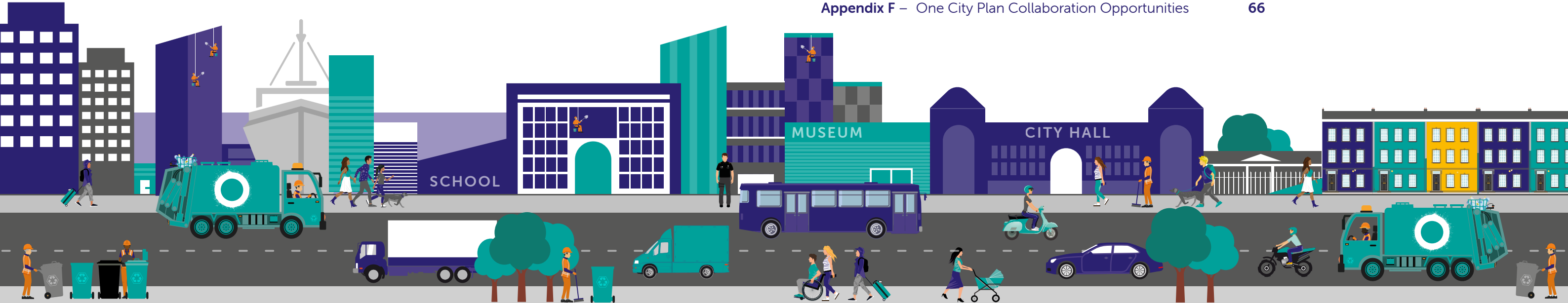
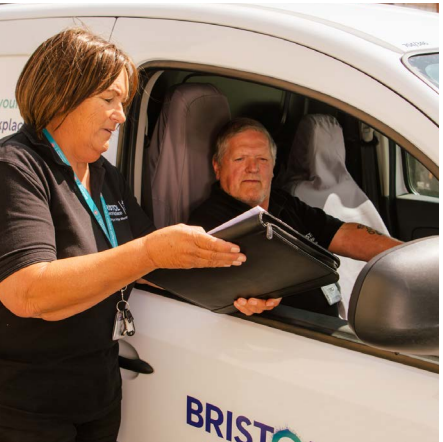
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Executive Summary

Introduction

Bristol Waste Company (BWC), wholly owned by Bristol City Council (BCC), plays a pivotal role in supporting Bristol's ambition to lead among English core cities in environmental sustainability.

BWC is committed to delivering services that are effective and efficient and are performing at the highest level operationally. This strategic vision is for the period 2027-2038 and over this decade BWC is committed to enhancing sustainability, fostering social value, and driving innovation and commercial growth. This aligns with Bristol's broader environmental and One City goals, while addressing the financial challenges faced by the Council.

Vision and Purpose

BWC has launched a new vision and purpose, developed in collaboration with employees and stakeholders.

These clarify our identity and aspirations, and our vision statement inspires, articulating what we want to be and our purpose statement defining why we exist. They underscore our commitment to fostering collaboration, operational excellence, environmental stewardship, and community wellbeing to achieve lasting positive impacts for Bristol and beyond.

Our Vision and Purpose Statements:

- Act as filters for evaluating opportunities, projects, and investments.
- Align to the values and behaviours prioritised within BWC.
- Challenge BWC to think big and innovate to achieve its goals.
- Ensure constancy over time.
- Serve as a unifying message for employees, customers, partners, and investors.

Our Vision

Together we make tomorrow safer, cleaner, and more sustainable.

Our Purpose

Our purpose is to **deliver exceptional environmental and facilities management services.**

Working in partnership with the Council, residents, and businesses, **we make a positive impact** for the people of Bristol and beyond.

Through our commitment to upholding **the highest standards of safety and environmental stewardship**, and focusing on **sustainable practices and innovation**, we seek to improve health and wellbeing outcomes for our customers and colleagues.

Our 10-Year Vision: An Overview

Our Vision

Our Purpose

Our Values

Together we make tomorrow safer, cleaner, and more sustainable.

Our purpose is to deliver exceptional environmental and facilities management services. Working in partnership with the Council, residents, and businesses, we make a positive impact for the people of Bristol and beyond. Through our commitment to upholding the highest standards of safety and environmental stewardship, and focusing on sustainable practices and innovation, we seek to improve health and wellbeing outcomes for our customers and colleagues.

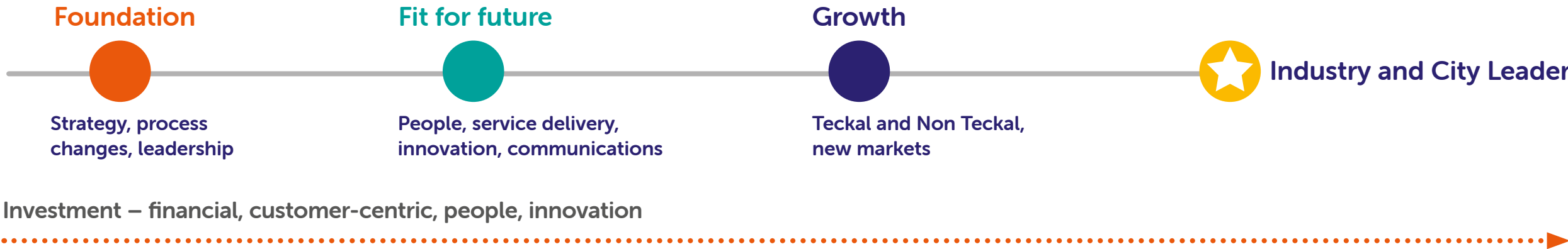
We work together
We do what's right
We communicate
We perform

Strategic Priorities		
	Priority 1: Ensure we are safe	• Our number one priority, cultivating a proactive health and safety culture where everyone goes home safe, feeling good about themselves.
	Priority 2: Deliver for our customers	• Delivering exceptional services that are value for money and embrace innovation.
	Priority 3: Looking after our people	• An employer of choice, investing in our people and fostering an inclusive work culture.
	Priority 4: Grow sustainably	• Scaling up the business, with a focus on reducing environmental impact and generating profit to invest back into the city.
	Priority 5: Support our communities	• A responsible employer, promoting sustainability and wider social value to benefit Bristol communities.

- Transformation
 - Investing in collection and recycling service (including fleet)
- Avonmouth
- Relocation of Albert Road site
- Commercial growth



Where we want to be in 10 years



Strategic Priorities

BWC has identified five key strategic priorities to guide its actions over the next decade:

01	Safety:	02	Customer Delivery:	03	People:	04	Sustainable Growth:	05	Community Support:
<ul style="list-style-type: none">• Cultivate a proactive health and safety culture and strengthen governance.		<ul style="list-style-type: none">• Deliver value-for-money services, drive innovation, and maintain operational flexibility.		<ul style="list-style-type: none">• Become a local employer of choice, invest in leadership development, and foster an inclusive workplace culture.		<ul style="list-style-type: none">• Grow the business through organic and acquisitive strategies while enhancing value for money and investing in future technologies.		<ul style="list-style-type: none">• Reduce environmental impact, promote sustainability, and prioritise social value for the benefit of Bristol's communities.	

Big Ticket Items

To achieve its vision and priorities, BWC will focus on several transformative projects:

1. Recycling and Collection Services: <ul style="list-style-type: none">• Enhance collection and recycling infrastructure, expand material processing capabilities, and implement data-driven collection methods.	2. Avonmouth II Development: <ul style="list-style-type: none">• Upgrade the facility to increase throughput for commercial growth, improve health and safety, and integrate advanced recycling technologies.	3. Albert Road Planning: <ul style="list-style-type: none">• Transition to modern facilities that support operational excellence and align with Bristol's sustainability commitments.	4. Business Growth: <ul style="list-style-type: none">• Grow the business, diversifying revenue and ensuring compliance while reinvesting profits into services that benefit Bristol residents.
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Financial and Technological Investments

BWC vision includes investment in our fleet, operations, processing and systems.

We are an agile business, adopting innovative approaches to enhance productivity so that we can deliver an exceptional service for the people of Bristol and beyond.

In Summary

BWC's 10-year vision sets a clear roadmap for inclusive and sustainable, operational excellence, and community impact.

By embedding sustainability into its core operations and leveraging innovative technologies, BWC is poised to meet Bristol's evolving needs and contribute to a cleaner, greener, and more equitable future for all.

Summary Overview

The Bristol Waste 10-Year Vision (2027-2038) asserts our commitment to delivering high-quality, value-driven services that solidify Bristol's position as the top recycling core city in England. As a Teckal company wholly owned by Bristol City Council, we will collaborate decisively with our stakeholders and clients to establish a company that Bristol can truly take pride in. Together, we are determined to make tomorrow safer, cleaner, and more sustainable.

Our vision lays out a clear path for delivering exceptional environmental and facilities management services through strong partnerships with the council, residents, and businesses. We are here to make a lasting, positive impact for the people of Bristol and beyond. Our unwavering dedication to the highest standards of safety and environmental stewardship, coupled with our focus on sustainable practices and innovation, will significantly enhance health and wellbeing outcomes for our customers and colleagues.

We are poised for an ambitious future at Bristol Waste, confidently building on the solid foundations laid by our transformation programme. Our focus is on creating a business that is unmistakably 'fit for the future', with plans to expand both our Teckal and Non Teckal operations, positioning ourselves as a definitive leader in the city and industry.

BWC operates in a changing external environment with new legislation and ambitious City and UK targets. By navigating these external factors effectively over the next decade, BWC aims to remain resilient, ensure compliance, and meet the evolving needs of BCC and customers while maintaining its commitment to environmental sustainability and public wellbeing.

This vision defines our trajectory for:

- **Financial Sustainability:** We will grow our Teckal and Non Teckal businesses by investing in our employees, facilities, fleet, systems, and processing capabilities, ensuring that we deliver efficient and effective services to our municipal and commercial clients.
- **Environmental Sustainability:** We are committed to driving the city's efforts to minimise waste, recycle, and reuse materials, thereby significantly reducing carbon emissions and environmental impacts through innovative service offerings.
- **Social Sustainability:** We are determined to become the employer of choice, where embody our values ('we work together', 'we do what's right', 'we communicate', 'we perform') and delivering broader social value for Bristol and beyond.

Strategic Priorities:

To guide our approach, we have established Strategic Priorities:

- **Priority 1: Ensure we are Safe** – number one priority, managing risk and governance and control.
- **Priority 2: Deliver for our Customers** – value-for-money, innovation and flexibility
- **Priority 3: Looking after our People** – employer of choice, leadership and development and culture and engagement.
- **Priority 4: Grow Sustainably** – commercial growth, value-for-money and investment.
- **Priority 5: Support our Communities** – environmental impact, sustainability goals and social value priorities.

The following 'Big Ticket' items represent transformative opportunities for the business that will enable us to achieve our long-term vision:

Big Ticket Items:

- Investing in Recycling
- Avonmouth
- Relocation of Albert Road
- Commercial Growth

Strategic Themes:

- **Governance and Control:** Ensure value-for-money, innovation, and flexibility.
- **Commercial Growth:** Focus on growing the business sustainably.
- **Environmental Impact:** Achieve sustainability goals and prioritise social value.

Benefits of a Teckal Company:

- **Exemptions from Procurement Rules:** BWC can be directly awarded contracts by Bristol City Council.
- **Control and Flexibility:** The Council maintains control over BWC, ensuring alignment with its objectives and standards.
- **Cost Efficiency:** Achieve cost savings through shared services and economies of scale.
- **Risk Management:** Risks can be ring-fenced, protecting the Council's broader financial health.
- **Innovation and Commercial Opportunities:** Operate with a more commercial and entrepreneurial approach, generating additional revenue.
- **Cultural Change and Service Improvement:** Foster innovation and improve service delivery by adopting best practices from both the private and public sectors.



Together, we are determined to make tomorrow safer, cleaner, and more sustainable.

Part 1: Our Company

1.1 Who are We?

Bristol Waste Company (BWC) is a Teckal company owned by Bristol City Council delivering environmental and facilities management services for the people of Bristol and beyond.

With a turnover of £70m and approximately 850 employees, we collect and process recycling and waste from every home, clean every public street, operate Household Reuse and Recycling Centres, remove graffiti, grit the roads, clear fly-tips, and provide cleaning and security.

We have an expanding commercial section, serving businesses and organisations in Bristol and across the region with services that covers waste collection, processing and recycling, facilities management, cleaning, security, cash in transit and IT reuse.

With local operations and local staff, we are best positioned to understand the needs of the City and provide a core service that delivers the best value, aligned to the City's priorities delivering the greatest wider social impact. We are part of Bristol One City and are committed to creating a fair, healthy and sustainable city, a city of hope and aspiration where everyone can share in its success.

Our aim is to provide good quality, value-for-money services for the people of Bristol. Bristol has the highest recycling rate of any English core city. We are recognised nationally as sector leaders, having won numerous sustainability and business awards.

Our services include:



Waste Management



Recycling Services



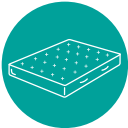
Facilities Management



Security Services



IT Reuse



Fly-tip Removal



Street Cleansing



Graffiti Removal



Road Gritting



1.1.1 Our History

From our inception in November 2015 as a pioneering Teckal company, BWC has introduced impactful innovations, including electric vehicle adoption, food waste recycling, and street improvement projects.

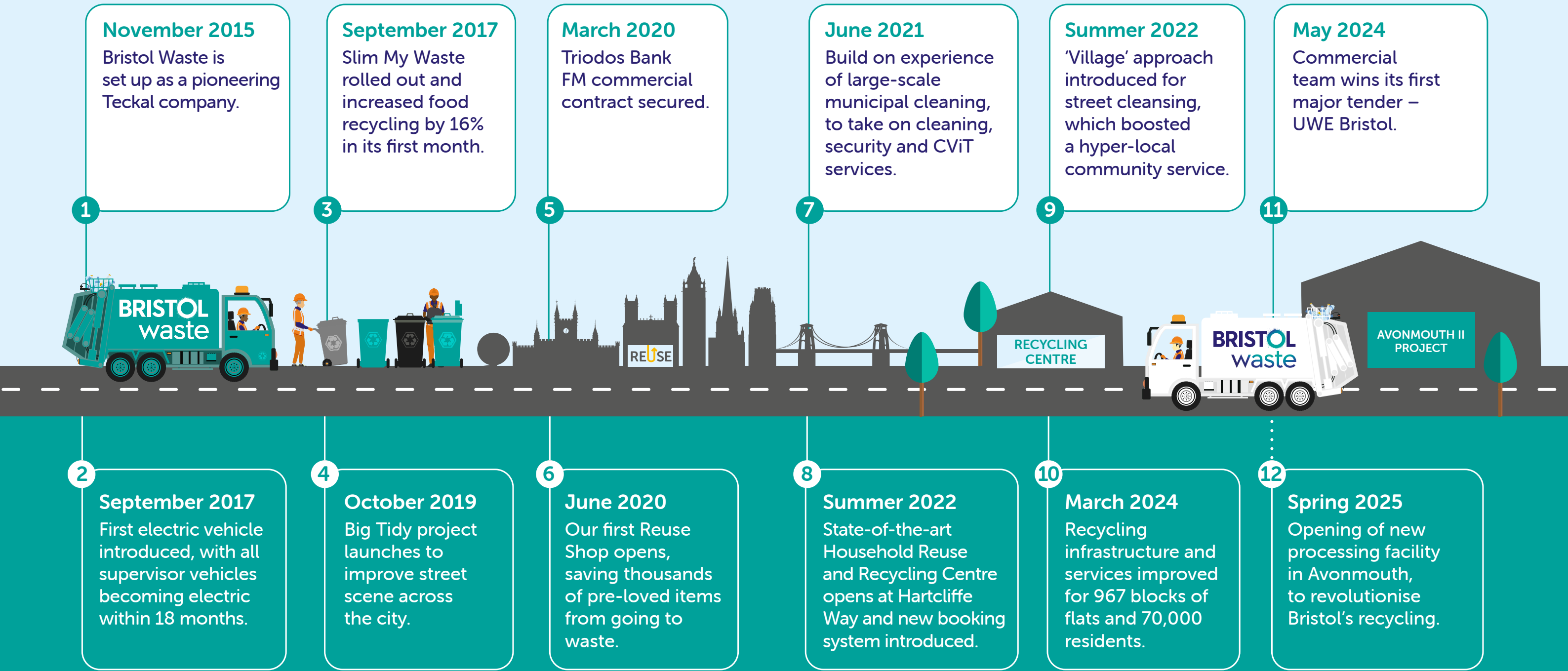
Key milestones such as the launch of Reuse Shops, two new household recycling facilities, and large-scale municipal cleaning initiatives, showcase the company's commitment to environmental responsibility and community wellbeing.

As we look toward the future, developments including the Avonmouth processing facility in Spring 2025 promise to further transform Bristol's recycling infrastructure, ensuring cleaner, greener, and smarter solutions for the city's residents. This 10-year vision builds on the BWC journey to date to create a more sustainable, waste-free future for Bristol.



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Key Achievements



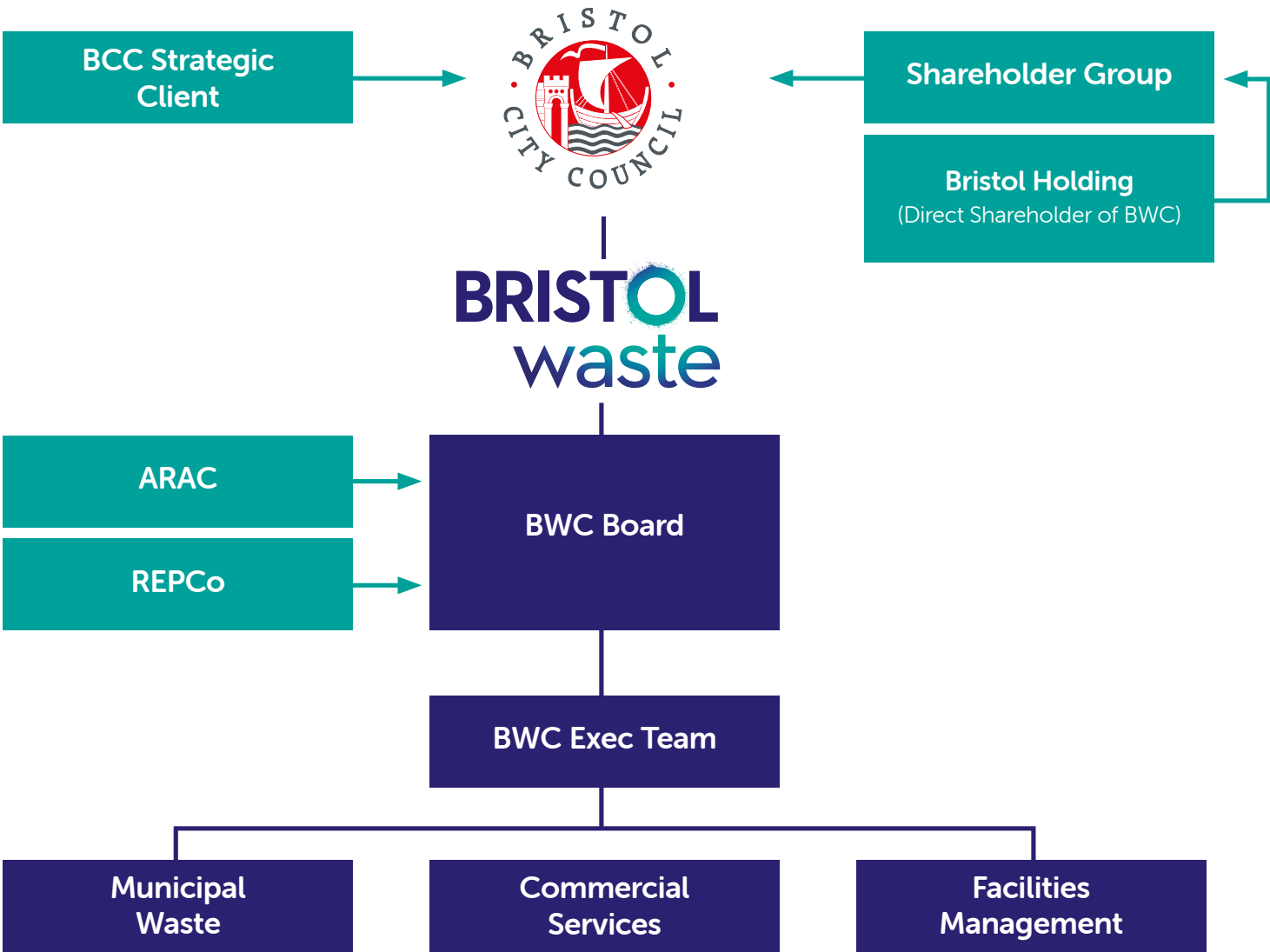
1.1.2 Ownership and Structure

Bristol City Council (BCC) is the ultimate shareholder of BWC.

Bristol Holding Limited (BHL) is the parent company for Bristol Waste Limited and Goram Homes Limited. As a Teckal company, the structure offers many benefits to the Council. The 'Teckal exemption' means BCC can directly award contracts for services to BWC, providing 80% of trading is for BCC (non-commercial). It can trade commercially with the other 20%. This approach leads to significant cost savings and operational efficiencies through shared service delivery.

As its owner, BCC retains control over the company, ensuring that services align with policy objectives. Additionally, BWC can engage in commercial activities to generate extra revenue where projects can be re-invested into the service and city, and manage risks effectively by operating as a separate legal entity.

Governance and Organisational Structure



 This approach leads to significant cost savings and operational efficiencies through shared service delivery.

Bristol City Council (BCC) – is the ultimate Shareholder of BWC. Each year we submit our business plan for approval and when required take policy decisions via the Council’s decision pathway.

Shareholder Group (SG) – this is a group that advises the Council in its role as Shareholder, by reviewing performance and risk and receiving assurance of all its companies. It approves business plans before submission to the Strategy and Resources Committee for formal approval.

Bristol Holding Company (BHL) – the Council’s directly owned businesses feed into this umbrella company. It provides assurance to BCC’s Shareholder Group on company health and progress against business plans. It also manages the group-wide tax structure and other financial arrangements (such as auditor appointments).

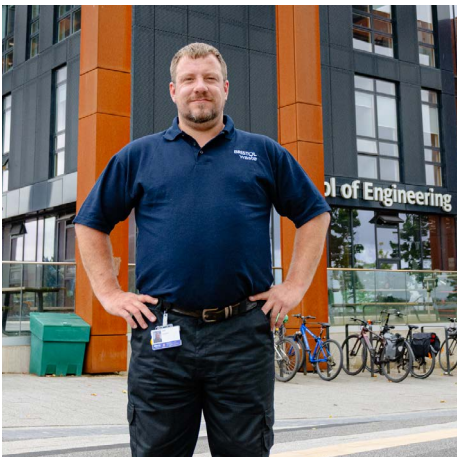
Strategic Client (SC) – the Council’s Executive Director: Growth and Regeneration, who is responsible for holding a strategic perspective on the business from the Council’s perspective, which includes clarifying strategic objectives and performance requirements with the company. We work together to tackle issues and to ensure we keep strategically aligned to what our Shareholder wants. The Strategic Client is a key advisor to the Council as Shareholder, including at the Companies Assurance, Shareholder Group and at relevant Committees.

Bristol Waste Company (BWC) – delivers Teckal and Non Teckal services and has three divisions: municipal waste, commercial services and facilities management.

The Board – sets the strategic direction of the business and is made up of Non-Executive and Executive Directors. It provides challenge, strategy, scrutiny and assurance.

We provide our own company assurance via the BWC Board; the Remuneration, EDI, and People Committee (REPCo) and Audit and Risk Assurance Committee (ARAC). REPCo and ARAC are Board committees. They review areas in detail and make recommendations to the Board.

The Executive Team – in partnership with the Board, the team set the company’s vision and strategy and leads the company.



1.1.3 Our Services

BWC has continually expanded its service offer to meet the needs of the people of Bristol since 2016.

BWC has continually expanded its service offer to meet the needs of the people of Bristol since 2016. Delivering both Teckal and Non Teckal services, we are positioned to meet the demands of every household, civic building and civic space in addition to providing commercial services. Currently, 89% (2024/25) of business is with Bristol City Council, our strategic client. Our Non Teckal offer continues to grow with clients including Triodos Bank, We the Curious, UWE Bristol and Nuffield Health.

BWC offers the following services:

Teckal	Non Teckal
Municipal Waste Collection and Processing <ul style="list-style-type: none">• Recycling collection and processing• Refuse collection and processing• Fleet management• Household Reuse and Recycling Centres• Reuse Shops• Container delivery• Bulky waste collection• Clinical waste collection• Green waste collection Street Cleansing <ul style="list-style-type: none">• Graffiti removal• Street sweeping• Fly-tip removal Soft Facilities Management <ul style="list-style-type: none">• Cleaning and housekeeping services (internal and external)• Security services• Pest control services• Service coordination Winter Maintenance	Commercial Waste and Recycling <ul style="list-style-type: none">• Waste transfer and Processing• Collection• IT Reuse Soft Facilities Management <ul style="list-style-type: none">• Security• Cleaning• Cash and Valuables in Transit

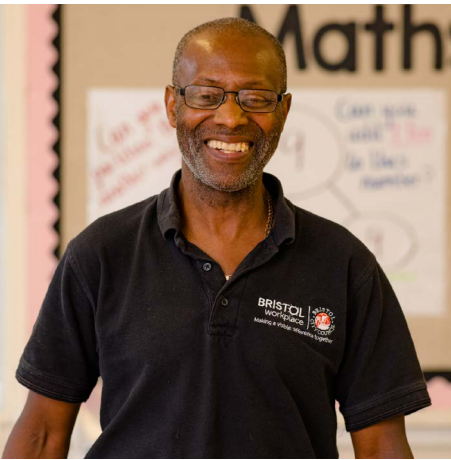
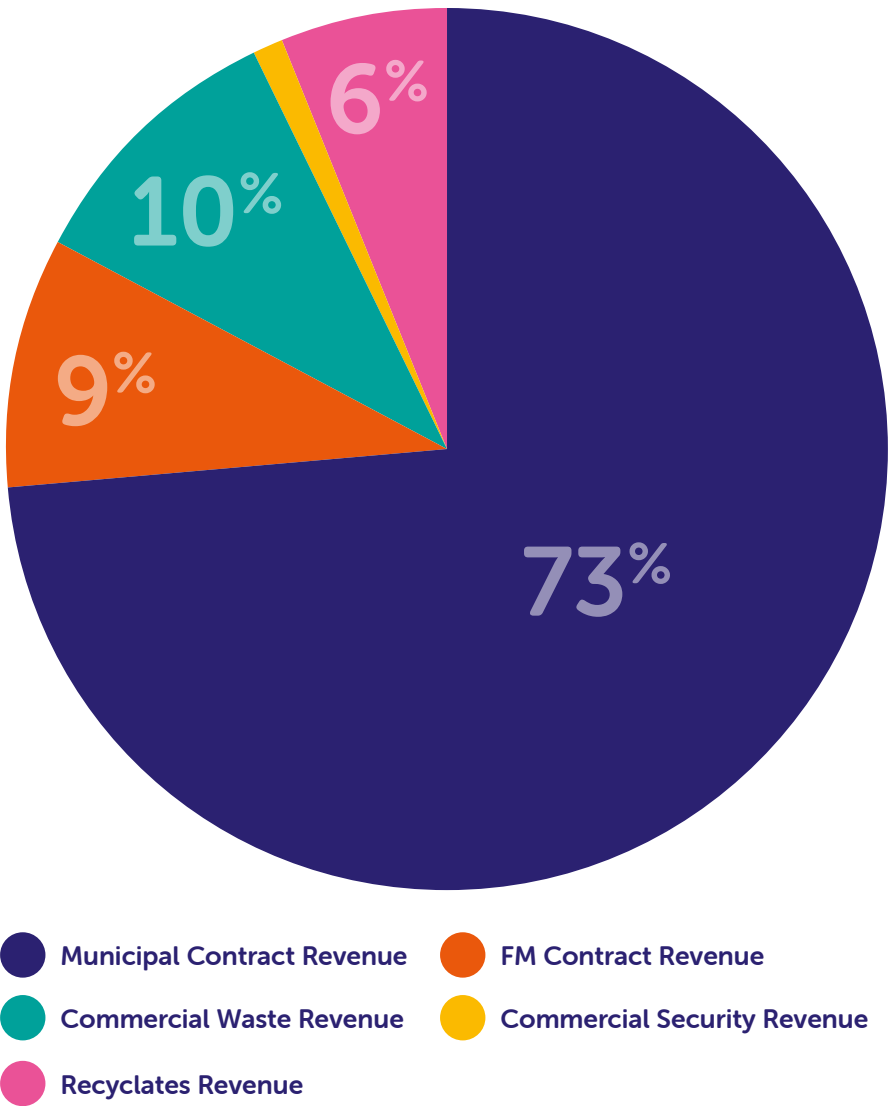
Increasingly businesses are reporting against the triple bottom line – with KPIs (Appendix A) that include profit, people and planet. They come to BWC, attracted by our commitment to value-for-money quality service and our focus on delivering social impact. In addition to paying a Real Living Wage and providing approximately £21.6 million in social value per annum, we are committed to a circular economy, with our Reuse Shops, IT Reuse Scheme, and behaviour change projects, helping Bristol and beyond waste nothing.

BWC’s focus on service innovation means that we explore ways in which we can make the Council savings through, for example the ‘village’ approach and providing facilities management services. We use technology such as the newly adopted PurGo system which for example helps identify the most fuel-efficient routes possible, and our cleaning products are environmentally friendly.

Looking ahead over the next decade, we will continue to grow the business by leveraging our unique public sector partnership model to expand service offerings, invest in sustainable and innovative technologies, and build strategic collaborations that meet evolving community needs while maintaining our competitive edge in delivering cost-effective solutions.

1.1.4 Our Core Revenue 2024-25

Bristol Waste Revenue 2024-25





1.2 Benefits of Being a Teckal Company

Bristol Waste Company (BWC) is a Teckal company owned by Bristol City Council. This structure offers Bristol City Council, our shareholder and strategic client, several advantages.

- **Collaboration on shared priorities:** BWC regularly collaborates with officers and councillors sharing intel and resources to overcome shared challenges and maximise opportunities.
- **Cost Efficiency:** As a Teckal Company, Bristol Waste can provide services directly to the Council without the need for competitive tendering, which can save time and reduce procurement costs.
- **Service Control:** The Council retains significant control over Bristol Waste, ensuring that the services align closely with local priorities and standards.
- **Revenue Generation:** While primarily serving the Council, Bristol Waste can also engage in limited commercial activities (up to 20% of turnover), generating additional revenue that can be reinvested into local services.
- **Flexibility and Responsiveness:** Bristol Waste can be more agile in responding to the needs of the community and adapting to changes in policy or demand.
- **Community Engagement:** Bristol Waste actively engages with the community to promote recycling and waste reduction, supporting the Council's environmental and sustainability goals.

We are committed to maintaining a robust and transparent governance structure that ensures accountability, efficiency, and alignment with our strategic objectives. Our governance framework is designed to support effective decision-making, foster stakeholder trust, and drive sustainable growth.



"Across the country, councils are struggling to maintain essential services in the face of relentless cost increases, skills shortages and increased demand on services. There have been several media reports about the financial pressures faced by councils..."

Given this backdrop, it is perhaps no surprise that there is a groundswell of interest in, and enthusiasm for, local authority trading companies"

Justin Galliford

'Is a LATCo the best model for waste services?'
MRW, 24 March 2024





1.2.1 Contributing to Council Finances

As a Teckal company we have focused on absorbing costs and achieving operational efficiencies to address the financial challenges faced by the Council, all while ensuring we deliver value for money.

Since 2014 we have delivered £5.5m of efficiencies. We continue to do all we can to ensure a viable business for the Shareholder whilst delivering value for money to the taxpayers of Bristol.

This has included:

- The absorption of additional Bristol housing (c. 20,000 new homes).
- Absorption of £750k per annum for the running of Hartcliffe Way Household Reuse and Recycling Centre (HRRC).
- Part-funded the capital cost of delivering the Hartcliffe Way HRRC.
- Making operational improvements such as reducing sickness, reducing agency spend and reduced management overheads.

Supporting our work to drive efficiencies is a commitment to grow our Non Teckal work, currently valued at £7.3m for the financial year 2024/25. This approach will bolster our efforts to enhance the Council's finances over the next decade.



By diversifying our service offerings and generating additional revenue streams, we can better ensure financial stability and continue to deliver quality services to our community.

Contracts with Bristol City Council account for 89% of our turnover, as we look forwards over the next 10 years, we will grow our Non Teckal business to 20% and beyond by taking on further Teckal services from BCC and if necessary, re-structuring the company.



1.2.2 Partnership Work with Bristol City Council

BWC works as one with the Council, and it is through this partnership approach that we can deliver our joint goals and meet our shared challenges.

Collaborative working between the Strategic Client and BWC means that together we can realise the objectives of both organisations, for the benefit of the city and its people.

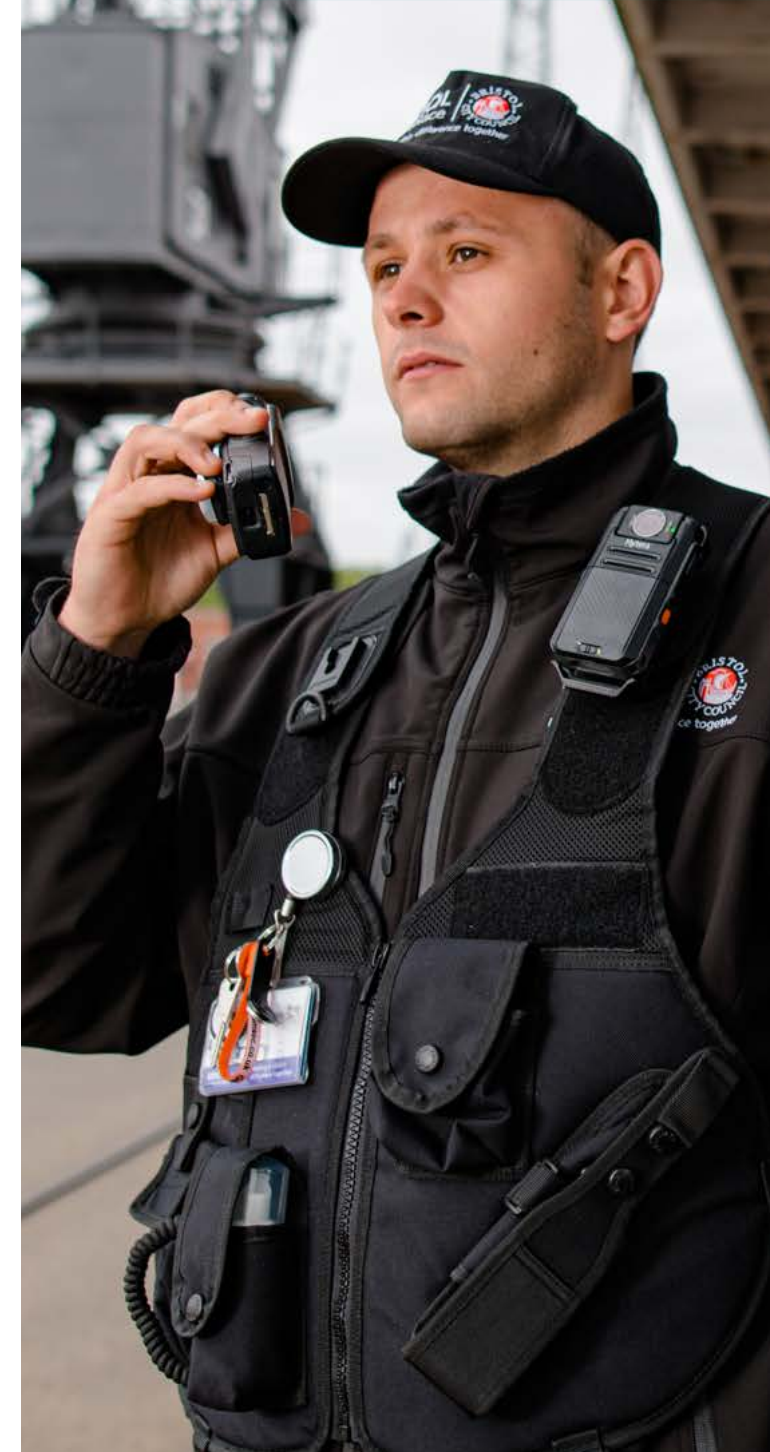
In addition to delivering value-for-money services that are central to the contract, BWC provides:

- The ability to adapt and change in response to the city's requirements.
- A close working relationship between the Managing Director and Exec Team members and Council stakeholders, keeping them fully informed and engaged.
- Added-value projects delivered in partnership with the Council, for example the Digital Inclusion Scheme and the Big Tidy.
- Flexibility on service delivery and support for ad hoc and short notice requests.
- Social value at an estimated total of £21.6m in 2024.
- The open sharing of key information with Council officers and Councillors, including the BWC website 'Councillor portal' and Councillor newsletter.

By working together, we create a solid footing to tackle the external financial and sustainability challenges head on over the next decade.



BWC and the Council want the best for the city, its residents, businesses and visitors and are both passionate about achieving our joint sustainability goals.





1.2.3 Benefit to Bristol Residents

What BWC does is important not only for BCC, but also the city's residents, workers and visitors.

BWC keeps the city clean and safe, makes the lives of people living and working in our city, better, and helps to deliver the city's sustainability targets.

As a company owned by the city, BWC is committed to providing good quality, value-for-money services, reducing waste and increasing recycling, and that helps everyone.

It is good for the environment and the city, and good financially. We drive behaviour change to help residents and businesses to waste less. We are helping BCC, and the UK Government achieve sustainability and carbon net zero targets.

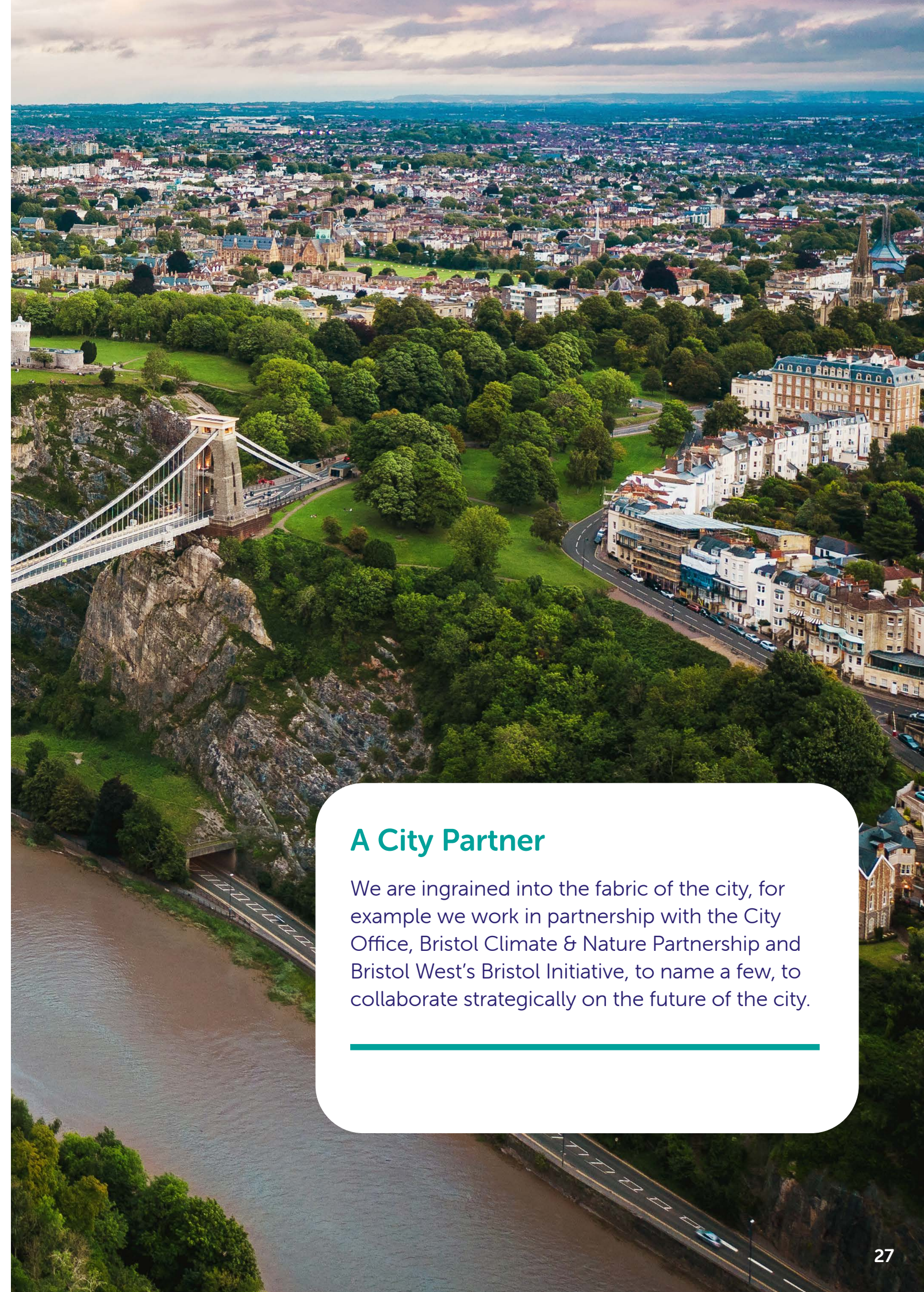
Through close partnership working, BCC and BWC can be more dynamic in addressing the needs of the city and its people.

BWC can tailor our support for communities, working closely with the Council, in a way that would not be achievable by an outsourced company focused on delivering profit for shareholders.

Some of the ways we uniquely contribute to Bristol:

- Our engagement teams delivered **10,500 community activities** and visited 1,390 streets to support behaviour change and improve environmental outcomes. A total of 3,310 students and community groups attending BWC talks. We also worked with UWE Bristol students, who generated campaign ideas through our Course Connect partnership.
- We look after our people, and in 2023 we **delivered 3,760 apprenticeship hours**, trained seven mental health first aiders, bolstered our wellbeing offer, developed new values as part of our drive to build a new and better culture, and created new colleague-centric policies.
- In 2023, **4,000 bags of litter were collected through community litter picks** and **91 residents and businesses made Big Tidy pledges** to bring the sparkle back to Bristol. The Little Big Tidiers scheme for children is being rolled out to include schools and nurseries.
- **We refurbished 3,118 IT items** in 2023 and donated or sold them to help tackle digital poverty, supporting individuals, charities and marginalised communities.
- In 2023 more than **52,000 items were diverted from going to waste via our Reuse Shops**, including 410 mobility aids and 3.3 tonnes of paint.

In October 2024 BWC commissioned Ragdoll Research to undertake a survey with 256 residents across the city into their attitudes towards waste and recycling and their behaviours. Of those surveyed 80% agreed with the statement that they thought the recycling crews did a good job. Findings from this research will help inform ambitious behaviour change projects planned for 2025 and beyond.



A City Partner

We are ingrained into the fabric of the city, for example we work in partnership with the City Office, Bristol Climate & Nature Partnership and Bristol West's Bristol Initiative, to name a few, to collaborate strategically on the future of the city.

1.3 External Environment

By navigating external factors effectively over the next decade, BWC can remain resilient, ensure compliance, and meet the evolving needs of our shareholder and customers while maintaining our commitment to environmental sustainability and public wellbeing.

We are currently operating in a changing external environment with lots of new legislation and ambitious City and UK targets to respond to – it is an exciting and challenging time.

PESTEL

Political	Economic	Social
<ul style="list-style-type: none">• Local Authority Funding: Under continued significant pressure.• New Local Governance Committee System: Changes ways of working with Council.• Changing Role of the Combined Authority: Greater devolved powers.• Change in National Government: Focus on economic growth. Nationalisation of public services. Reintroduction of mandatory housebuilding.• Employment Rights Bill: Focus on banning zero hours contracts/ fire and rehire/ parental sick leave from day one/ strengthening statutory sick pay.• Local Investment in Cycle and Bus Infrastructure: Manage operations within low-traffic neighbourhoods.• Ongoing support for Bristol One City: Continued buy-in for public, private and VCSE sector collaborations.	<ul style="list-style-type: none">• Financial Performance: Maintain growth despite national changes e.g. Employer NI.• Avonmouth II: Leverage new facility for resilience and commercial opportunities; explore further expansion at Avonmouth.• Cost Management: Navigate rising borrowing costs and goods prices.• Recruitment: Address challenges with low unemployment and higher wages.• Service Funding: Adapt to increased demand with limited local authority funding.• Business Stability: Ensure stable turnover despite broader economic challenges.• Supply Chain: Mitigate disruptions and capitalise on opportunities.• Emissions Trading Scheme: Prepare for significant payments (£5-9m) impacting finances from 2028.	<ul style="list-style-type: none">• Adapt Workforce: Embrace generational shifts, higher expectations, and flexible working.• Support Ageing Demographics and those with Disabilities: Cater to older workers and senior consumers; and increasing percentage of people with disabilities.• Drive Change: Lead in environmental sustainability, social value, and equality.• Manage Changing Waste Stream Trends: Address increased waste and cardboard post Covid.• Mitigate Cost-of-Living Impact: Support customers and residents, and manage increase in Houses of Multiple Occupancy (HMOs) in the city.• Adapt to University Growth: Manage impacts on local communities.• Plan for City Growth: Prepare for Bristol's population reaching 493,400 by 2028.• Embrace Diversity: Serve and employ a diverse population with over 91 languages spoken.• Just Transition: Adopt the principles of a Just Transition.
Technology	Environment	Legal
<ul style="list-style-type: none">• AI Opportunities: Harness AI for innovation and efficiency.• Data Security: Ensure secure and ethical data use.• Productivity: Boost efficiency with robotics.• Health and Safety: Enhance health and safety and welfare with tech solutions.• System Integration: Streamline operations with integrated tech.• Decision Support: Use real-time data and tech for informed decisions.• Predictive Maintenance: Implement AI-driven maintenance with human oversight.	<ul style="list-style-type: none">• Climate and Nature Targets: Meet ambitious goals.• Recycling Rates: Improve and maintain top recycling status (rates stagnating).• Clean Air Zone: Comply with fleet and workforce adjustments.• 'Simpler Recycling': Implement clear requirements, including soft plastics.• Producer Responsibility: Adapt to new regulations.• Deposit Return Scheme: Adjust to changes in recycling collection.• St Philip's Regeneration: Manage relocation challenges and opportunities.• Liveable Neighbourhoods: Adapt collections for pedestrian-friendly areas.• City Centre Pedestrianisation: Develop solutions for collection challenges.	<ul style="list-style-type: none">• Environmental Compliance: Adapt our permissions, operations and customer behaviours to meet stricter environmental laws.• Worker Rights: Ensure compliance to foster a positive working environment.• Union Relations: Operate effectively within our trade union recognition agreements.• Health and Safety: Ensure compliance to protect the health and wellbeing of our employees and all those we impact.



Climate

Climate Change Act adds another layer of responsibility through its legally-binding carbon budgets, which set limits on the total greenhouse gas emissions the UK can produce over specific five-year periods.

The UK Government's Net Zero Strategy aims to achieve net zero greenhouse gas emissions by 2050. This ambitious target will likely involve stricter regulations on waste management practices to reduce carbon footprints.

Locally, Bristol's One City Plan sets an even more ambitious goal of achieving carbon neutrality by 2030. This plan includes a range of initiatives aimed at improving reuse and recycling rates, reducing waste generation, and enhancing sustainability practices across the city.

Bristol has since published its Bristol's Climate City Contract (CCC) which was co-created with BWC as part of the Mission Net Zero Transition Team and outlines the city's action plan to achieving carbon neutrality by 2030, emphasising the importance of waste management in this endeavour.

[See Appendix E for summary of key changes up to 2035.](#)

BWC's Sustainability Strategy and Plan

At time of writing (January 2025) we are developing our Sustainability Strategy which sets out our commitment to people, planet and profit.

We know in 2025-2027 we will need to work with the Council on our Sustainability Plan to evolve our waste management systems to meet national and local recycling and waste reduction targets. Both BWC and BCC are driven by the recognition that waste makes a big contribution to the climate emergency.

Delivering social value for the people of Bristol is integral to Bristol Waste since its inception as a Teckal company business.



We were set up to make a difference to people's lives and social value has always been at the heart of what we do.

As a city leader within the City Partnership, it is important that we are a responsible corporate citizen. In October 2024 BWC onboarded Social Value Portal which uses the Social Value TOM System – the leading standard used by government and businesses.

Developed with organisations across the public, private, and third sector, the TOM System provides a robust and standardised approach to measuring positive impact.

We are maturing our approach and are aligning our efforts to the Social Value portal and TOMS. This gives our Strategic Client, BCC, and our commercial clients assurance that our approach is trusted and robust.



1.3.1 Our Performance against Core City Comparators and West of England Neighbours

Bristol performs well in terms of recycling rates compared to core city comparators but has lower recycling rates in comparison to our neighbouring West of England authorities.

Our strong performance in comparison to other core cities is due to our collection method (for example we separate at kerbside and collect food waste), the success of our communications and engagement work, the demographics of the city and our 'Bristol spirit' – we are a leader in environmental and sustainability initiatives.

Our lower performance compared to our neighbours reflects our different demographics, urbanisation, population density. As a core city, with a high population density, high number of collections, high nighttime economy etc, we have specific challenges which our neighbours do not experience.



As we move forward, we will need to keep pushing to innovate and extend the services we provide and continue to develop behaviour change and engagement with the people of Bristol and beyond to keep our status as number one English core city and meet our, local, and national targets and legislation requirements.

We can learn from our neighbours as they introduce new collection methods and materials with Simpler Recycling and move to reduce the frequency of their refuse collections (South Gloucestershire and North Somerset have confirmed the change, in 2026 and 2025 respectively).

Recycling Performance - 22/23 Defra Figures

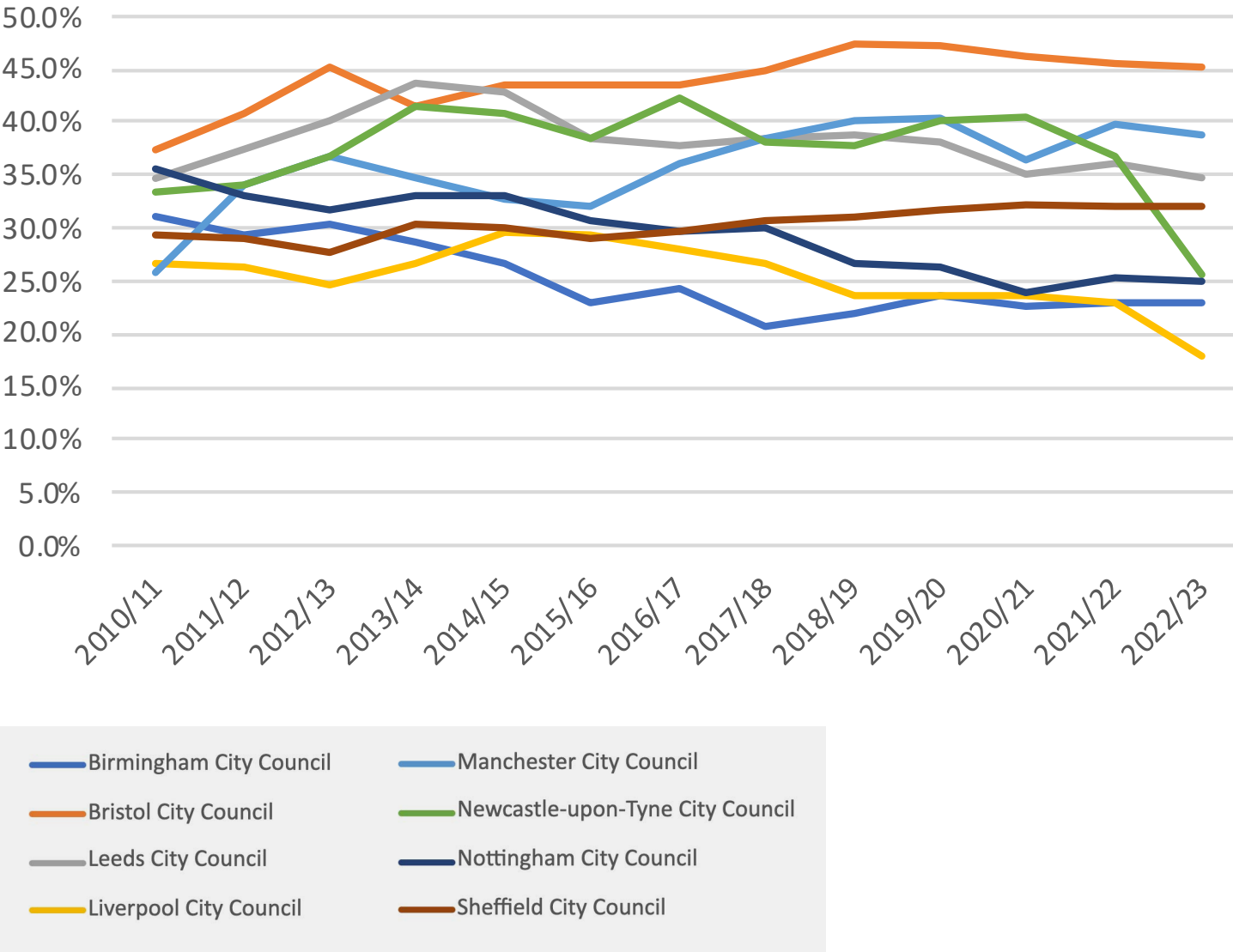
Core Cities

- Bristol is the highest performing core English City (45.1%)
- 6.3 percentage points above 2nd highest (Manchester, 38.8%)
- Range within English Cities is 17.9% – 45.1%
- Compared with all UK core cities, Cardiff is the only city with a higher recycling rate (62%). We are performing better than Glasgow (27.2%) and Belfast (40.8%)

West of England Neighbours

- Bristol has the **lowest recycling rates (45.1%)**
- Highest performing area is South Gloucester Council (58.6%)
- We are 11.8 percentage points below the next lowest (BANES, 56.9%)

English Core City Recycling Rates



1.3.2 ‘One City’ Aspirations

The ‘One City’ aspirations are part of a collaborative effort to unify and advance the city’s social, economic, and environmental goals.

This initiative seeks to harness the collective potential of the city’s communities, local government, businesses, and organisations to create a cohesive vision for the future. BWC is a strategic partner and is a City Partner in addition to being a member of the Environment Board. BWC will continue to provide strategic civic leadership as a City Partner, hold positions within One City Boards and take part in task and finish groups and projects to adopt a multi-agency approach to develop goals and provide subject matter expertise on waste management, facilities management and street cleanliness.

See below for key One City targets that are of relevance to us at BWC over the next 10 years:



The One City Plan is aligned with the UN Sustainable Development Goals. BWC is a member of the UN SDG Alliance, collaborating to adopt best practices across the city. The Bristol Good Food Strategy and Action Plan are also aligned with the One City Plan. We support their goal to waste less and redistribute more.

The One City Plan

- The Bristol One City Plan is a citywide strategy to transform Bristol into a fair, healthy and sustainable city of hope and aspiration by 2050.
- The plan also aligns with the United Nations Sustainable Development Goals (SDGs), addressing global challenges at a local level.

Launched in 2019, it focuses on seven key themes:

- Children and Young People
- Culture
- Economy and Skills
- Environment
- Health and Wellbeing
- Homes and Community
- Transport

- Each year, the plan sets specific goals for each theme, developed collaboratively by stakeholders from various sectors, including public, private and voluntary organisations. This ensures a holistic and inclusive approach to the city’s development.
- The last iteration of the One City Plan (One City Plan 2023) identifies opportunities for BWC to collaborate with the city.



Part 2 – Our Longer-term Vision

2.1 Council Guidance for our 10-Year Vision

The Council's ambition is to retain and enhance its status as the leading English core city for environmental sustainability, minimising resource consumption wherever possible, which offers value-for-money and environmental sustainability.

As a company wholly owned by the Council, we aim to be the Council's flagship delivery vehicle for achieving these outcomes for the city, support the Council to operate in the financially challenging environment that BCC and other Councils are in and deliver a high-quality service.

In producing this 10-year vision BWC has engaged with the Council's strategic client and leadership team who have provided some guidance on contract expectations and assumptions, recognising that there is ongoing work with the Council's Environment and Sustainability Committee regarding the city's waste strategy, with this having a direct outcome on the Council's waste contract requirements. At the time of writing (Jan 2025) public engagement, consultation and involvement is being developed to support this work.

We are aligned on key service assumptions and recognise that there are many Council and political decisions that will determine requirements of BWC during this period.

For the purposes of this strategy, we have incorporated the following assumptions to support our strategy and financial plan:

Waste Management Assumptions:

- Continue with a kerbside recycling service.
- Use of 2018 population projections for Bristol.
- Procurement of a new fleet in 2027/2028 with an aspiration for the fleet to be electric or hydrogen-powered.
- New depot(s) for BWC to come online in 2028 as required to move out of the Albert Road site due to development of the St Philip's area.
- New West of England waste disposal contract in 2030 (or extension).
- New food waste contract in 2028.
- Introduction of Emission Trading Scheme in 2027.

Waste management options for future:

- Set out options to evolve waste management systems to meet national and local targets and minimise impact of national tax changes that will push up disposal costs.

Facilities management:

- Adapt service requirements to support corporate landlord asset rationalisation, non-statutory building closures and reduced hours in statutory buildings.
- Manage decline of cash service as locations and cash usage reduce.
- Focus on providing a reliable FM service.
- Use strength in this area to support BWC commercial growth.
- Reset contract following initial transfer of services to ensure alignment.

2.2 Vision and Purpose

Our long-term planning is guided by our vision, purpose and values.

Our Vision

Together we make tomorrow safer, cleaner, and more sustainable.

This vision, developed in collaboration with our employees and stakeholders, reflects our collective commitment to a better future for Bristol and beyond. By working together to maintain a clean city, protect our communities, and prioritise sustainability, we aim to create a Bristol that we can all take pride in – today and for generations to come.

A clear vision is essential for the next decade as it provides direction and purpose, guiding our actions and decisions. It ensures alignment of our efforts, with everyone working towards the same objectives. This shared vision fosters collaboration and innovation, enabling us to address challenges more effectively. Furthermore, it inspires and motivates our team, stakeholders, and the community, reinforcing our dedication to making Bristol a cleaner, safer, and more sustainable place.

At BWC, we're proud to introduce our new purpose:

Our Purpose

Our purpose is to **deliver exceptional environmental and facilities management services.**

Working in partnership with the Council, residents, and businesses, **we make a positive impact** for the people of Bristol and beyond.

Through our commitment to upholding **the highest standards of safety and environmental stewardship**, and focusing on **sustainable practices and innovation**, we seek to improve health and wellbeing outcomes for our customers and colleagues.

This purpose, also developed in collaboration with our employees and stakeholders, is central to our long-term vision. Articulating this purpose is crucial as it provides a clear and unified direction for our efforts over the next decade outlining what we do, how we work and the impact we will make on the city.

Our initiatives are aligned with our core values, promoting collaboration and innovation. By clearly defining our purpose, we inspire and motivate our team, stakeholders, and the community, demonstrating our commitment to making Bristol cleaner, safer, and more sustainable. This clarity allows us to track our progress, celebrate our achievements, and continuously strive for improvement, ensuring a positive and lasting impact on our city and its future. Moreover, our purpose helps colleagues understand their contributions, which enhances the significance of their work and directly boosts colleague engagement.

2.3 Values

Everyone at BWC is important. We are dedicated to improving the quality of people's lives and making Bristol, and beyond, a better place.

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Our values will be the cornerstone of everything we do, helping to form a sense of unity, encouraging us to work together, treat everybody with respect and perform to our fullest.

We do what's right

We take responsibility for safety, our actions and treat each other with respect.

We communicate

We listen, and open communication is important to us.

We work together

We are one team who encourage and support each other.

We perform

We strive to be our best and celebrate our wins.

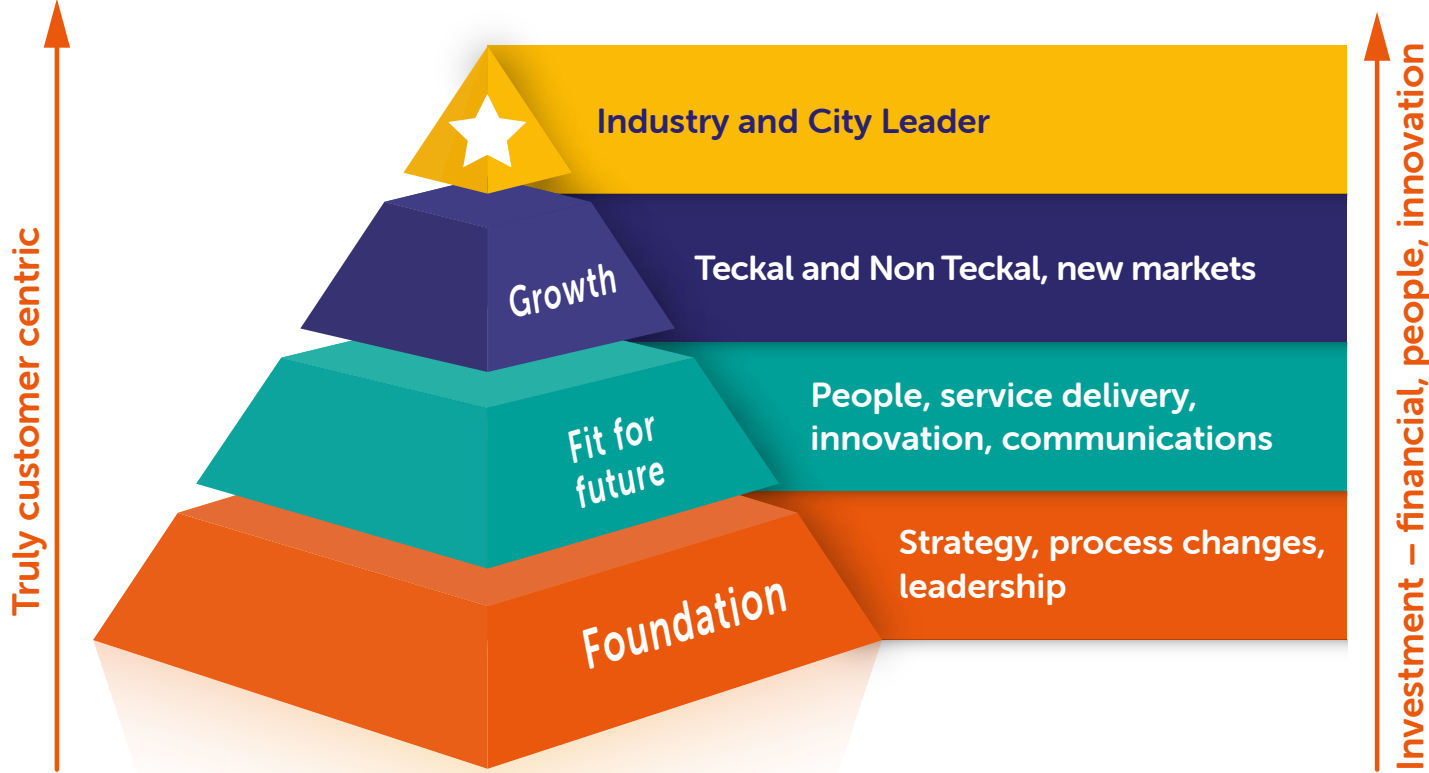
Our Values

Everyone goes home feeling good about themselves

Three images illustrating BWC values: a smiling worker in a high-visibility vest, two men shaking hands, and an aerial view of a waste management facility.

bristolwastecompany.co.uk37

2.4 Where Do We Want To Be in 10 Years?



The next decade offers an exciting opportunity for BWC. We will continuously improve our services, make investments that will create a step-change in our service delivery making Bristol safer, cleaner and more sustainable. We are emerging from a ‘turn-around’ phase that focused on creating robust strategies, processes, culture and strong leadership. We are now focusing on building a business that is ‘fit for the future’. This includes building teams, streamlining service delivery, incorporating innovation, and enhancing communication.

Moving forward, our emphasis will shift toward inclusive, sustainable, and commercial growth. We aim to strengthen both the Teckal and Non Teckal sectors of our business, positioning ourselves as a leader in our industry and a trusted partner in the city. Our goal is to increase the business by 50% over the next decade. This growth will allow us to achieve economies of scale, enabling us to:

- Deliver a **value-for-money** service.
- Innovate to **enhance service delivery**.
- Create **high-quality jobs** for the residents of Bristol.
- Expand our **Social Value impact** for the city.
- Provide **profits and dividends** to our shareholders.
- Develop a reputation for service excellence.



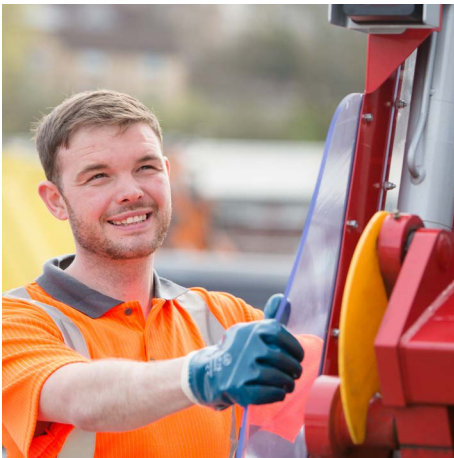
2.5 Economic, Social and Environmental

BWC is dedicated to delivering the best value-for-money service and driving the business and services towards financial and environmental and social sustainability (Appendix C).

Our commitment to delivering a safe, reliable, high-quality, and value-for-money service remains steadfast. By continuously monitoring emerging trends and adapting our strategies and operations, BWC aims to ensure sustainability and resilience in all aspects of our service. This proactive approach will enable us to meet the challenges of the future while maintaining our services enhancing the quality of life for the residents of Bristol.

2.5.1 Economic

- **Adapting to industry trends:** To stay abreast of industry trends, BWC will actively engage with key industry bodies and organisations (Appendix C). By participating with these organisations, BWC can access the latest research, attend industry events, and network with other professionals to stay ahead of trends to continuously improve services.
- **Adapting to the local economic landscape:** Locally, we will engage with Bristol City Council, West of England Combined Authority, Bristol One City, Bristol Climate and Nature Partnership, Business West Planning, Transport and Climate Group, Design West and Bristol Property Agents to understand local conditions.
- **Adapting to the competitive landscape:** We will implement our inclusive and sustainable strategy to grow our business over the next decade and to increase our commercial income to 50% of our business. By providing high-quality and value-for-money services delivering social value for the wider city, we will position ourselves to grow our Teckal and Non Teckal business. Growing our business will lead to greater benefits for the city through our commitment to social value and dividends for our shareholders.
- **Adapting to the technological and innovation landscape:** Over the next decade, BWC will adopt emerging technologies and integrate them into its operations when they are cost-effective, ensuring we remain competitive. For capital projects, we will focus on implementing proven technology ensuring that we deliver a reliable and value-for-money service, implementing best practices within our sector. For revenue projects, we will remain agile and explore innovative approaches to maintain our competitive advantage and leadership in the industry. The evolution of our workforce will be essential as the company adapts to new technologies. Upskilling employees to operate advanced systems and fostering an adaptable workforce will be crucial for maintaining operational efficiency.

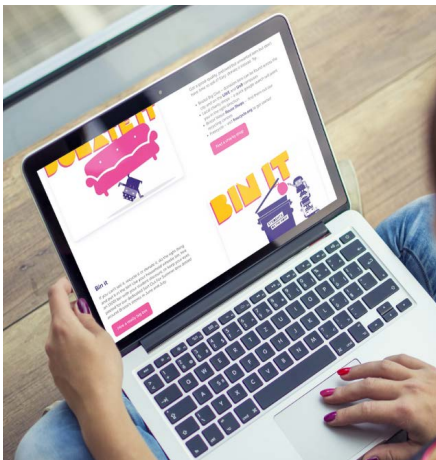


2.5.2 Social

- **Adapting to national political change:** Our membership of trade bodies (Appendix B) will allow us to adapt and flex to a changing political landscape over the next decade. Membership of trade bodies and associations (Appendix D) allows us to work advocacy for us within our sector, providing a unified voice to influence policy and legislators.
- **Adapting local political change:** BWC is an apolitical organisation. To navigate changes in administration and ensure our strategy and operations are aligned, we will maintain strong relationships with the administration, councillors, MPs, local politicians and officers.
- **Collaborating with local institutions:** We foster a collaborative approach to serving Bristol by aligning our wider social value with partners to deliver positive long-term change to benefit the city. We are a Bristol One City Partner, a member of the One City Environment Board, One City Transition Team, Bristol UN Sustainable Development Goals, Bristol Climate and Nature Partnership. Our strategic relationship with anchor institutes provides a platform for BWC to share its expertise and insights to support decision making throughout the city. Insights from these relationships helps shape our ongoing strategies and operational delivery.
- **Adapting to population, demographic and spatial change:** Over the next 10 years, BWC will face significant operational demands due to the city's growing population and increased waste and recycle generation. The need to scale up waste collection, recycling, and disposal services will create logistical complexities, particularly in areas with uneven spatial growth and urban densification. High-rise flats, limited storage space, and concentrated development will require innovative collection methods and enhanced resource allocation to meet these challenges effectively. To address these pressures, substantial investment in infrastructure modernisation will be necessary. Existing facilities will need upgrades and expansions to handle diverse and increasing waste streams, including e-waste and organics. Community engagement will be a critical factor in achieving these goals. Campaigns to promote behavioural changes, such as better waste segregation and recycling, will be essential for improving compliance and achieving sustainability targets. Additionally, addressing social inequities in waste services across unevenly developed areas will require collaborative, community-driven solutions. Ensuring equitable service delivery will be vital for maintaining public trust and meeting diverse community needs.
- **Adapting to consumer trends:** To manage consumer trends over the next decade, BWC will adopt a proactive, customer-focused strategy that addresses environmental, technological, and behavioural changes. Central to this strategy is raising awareness and encouraging participation in reuse and recycling. Data-led, citywide educational campaigns can help residents understand repair, reuse and recycling practices, particularly the importance of reducing contamination. Community engagement through partnerships with schools, businesses, and local organisations will foster a culture of sustainability, while reward programmes for households and businesses that excel in waste reduction can further incentivise positive behaviours.

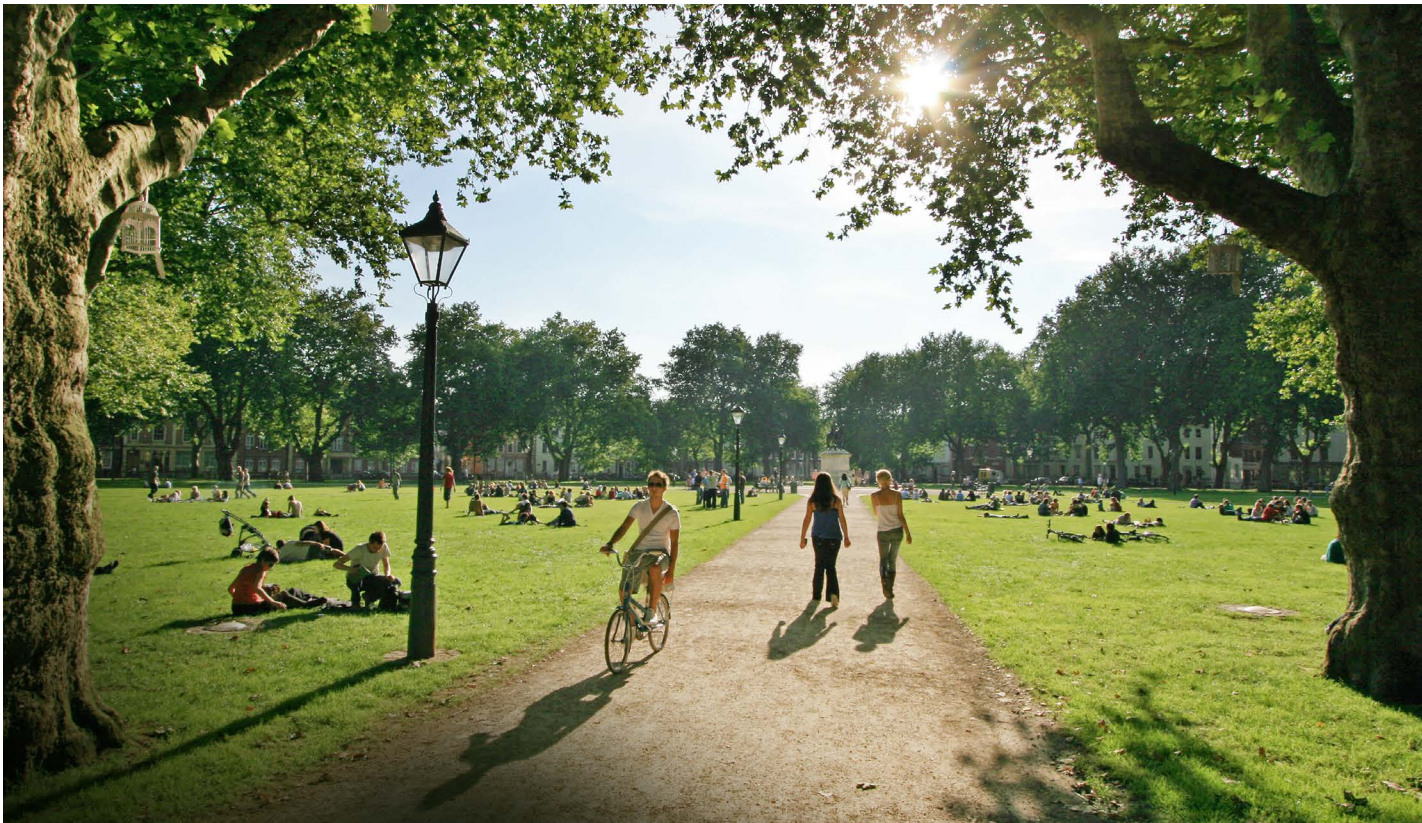


We will utilise our relationships with our partnerships and associations to influence behaviours across the city.



2.5.3 Environmental

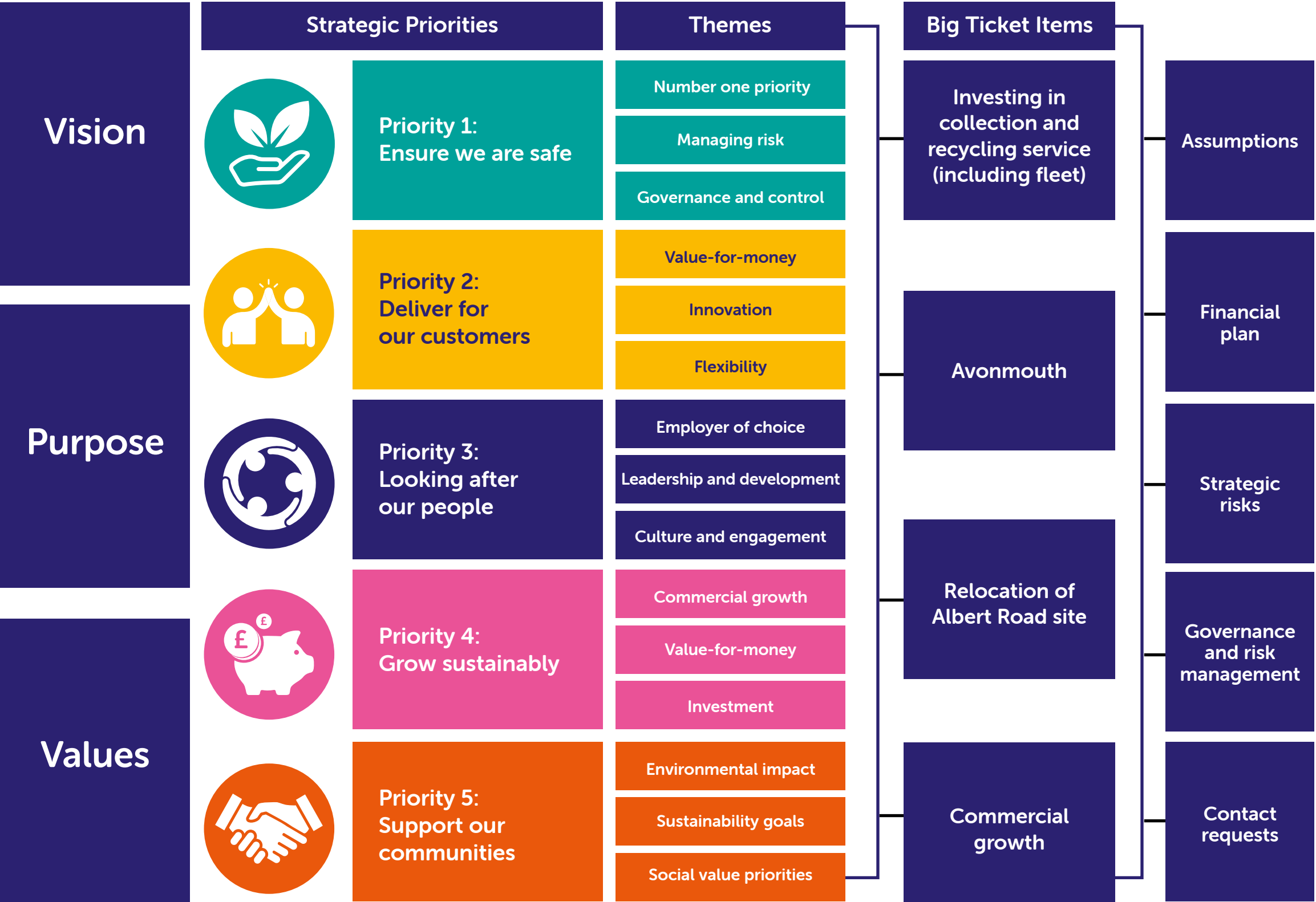
- **Meeting Net Zero:** BWC is committed to embedding net zero goals at the heart of its operations to align with the UK's 2050 target and BCC carbon neutrality. We will work with city partners including Bristol City Council, City Leap and Bristol Climate and Nature Partnership, to embed carbon monitoring, reporting and reduction throughout our operations and future developments e.g. new sites, new fleet.
- **Protecting nature:** BWC is committed to working with BCC to promote biodiversity in the city. We will continually review our impact and seek innovations to minimise harm.
- **Value Chain Initiatives:** Implementing strategies to minimise landfill reliance through recycling, reuse, and recovery programmes, ensuring materials remain in the value chain in the most sustainable and economic way.
- **Circular Economy:** We will work with partners across the city to embed the waste hierarchy into the city to reduce Scope 3 emissions, where we will encourage behaviour change to minimise waste creation, divert materials from waste and recycling streams through repair and reuse and improve material segregation to increase recycling rates.
- **Climate Adaptation and Risk Management:** To build resilience against climate change impacts, BWC will continue to align with the Task Force on Climate-related Financial Disclosures (TCFD) guidelines to assess operational vulnerabilities to extreme weather, supply chain disruptions, and resource scarcity. Enhance facilities with climate-resilient measures, such as flood defences and energy-efficient systems, to future-proof operations.



2.6 Strategic Priorities

Summary

As we look ahead to the next 10 years, our vision is guided by a set of strategic priorities that will drive our growth and ensure sustainable success. These priorities are designed to address the evolving needs of our stakeholders, capitalise on emerging opportunities, and navigate the challenges of a rapidly changing world. This section outlines the key areas where we will concentrate our efforts, setting the stage for a transformative decade.



See right and overleaf for more detail on the strategic priorities.

Our Strategic Priorities and Themes

The text below, and on the following pages, provides more detail regarding the strategic priorities and themes that shape our work and approach.



Priority 1: Ensure we are safe

Theme 1: Health and safety, our number one priority

Our priority is to cultivate a proactive health and safety culture, where safety is inherently woven into our strategic planning and daily operations. Through continuous engagement, structured training, and open communication, we will protect our employees, the environment, and the community from harm, achieving industry-leading performance in our industry.

Theme 2: Managing risk and innovating to improve

To manage our risks and make continuous improvements through innovation, we will focus on addressing our core health, safety, and environmental risks by constantly seeking new designs and opportunities that enhance the protection, safety, and welfare of our colleagues and those impacted by our services. We will provide materials, equipment, and transport designed with the tasks, restrictions, and stakeholder needs at the forefront.

Theme 3: Strengthened governance and control

To continually strengthen our governance and controls by upholding robust safety, health, environment, and quality standards. We will maintain a comprehensive Business Management system that ensures clear governance, sets high performance expectations, and drives continuous improvement to minimise risk.

Continue overleaf for further priorities. >



Priority 2: Deliver for our customers

Theme 1: Value-for-money

As a Teckal company, our primary objective is to deliver exceptional value-for-money services while maintaining the highest standards of quality, efficiency, and sustainability. By operating within the framework of public sector collaboration, we ensure that all services are tailored to meet the specific needs of our stakeholders, maximising cost savings without compromising on performance. Our approach is centred on transparency, accountability, and long-term partnership, using innovative solutions and best practices to optimise resources and deliver measurable results. With a strong focus on customer satisfaction and community impact, we are committed to providing a service that not only meets but exceeds expectations, all the while ensuring responsible and effective use of public funds.

Theme 2: Innovation

Our priority is to drive innovation to transform customer delivery, positioning ourselves at the forefront of our sector in Bristol and beyond. By embracing major industry trends such as the integration of the Internet of Things and Artificial Intelligence to develop tailored solutions to meet the evolving needs of our clients. We will adopt circular economy practices, reduce the carbon intensity of our operations and invest in our people to best implement these efficiencies. Our approach will also embark on digital transformation, towards real-time data analytics for optimised service delivery and enhanced customer engagement. This commitment to innovation ensures we stay ahead of regulatory changes and market demands, solidifying our role as a trusted partner in creating a cleaner, greener, and more adaptable future for our city and beyond.

Theme 3: Flexibility

To provide a flexible approach enabling us to adapt to emerging industry trends and the evolving needs of our clients. This will include integrating advanced technologies, enhancing operational efficiency and responsiveness. Embracing sustainable practices, including circular economy principles and innovative recycling and reuse methods. Our commitment to flexibility will position us as a trusted partner, capable of navigating the dynamic landscape of waste and facilities management while delivering exceptional, customised services to our clients.



Priority 3: Looking after our people

Theme 1: Employer of choice

To become the local employer of choice by enhancing our external profile, attracting top talent, and ensuring high retention. Our recruitment strategies will focus on skills and values-based hiring, including strategic educational partnerships and initiatives for under-represented groups. A robust employer brand will attract local talent, by promoting our employee value proposition, highlighting benefits and opportunities. To retain colleagues, we will implement clear career progression paths, comprehensive wellness programmes, and a supportive culture. Flexible working models will accommodate diverse preferences, improving work-life balance and motivate colleagues.

Theme 2: Leadership and development

To invest in colleagues through tailored training programmes, leadership pipelines, and mentorship, fostering a culture of continuous growth. We are committed to keeping colleagues' skills current, leveraging technologies such as AI and automation, and streamlining processes to enhance decision-making, and maintain a safe, productive, and agile workforce. Effective workforce planning will ensure we have the right skills to adapt swiftly to changing demands. We will also adopt a values-led and outcomes-driven business partnering model, utilising data analytics to inform our strategy and measure programme and policy effectiveness, ensuring evidence-based decisions that drive continuous improvement.

Theme 3: Culture and engagement

To create a workplace that embodies collaboration, integrity, and excellence, fostering a positive and inclusive environment representing our diverse communities. We will gather colleague feedback, to ensure our values and culture are relevant and inspiring. Our commitment to engagement will include clear career progression paths, comprehensive wellness programmes, and two-way communication. Our priority is to cultivate a supportive organisational culture where every colleague feels valued, motivated, and empowered to reach their full potential. We will also prioritise initiatives that add social value to our communities, including volunteer programmes, community outreach, and partnerships with local organisations. By encouraging this colleague engagement, we will foster a sense of purpose and connection beyond the workplace. Together, we will nurture not just a workforce, but a vibrant, inclusive community that is committed to excellence, continuous improvement, and sustained growth.



Priority 4: Grow sustainably

Theme 1: Commercial growth

To grow the business by 50% over the next decade by expanding both our Teckal and Non Teckal business, focused on Bristol and the surrounding areas. This will make best use of our existing infrastructure to deliver greater returns for our shareholder. Accomplishing this will require us to grow organically, offer a broader range of services and acquire new businesses to achieve such substantial growth. We will be known for delivering high-quality, value-for-money, reliable services that deliver social value benefits to Bristol and beyond and develop partnerships to support the delivery of the One City Plan (Appendix F).

Theme 2: Value-for-money

To deliver cost-effective, efficient, and high-quality services that meet the evolving needs of our customers and stakeholders to stimulate the growth of our Teckal business. We aim to optimise resource allocation, streamline operations, and maintain rigorous environmental, health and safety standards, and quality control to ensure exceptional service delivery. Our strategy focuses on maximising the return on assets through effective utilisation, strategic investments, and lifecycle management.

Theme 3: Investment

To invest in our people, services, and assets to achieve our vision. We aim to be an agile, forward-thinking, innovative, trusted, and profitable company. We are committed to investing in the city to achieve the 'One City' goals for the residents of Bristol, focusing on social value and purpose. Additionally, we plan to invest in the value chain, both higher and lower, and seize investment opportunities to grow the business through partnerships and potential acquisitions. We aspire to maintain and invest in assets that support our company vision and purpose from a stakeholder's perspective. We aim to have agile assets that can adapt as markets change.



Priority 5: Support our communities

Theme 1: Environmental impact

We will prioritise reducing environmental impact as a core pillar of our mission to support communities across Bristol and beyond. By embracing the circular economy, zero waste and carbon reduction strategies plus advanced recycling technologies, we will lead efforts to minimise the environmental footprint of our waste and facilities management operations. We will leverage innovations, deliver impactful behaviour change campaigns and foster meaningful community engagement. Through education, collaboration, and proactive outreach, we will empower individuals and organisations to reduce harmful environmental impacts by reducing carbon emissions and protecting natural resources to contribute to a cleaner, healthier environment for future generations.

Theme 2: Sustainability goals

We are committed to advancing sustainability for Bristol and beyond. Aligned with the United Nations Sustainable Development Goals (SDGs), our vision is rooted in collaboration and innovation to drive meaningful change. Locally, we will work with partners through the One City Approach, supporting the delivery of the One City Plan. Leveraging our expertise in resource management and circular economy solutions, we will build strong relationships and partnerships to position Bristol as a model city for sustainability – where cutting-edge waste solutions, thriving ecosystems, and empowered communities come together to create a prosperous and sustainable future for all.

Theme 3: Social value principles

We will prioritise creating social value to deliver positive and lasting impacts for the people and communities we serve. We aim to go beyond our core operations to drive meaningful community development through job creation, skills training, and inclusive hiring practices, particularly for underrepresented groups. By fostering partnerships with local organisations, schools, and social enterprises, we will support education, environmental awareness, and initiatives that promote health and wellbeing. We will prioritise collaboration on community-driven projects that enhance public spaces, reduce inequality, and improve all residents' quality of life. Guided by measurable outcomes and a commitment to transparency, we will ensure our efforts contribute to vibrant, resilient, and sustainable communities.

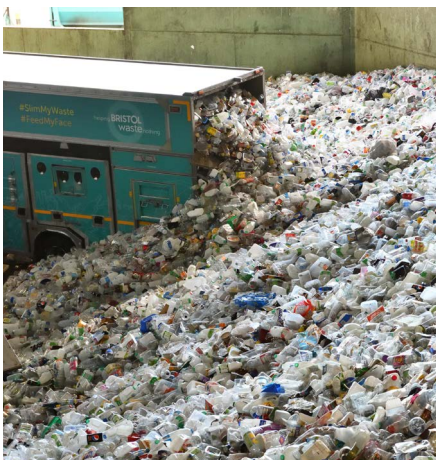
2.7 Big Ticket Items

2.7.1 Collection and Recycling Service

To maintain the position of being the best English core city for recycling and meet future recycling targets, there is a need to invest in the collection and recycling service.

This investment must also deliver a value-for-money service. WRAP acknowledges that increasing recycling in urban areas is challenging and that there is no single solution. The best approach to achieve success is to take a tailored and very local site-specific approach – block by block, street by street. Our approach will be to collaborate with our shareholder, strategic partner and wider city partners to implement a range of the following interventions:

- **Containers:** containers and bags that make recycling simpler, providing greater clarity to reduce contamination and increase volumes.
- **Signage:** improved signage for communal containers.
- **Site specific interventions:** tailoring of service to meet specific local circumstances.
- **Training:** crew training for collection of different or additional materials.
- **Broader range of materials recycled:** increasing range of materials to be recycled.
- **Communication and engagement:** targeted communications and behaviour change engagement campaigns.
- **Co-design:** involvement of tenants’ and residents’ groups in designing the service/ siting of containers.
- **Stakeholders:** involvement of landlords, caretakers and facilities managers in designing the service/ siting of containers and providing information to residents.
- **Circularity:** creating a citywide network of reuse and repair facilities.
- **Data:** leveraging real-time data and smart technologies to optimise collection routes and enable a transition to on-demand collection services.
- **Fleet:** upgrading in a low-carbon emission fleet that is designed for the urban environment, featuring narrow designs for tight roads and stillages to accommodate varying waste compositions. (Review of all options to include diesel, hydrogen and electric).
- **Capacity:** investing in waste transfer infrastructure that can accommodate a greater volume of recycle.



2.7.2 Avonmouth III

This phase of the development at Avonmouth is the next stage in our ongoing commitment to enhancing operational efficiency, safety, and environmental sustainability.

It will be instrumental in transforming the site into a modern facility tailored to the evolving demands of commercial waste and recycling services. As we prepare for the implementation of Phase II our focus remains firmly on continuous improvement and innovation. The lessons learnt and the successes achieved during the project to date will guide future development initiatives. The development will include:

- **Resurfacing of the site with impermeable material:** this enhancement will provide a robust and durable surface capable of withstanding the high-volume operations inherent to waste and recycling processes. The new surface will not only improve operational efficiency but also contribute to enhanced environmental control by minimising dust and runoff, further aligning with our sustainability objectives.
- **Redesign of operational bays:** by increasing the capacity and accessibility of these critical areas, the site will be optimised for a higher throughput of materials. This expansion will streamline workflow processes, reduce turnaround times, improve fire controls and allow for the seamless handling of larger volumes of commercial waste and recyclables. These improvements will be pivotal in positioning Avonmouth as a leading local hub for waste management.
- **Health and safety enhancements:** recognising the paramount importance of health and safety, Phase III will introduce several measures designed to protect our workforce and visitors. These will include improved pedestrian protection and transport management, enhanced lighting systems, fire safety, air quality, better office and welfare spaces and the integration of advanced safety monitoring technologies. The result will be a safer, more controlled environment that meets and exceeds industry standards.
- **Increased throughput:** the cumulative impact of these developments will significantly boost the site’s overall throughput capacity. With the infrastructure in place to handle greater volumes of commercial waste and recycling efficiently, Avonmouth will become a cornerstone in supporting regional and national sustainability goals. This increased capability will not only strengthen our operational performance but also reinforce our commitment to delivering high-quality services to our clients and communities.
- **Recycling processes:** the redesign of the site will give greater capacity to sort and process waste streams to recover the recyclable products and materials, reducing disposal volumes and increasing recycle revenues, but also supporting our sustainability aims to maximise recycling. This will utilise existing processes including mechanical picking, shredding, and sort lines, but also look to bring in new technologies to optimise opportunities.





2.7.3 Albert Road Relocation Planning

Albert Road is the central operational hub for BWC, supporting essential functions, including the head office, the collections service, recycling transfer station, fleet workshop, and vehicle storage.

The site is owned by BCC and is located within the Temple Quarter LLP, an area experiencing significant investment and regeneration. The site has been earmarked within the re-development and BWC have been guided to expect a move from the site in 2028. The relocation is timely, as the site is no longer fit for purpose as an operational depot to deliver the services the city demands, nor as a head office with sufficient space to enable support function teams to work collaboratively.

Vision for the New Site(s)

The planned relocation to a new site must aim to sustain operational excellence while embracing Bristol's commitment to sustainability and growth and provide suitable infrastructure for the long-term operation and development of the service. To meet operational and strategic demands, the move may be split over more than one site. Work is underway with BCC to identify suitable locations for the new depot. Operations must continue without disruption during the transition to any new site, this will require detailed planning, with a full assessment of the people impacts and phased execution.

Key elements of the new site(s) will include:

- A suitable waste management permit (existing or new).
- Planning permission for 24-hour activities allowing for noise impacts for vehicle movements and recycle processing.
- Located centrally within the city with a south-western bias (for a single location or north and central/ SW for two depots).
- Easy access from the major road network to accommodate circa 400 operational vehicle movements per day.
- Strong public transport and active travel links making it easily accessible for a large workforce.
- A modernised workspace to accommodate back-office and leadership teams with space and facilities that enable a supportive, collaborative and positive culture.
- Enhanced transfer facilities to manage a greater volume and range of materials to streamlining waste and recycle transfer and processing, and maximise recycle value.
- Increased electricity capacity (by a factor of 40) to enable fleet electrification.
- Sufficient space for vehicle parking and an on-site workshop to support efficient fleet management and logistics.
- Welfare and changing facilities for operational teams supporting a positive and caring workplace and optimising cohesion among teams.

2.7.4 Growing the Business

The aim is to double the turnover over the next decade.



This approach will diversify potential revenue streams through commercial ventures, partnerships, and competitive projects outside the Teckal framework but aligned to sector and geographic interests.

Future changes will be discussed and approval sought from the existing BWC Board and the shareholder.

This provides the following benefits:

- Technical expertise and industry insights shared between the Teckal and Non Teckal entities, resulting in higher quality and more innovative services.
- Economies of scale in shared back-office functions such as IT, HR, and procurement will ensure fair cost allocation, potentially lowering costs for customers.
- Generating a profit which can be used to provide cross subsidy and investment into the Teckal business for the direct benefit of Bristol residents.
- Supporting commercial clients to implement the waste hierarchy and embed sustainable practices.





Part 3 – Financial Overview

3.1 Assumptions

A number of assumptions have been made to prepare our 10-year vision.

3.2 Financial Plan

A financial plan has been developed.

3.3 Savings through Procurement

The business has delivered substantial savings over the last couple of years, and with a new procurement function, there is some scope to do more going forward. Our bolstered material sales team is looking closely at our recyclate market analysis and focused on opportunities to maximise sales return, responding to the volatile market flexibly.

Having already made significant improvements, and with the foundations being laid for more, the business is now entering a phase where it can be more positive and look further ahead. BWC is positioned to be right at the centre of Bristol's drive towards carbon net zero, helping to deliver the sustainability targets, and to be an exemplar Teckal business. There is some way to go, but we know where we are heading and what it will take to get there.

BWC operates within a contractual framework with BCC which sets certain parameters, including pricing. In addition, we now service 20,000 more properties than when the waste contract started.

There are areas for improvement that are within the control of BWC. These are all being progressed. Key elements include:

- Improving collections performance to deliver a consistent service and increase recycling.
- Greatly improving and modernising the culture as part of our drive to be an employer of choice.
- Improving the standards and performance of management and supervisors to perform at our best.
- Improving financial awareness and capabilities across the business to deliver a profitable business.
- Embedding our internal communications strategy to fully enable two-way colleague engagement.
- Embedding new governance and control measures to ensure strong risk management and control.
- Embedding updated key policies and procedures.
- Making savings within the procurement process.



3.4 Strategic Risks

A major risk to the business is regulatory changes that could increase costs and require significant changes to waste management practices.

An example of this is the tax being imposed on emissions from the incineration of waste from 2028. To avoid any distortion of the trading position of the business, these taxes have been excluded from the P&L schedules. However, it is estimated that the cost would be between circa £5m and £9m per annum.

Within the growth plans, there are two acquisitions of organisations which would contribute significantly to the revenue and profitability of the company. To enable these transactions to take place, additional funding from BCC would be required, which would be (£9m and £6m), and therefore a risk would be recognised as to the opportunity to provide such loans.

In the 10-year plan, significant growth of the commercial part of the business plays a vital role. Without this growth, the business would remain at a constant level of revenue and would not generate the profits to balance the loss-making municipal division. There is a mix of both organic growth and also acquisitions over the longer-term period, within commercial waste, security and cleaning revenue streams.

Within the financial section of the 10-year plan, it is assumed that the municipal waste contract will be awarded to BWC. However, it must be considered as a strategic risk that an alternative provider is awarded the contract. Without the security of the long-term municipal contract, the BWC legal entity would exist purely from a commercial revenue aspect and the Teckal status would need to be reviewed accordingly.

Albert Road Relocation: A major project in the long-term plan is the site move from Albert Road. Planning has already started, as there is limited available land within the close proximity of the city centre. This is essential for refuse and recycling collections and also the size of the site could pose an issue. The cost of the full move and new land and buildings would be paid by BCC, as with all other current sites used by BWC.

Fleet Procurement: The fleet is scheduled to be replaced at the beginning of the new contract in April 2027, delays to this procurement process will have a negative effect on the delivery of the recycling service as the current fleet is no longer fit for the volumes of material being recycled. The design of the fleet will need to consider the current demands and impacts of future legislation and behavioural changes.

Cash and Valuables in Transit: Demand for this service is expected to continue to decline over the 10-year period to a point that it may become commercially unviable.

3.5 IT and Systems Infrastructure

Investing in IT and systems is a necessity for businesses striving to meet both current and future operational and strategic demands.

A lack of adequate investment in this area results in inefficiencies that hinder operational delivery, diminish staff morale, and compromise overall business performance. Modern IT infrastructure and systems not only streamline processes, enhance productivity, and improve decision-making but also position organisations to adapt to changing market dynamics and customer expectations. By prioritising investment in this critical area, businesses can drive growth, foster innovation, and maintain a competitive edge in an increasingly technology-driven world.

Current systems set up and costs

Currently there are specialist solutions used within the business, which are specific for waste management. However, there is a lack of integration within the core operating systems.

These are:

Sage 200

- Sage is the finance and accounting system, which has been used for some time. However, there are later versions of Sage and also other software providers which can offer more modern and automated packages to enable enhanced facilities.

iTrent

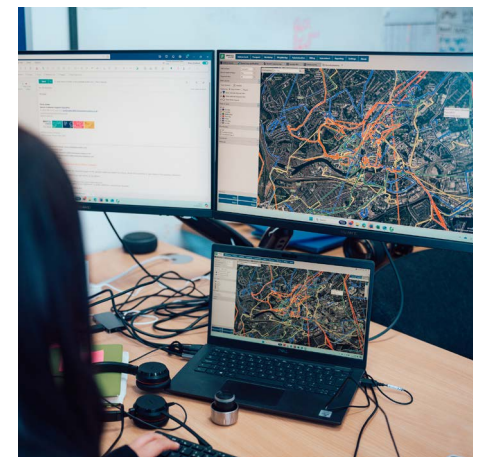
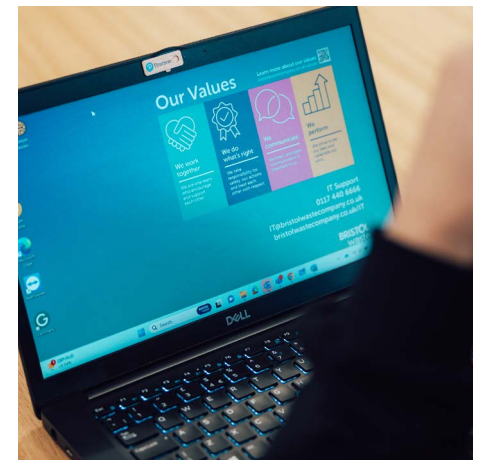
- iTrent is the current HR and Payroll system, which is managed by the BCC IT Department, so there are certain restrictions as to what BWC can change. As with the Finance system, there are many other integrated HR and payroll systems on the market which could interact with all other systems, resulting in a reduction in processing time and potential errors.

Alloy

- Alloy is the current vehicle management and collections planning system, which has also been in place for some time. The industry has other alternative systems, used by the larger waste management companies, so to remain competitive and enable flexibility for changing collections, consideration would be given to an alternative system.

PurGo

- PurGo has recently been implemented and serves as the system for commercial customer management and billing. It is likely that this would remain in place but would become more automated with other systems, when they are implemented in future years. This is a common and reliable system within the waste management industry.





Future Systems and Costs

The implementation of an ERP (Enterprise Resource Planner) would support BWC growth aspirations and enable greater efficiencies and effectiveness in delivering its services. An ERP would enable the integration of multiple systems across the business including finance, payroll, stock and HR. BWC is exploring solutions including Microsoft Dynamics, NetSuite, and SAP Hana. For planning purposes, the expectation should be that the implementation of an ERP solution would cost circa £350k in year one, followed by an ongoing annual cost of circa £85k.

An integrated HR and Payroll system would expect to cost circa £50k in year one with around £65k per annum for licenses and support. BWC is currently using iTrent for HR and Payroll, but over the coming years, either a significant upgrade to the latest version would be required, or preferably a new IT system, which would fully integrate with the new accounting system, as detailed above.

Timing of Implementation

A full configuration and implementation of a new ERP solution should be completed between six and 12 months dependent on the speed of process change the business is willing to undertake.

Based on current business plans the business should complete a full review of possible solutions, map out all processes and ways of working, and build the full business case by the end of 2026, with a view to implement the new ERP solution in 2028.

Benefits

A fully implemented and integrated ERP solution should offer the business a multitude of benefits, including:

- **Compliance:** regulatory requirements and standards are automatically configured within the systems.
- **Productivity:** with automated processes and streamlined operational ways of working.
- **Data integrity:** integrated solutions will allow great level of data certainty, reporting and analysis.
- **Scalability:** to match the business growth.
- **Stability:** ensure the system is available 24/7 and the removal of the need for spreadsheets to operate the business.

Summary

Having a fully integrated ERP solution would fulfil part of BWC’s ambition to be a modern and effective workplace. Solutions, such as Microsoft Dynamics, not only provide efficiencies and data accuracy, but are also user friendly and give people the tools to do their jobs more effectively, as one would find in all, commercially-focused and successful businesses.

3.6 Contract Request

Bristol Waste Company is committed to delivering a cleaner, safer, and more sustainable future for the city and beyond. By aligning with Bristol City Council and One City goals and strategies, investing in sustainable and innovative solutions, adopting and fostering strong community engagement and citywide collaborations, we will continue to drive progress to deliver exceptional and good-value environmental and facilities management services.

Our priorities over the decade will be:

- Ensuring we are safe
- Delivering for our customers
- Looking after our people
- Grow sustainably
- Supporting our communities.

The next decade will see further opportunities and transformation of the business that will deliver ongoing benefits for the people of Bristol and beyond, with:

- Investment in our collections and recycling services (including fleet), improving operational efficiency and effectiveness to support the city to meet its ambitious recycling targets.
- Investment in our processing facilities to improve our capacity to process greater volumes of recyclates, to boost operational efficiency and effectiveness, and to deliver greater commercial and sustainable growth that will benefit the city.
- Looking after our people to become an employer of choice, attracting and retaining talent.
- Growing sustainably to provide the scale to deliver effective and efficient services that deliver wider benefits to the city.
- Supporting our communities through the adoption of leading environmental and sustainable practices that reduce harm to the environment and deliver financial benefit to the city and wider social value.

Working together with Bristol City Council we will ensure that we retain number one core English city status for recycling and provide leadership in sustainability for the good of the people of Bristol. Our aim is to be an exemplar Teckal and Non Teckal business.

We request the renewal of our contract so that together we make a lasting positive impact for the people of Bristol and beyond. We will commence engagement at the earliest convenience taking a collaborative approach in alignment with our strategic objectives.

Appendix A – Key Performance Indicators

Key Performance Indicators (KPIs) for 2027–37 period have yet to be agreed. It is anticipated that many KPIs will roll into the new contract. BWC will also have internal KPIs aligned with its priorities.

Appendix B – City Partnerships

Bristol Waste Company is an active participant within the following city networks.

Partner	Nature of Partnership
Bristol Climate & Nature Partnership	Bristol Climate & Nature Partnership , formally known as Bristol Green Capital Partnership, is the largest sustainability partnership in the world with a collaborative network aimed at driving citywide action towards a zero-carbon, nature-rich, and socially-just Bristol. This partnership brings together over 1,200 organisations, including policymakers, businesses, charities, and community groups, to address climate and nature challenges collectively. BWC and the Bristol Climate and Nature Partnership are closely aligned in their efforts to make Bristol a more sustainable city offering opportunities for strategic partnerships to deliver carbon reduction and resource efficiency projects and greater community engagement.
Visit West	Collaborate to provide additional street cleansing and graffiti removal within Bristol City Centre, Broadmead and Temple and Redcliffe Business Improvement Districts. BWC (Commercial) is also a Visit West 'Supplier Member'.
Bristol Food Network	Bristol Food Network – Transforming Bristol into a sustainable food city is a collaborative initiative dedicated to transforming Bristol into a sustainable food city. Coordinated by Bristol Food Network C.I.C., it connects individuals, community projects, organisations, and businesses that share a vision of promoting and encouraging cooking from scratch, growing food, consuming fresh, seasonal, local, and organically-grown produce, and reducing food waste.
Bristol Initiative, Business West	Bristol Initiative, Business West is a business leadership team under the umbrella of Business West. It aims to positively influence the way Bristol and the surrounding areas are shaped, managed, and developed. Its long-term vision is articulated in 2050: High In Hope. It provides a mechanism for business leaders to collaborate to influence and deliver on its long-term priorities: prosperity, health, clean growth, skills development, housing, transport and climate change.
Bristol One City	The Bristol One City initiative is a collaborative effort aimed at making Bristol a fairer, healthier, and more sustainable city by 2050. It brings together a wide range of partners from the public, private, voluntary, and third sectors to work towards common goals. The One City Plan outlines these goals across six key themes: Economy and Skills, Children and Young People, Transport, Homes and Communities, Environment, and Health and Wellbeing. Each theme has specific targets set for each year, building towards the long-term vision for the city. As a City Partner (City Partners Group - Bristol One City) and member of the Environment Board Environment Board - Bristol One City, BWC plays a pivotal role in strategic city-wide collaboration to shape and deliver the One City Plan. We are also part of the Climate Neutral City Transition Team that is supporting Bristol's transition to carbon neutrality Mission Net Zero.
Bristol Repair Coalition	Bristol Repair Coalition is a partnership of Bristol-based academics, educational institutions, council representatives, waste management professionals, charities, repair and community groups, social enterprises, and businesses, all collaborating to strengthen the city's culture of repair, care, and maintenance.

Partner	Nature of Partnership
Bristol SDG Alliance	SDG Alliance is a group of interested stakeholders, from across Bristol, who have come together to advocate for the use of the UN Sustainable Development Goals (SDGs) to create a socially, environmentally and economically sustainable city and region that will be a beacon within the UK.
GENeco	Collaboration with GENeco to deliver behaviour change campaigns to divert food from municipal waste.
Highways England	Collaborate to coordinate fly-tipping and graffiti removal on fly-overs and motorway underpasses.
SevernNet	This is a social enterprise that fosters collaboration among businesses, community interests, and stakeholders in the area, encompassing Royal Portbury Dock, Avonmouth, Severnside, and Western Approach. Established in 2009, SevernNet has been instrumental in driving initiatives that enhance resource efficiency, promote sustainable practices, and address common challenges within this industrial and coastal community.
Share Bristol	Charity Partnership agreement to donate items from Reuse for Share Bristol's Library of Things
Bristol Student Community Partnership	Established to promote student and community relations and cohesion. Members include representatives from the University of Bristol, UWE Bristol, both Students' Unions, BCC, BWC, Avon and Somerset Police, local ward councillors and community representatives.
Bristol Clean Streets	Bristol Clean Streets is a proactive forum that meets regularly and consists of residents, representatives from community groups, businesses, BCC and BWC.
STEM Learning Network	BWC Engagement Team includes registered STEM ambassadors who connect through the network with opportunities to educate young people.
University of Bristol	BWC works with UoB and UWE Bristol on the Students on the Move project.
University of West of England, Bristol	BWC works UWE Bristol and UoB on the Students on the Move project, and also provides commercial cleaning services for student accommodation.



Appendix C – Economic, Social and Environmental Trends and Dynamics

Economic Trends and Dynamics

Industry Growth Projections

Trend	Implication for BWC
<p>The UK waste management growth: The sector is projected to continue its growth trajectory from 2024 to 2034. Analysis indicates that the total revenue for the UK waste management and recycling market is anticipated to grow at a compound annual growth rate (CAGR) of 5.22% from 2024 to 2030, reaching nearly £50 billion UK Waste Management and Recycling Market: Industry Analysis The UK Waste Management Market Size and Share Analysis 2024–2030. The UK facilities management (FM) sector is projected to grow steadily over the next decade, with the market size expected to increase from £69.28 billion in 2024 to £75.19 billion by 2029, at a compound annual growth rate of 1.65% United Kingdom Facility Management Industry Market Size Overview and Analysis. These projections highlight the sector’s ongoing expansion, driven by factors such as technological advancements, government policies promoting sustainability, and increasing public demand for effective environmental and facilities management solutions. The growth is also supported by the rising population and the corresponding increase in demand for services.</p>	<ul style="list-style-type: none">• Utilise industry bodies to stay ahead of trends in the market.• Utilise trade bodies to inform policy makers on the need to incorporate waste management into development policies.• Utilise local economic growth and planning forums to share best practices, inform decision-makers on the implications on waste, reuse, recycle and soft FM.

Consumer Behaviour Trends

Trend	Implication for BWC
<p>Waste Management</p> <ul style="list-style-type: none">• Online shopping: Generates higher rates of product returns with greater waste being generated from non-resalable items being discarded. Advances in technology continues to increase electronic waste, creating greater demand on recycling and disposal methods.• Retail trends: It is anticipated that the surge in e-commerce will continue to contribute to a rise in packaging waste, particularly cardboard boxes and plastics placing a greater pressure on the recycling system.	<ul style="list-style-type: none">• Need to adapt operations to allow for a change in the volume and composition of materials including cardboard.• Need to deliver behaviour change campaigns supporting the adoption of the waste hierarchy e.g. use of the Reuse Shops, repair service.• Look for new opportunities to reuse materials.• Adjust its operations to move contaminate from material streams e.g. biodegradable materials.

Consumer Behaviour Trends

Trend	Implication for BWC
<p>Facilities Management</p> <ul style="list-style-type: none">• Enhanced security: Consumers prioritise safety features like advanced surveillance and secure access systems.• Health and Wellbeing: Growing focus on environments that support mental and physical health.• Sustainability: Increasing demand for eco-friendly and energy-efficient practices.• Technology adoption: Consumers expect seamless experiences with smart technologies which will enable their preference for on-demand services.	<ul style="list-style-type: none">• Adapt its operations to reflect the need for greater integration with technology.• Use of products that promote sustainability, safety and health and wellbeing.

Competitive Landscape

Trend	Implication for BWC
<p>Environmental Services</p> <ul style="list-style-type: none">• Demand growth: Increased population will increase the demand on services and opportunities (current value of the market circa £350m).• Competitors: The market is served by:<ul style="list-style-type: none">• National players including Veolia, Biffa.• Regional firms including Hills Group, Grundon and MJ Church.• Repair and reuse market is under-developed and is served by the voluntary and charity sector.• Ubico, another Teckal company providing environmental services delivers services to the north of the city. <p>Soft Facilities Management</p> <ul style="list-style-type: none">• The soft Facilities Management market is served by national players including Almeda and Mitie in addition to smaller local providers.	<p>BWC will need to take a multi-faceted approach that combines technological innovation, sustainability, and customer-centric service.</p> <ul style="list-style-type: none">• Focus on delivering a value-for-money, reliable service.• Optimise operations to remain competitive.• Prioritise sustainability, including carbon reduction and delivering social value.• Invest in service improvement.• Review pricing.• Utilise local networks to reach commercial customers.

(Continued overleaf)



Economic Conditions:

Regional or Local Economic Conditions:

Trend	Implication for BWC
<p>Macro Trend: The UK economy has emerged from the twin global shocks of the pandemic and Russian invasion of Ukraine into a period of declining inflation but stagnating output.</p> <p>The Office for Budget Responsibility Economic and Fiscal Outlook for March 2024 projects moderate economic growth over the next decade, inflation stabilising at around 2%, significant investments in technology and meeting net zero targets, increasing challenges from an ageing population with a greater population but a smaller workforce, continued public and private infrastructure investment, and efforts to address regional economic disparities.</p>	<ul style="list-style-type: none">• Need to build resilience to a more volatile, uncertain, complex and ambiguous (VUCA) world where global shocks are more frequent and their impact on markets are fast.• Need to accommodate inflation into the delivery of its transformation projects.• Need to accommodate an ageing workforce in its workforce development.• Need work with its shareholder to remain investment ready to capitalise on public infrastructure investments.• Need to capitalise on more commercial opportunities that emerge from anticipated economic growth.
<p>Population Growth: Bristol is projected to be the fastest growing region in the UK outside of London.</p> <p>Neighbourhood planning EY UK Regional Economic Forecast 2024 EY - UK.</p>	<ul style="list-style-type: none">• Need to manage a greater strain on municipal contracts as the demand on services increases.
<p>Employment Growth: Employment in the South West, which includes the West of England, is projected to grow by 1.2% annually between 2024 and 2027, surpassing the UK average of 1.1%. This positive trend reflects the region's dynamic job market and its appeal to a highly skilled workforce.</p>	<ul style="list-style-type: none">• Need to manage recruitment and retention challenges in a buoyant employment market.• Need to incorporate skills shortages in its workforce planning.• Need to partner with the local educators and VCSE sector to reach out to 'hard to reach' talent.
<p>Spatial Growth: Over the next decade, Bristol is set to experience significant spatial growth, focusing on delivering around 11,000 new homes by 2040 through the redevelopment of underused sites and higher-density projects.</p>	<ul style="list-style-type: none">• Need to engage with decision-makers to ensure waste management and facilities management is considered within spatial and economic growth plans.• Need to ensure future contracts reflect the impact of both population and spatial growth on services.• BWC to plan for a workforce that will have a larger travel to work area due to housing costs.
<p>Economic Development: A number of policies and plans are directing economic development across the city. The Government 'Plan for Change' announcement, stating that there would be mandatory targets for councils with 1.5million new homes across the UK over the next five years. Locally, regeneration projects in the city are being led by masterplans and direct investment, aiming to create a diverse and inclusive economy that supports local businesses and community initiatives. These include Bristol Local Plan, Bristol Central Area Plan, West of England Joint Waste Core Strategy and Neighbourhood Development Plans.</p>	<ul style="list-style-type: none">• BWC to share its insights to managing waste and recycling with decision-makers in the context of urban growth.• Need to ensure future contracts reflect the impact of both future developments and plans on services.
<p>Economic and Budgetary Pressures: BCC faces a challenging fiscal outlook over the next decade, with a significant funding gap driven by inflationary pressures, increasing demand for social care services, and the need for temporary accommodation. Economic challenges will drive cost-cutting and efficiency in public services.</p>	<ul style="list-style-type: none">• Limited budgets may restrict investments in infrastructure, forcing BWC to find cost-effective ways to meet rising demands for waste collection and recycling.

Technological Advancements

Trend	Implication for BWC
<p>Innovations and Disruptions: Our sector is experiencing significant technological advancements aimed at enhancing efficiency, promoting sustainability, and supporting the transition to a circular economy. These technological trends will collectively transform the environmental services and soft FM sector over the next decade, contributing to environmental sustainability and resource conservation.</p>	<ul style="list-style-type: none">• Need to keep abreast of changes in the industry.• Need to invest, trial innovations to remain competitive, efficient and effective.
<p>Internet of Things (IOT): This refers to the network of physical devices, vehicles, appliances, and other objects that are embedded with sensors, software, and other technologies, allowing them to connect and exchange data over the Internet. This enables these 'things' to collect and share information, make decisions, and communicate with each other without human intervention.</p>	<ul style="list-style-type: none">• For Environmental Services, IOT technologies e.g. smart bins offers opportunities to move towards demand-led services, optimising routes, reducing costs and emissions.• For soft FM, data gathered from IoT devices will provide FM providers with real-time insights, enabling better decision-making and more efficient resource management. These insights will help in improving service delivery and predicting future needs.
<p>Artificial Intelligence (AI) and Machine Learning: This refers to the ability of machines or computer systems to perform tasks that would normally require human intelligence. These tasks can include reasoning, problem-solving, perception, understanding language, and decision-making. AI systems can learn from experience, adapt to new information, and perform a wide range of activities without being explicitly programmed for each one.</p>	<ul style="list-style-type: none">• For Environmental Services, the adoption of AI can help enhance waste sorting and recycling processes. This could reduce staff costs, reduce contamination, improve recycling rates and gain better returns on materials.• For FM, this technology can be applied through the use of robotics for cleaning tasks (e.g. floor cleaning robots, window washers) and will reduce the need for manual labour and increase efficiency. This will also ensure consistent service quality.
<p>Circular Economy Practices: There will be a shift towards circular economy principles, focusing on reducing, recycling, repurposing, and upcycling waste. This approach will help keep materials in use for longer and minimise waste.</p>	<ul style="list-style-type: none">• For Environmental Services, this offers the opportunity to expand the reuse and repair services.• For FM, this offers the opportunity to keep materials in use and work across verticals within our business e.g. linking cleaning with reuse.
<p>Mobile Apps and Customer Service: AI-powered chatbots will handle routine customer service inquiries, allowing users to report issues, ask questions, or request services at any time. These systems will become more intelligent over time, providing faster and more accurate responses.</p>	<ul style="list-style-type: none">• Mobile apps will allow users to request services such as cleaning, repairs, or maintenance on demand. Customers will be able to track the progress of services, provide feedback, and manage their facilities more conveniently.

(Continued overleaf)



Social Factors

Trend	Implication for BWC
Societal Trends: These significantly impact our industries by shaping consumer expectations, influencing regulatory policies, and driving demand for sustainable, efficient services.	<ul style="list-style-type: none">• Need for BWC to monitor social trends by engaging with its shareholder, clients, networks and trade bodies.
Global Political Trends: Geopolitical conflicts and shifting power dynamics will influence our sector. These impacts can be both direct and indirect, affecting global supply chains, regulatory priorities, resource availability, and market dynamics.	<ul style="list-style-type: none">• Need to manage the risks within its supply chains and recyclate revenue.• Need to be flexible to changing market conditions.• Need to improve its energy efficiency to build greater resilience to fluctuating energy costs.
Devolution and Regional Collaboration: Greater devolution of powers to Bristol and the West of England Combined Authority (WECA) is likely, giving the city more control over funding and policies.	<ul style="list-style-type: none">• Need to explore opportunities to collaborate with partners across the West of England to create opportunities for integrated solutions.
Local Politics: The political landscape in Bristol over the next decade is expected to focus on sustainability, housing, social equity, and economic resilience, all influenced by growing public engagement and progressive agendas.	<ul style="list-style-type: none">• To remain apolitical and have a good working relationship with the administration and officers.• To remain committed to the One City Approach.
Public Engagement and Transparency: Increasing demand for participatory governance and accountability will push local leaders to involve citizens in decision-making.	<ul style="list-style-type: none">• Need to reflect public sentiment, ensuring services meet community needs.
Sustainability and Climate Action: Bristol's commitment to achieving net-zero carbon emissions by 2030 will drive policies prioritising waste reduction, recycling, and green infrastructure.	<ul style="list-style-type: none">• Need to innovate and adopt sustainable practices to support these goals, aligning with public and political expectations for environmental leadership.
Housing Development and Urban Density: The construction of 3,000 homes annually, primarily high-density flats, will challenge waste management logistics. Local politics will focus on affordable and sustainable housing, requiring waste services tailored to urban living and compact housing designs.	<ul style="list-style-type: none">• Adapt its collection methods for non-standard dwellings. Share its insights and expertise with developers to optimise environmental services and FM at the design stage.
Social Equity and Inclusion: Addressing high levels of inequality in the city will remain central to local politics. Policies will reflect the city's diverse population, emphasising community engagement and tailored service delivery.	<ul style="list-style-type: none">• Workforce development and social value should be directed to support disadvantaged communities in the city.• Operations and strategies to account for under-investment in underserved communities to provide equitable access to services.
Increasing Diversity: The 2021 Census showed that Bristol is also an increasingly ethnically diverse city, with 91 languages spoken, and approximately 18.9% of the population are Black, Asian and Minority Ethnic groups.	<ul style="list-style-type: none">• Workforce should reflect the diversity of the city.• Need to develop partnerships with communities to provide opportunities to broaden the take up of roles within the business.• Behaviour change campaigns, community engagement and communications to reflect the diversity of the city.
Ageing Population and Long-term Conditions: More than 81,000 (17.2%) people in Bristol have long-term physical or mental health conditions or illnesses whose day-to-day activities are limited. Disability prevalence increases with age. (Census 2021 Population Profile - Disabled population).	<ul style="list-style-type: none">• BWC should incorporate aging and managing long-term conditions into its workforce planning.• BWC should factor in the growing need for assistance into its operational delivery.

Environmental Factors

Trend	Implication for BWC
Sector Trends: Our sector impacts the environment in both negative and positive ways. Negative effects include air pollution from fossil fuel-powered trucks, methane emissions from landfills, plastic pollution, and resource depletion from inadequate recycling. However, the industry can have positive environmental outcomes through recycling, waste diversion, and waste-to-energy technologies that reduce landfill waste and conserve resources. Additionally, composting organic waste helps lower methane emissions, while sustainable practices like electric vehicles and advanced sorting technologies can further reduce the environmental footprint of waste collection.	<ul style="list-style-type: none">• A need for a robust sustainability strategy and action plan to mitigate impact and adapt to changing climate.• A need for KPIs that reflect our environmental and sustainability priorities and impacts.• A need for environmental factors to be incorporated within our communications and engagement.• A need for all investments and developments to consider the impact on the environment and include future risks.
Impact of Climate Change on the Business: Within the next decade and beyond the impact of climate change is predicted to bring increased extremes of weather, resulting in flood risk, red weather warnings and changes in air quality standards.	<ul style="list-style-type: none">• A need to periodically review climate risks and incorporate mitigations into our business continuity plans, and capital investment plans.• Avoid complacency to the changing climate.• Utilise innovation to adapt to future challenges.
Meeting Net Zero: BCC aims to be net zero ahead of the UK government target, with the council being operationally carbon neutral by 2030 and through the One City Plan, the wider city accelerating its progress. The Mission Net Zero project aims to accelerate Bristol's transition to net-zero emissions by addressing barriers such as funding and skill shortages. This initiative supports sustainable waste management practices and the development of infrastructure to reduce carbon footprints.	<ul style="list-style-type: none">• BWC must rapidly decarbonise its operations to meet net zero targets.• Need for a costed action plan.• Need for carbon to be considered for all plans and investments made.• Need for robust KPIs.• Need for carbon reduction target and milestones.• BWC must adapt its services to support the wider city to reduce its carbon emissions.
Just Transition and Workforce Dynamics: The concept of a Just Transition emphasises the equitable shift towards a sustainable economy. Bristol has a Just Transition Declaration ensuring that workers and communities dependent on high-carbon industries are not left behind.	<ul style="list-style-type: none">• Consider signing up to the Just Transition Declaration and consider the implications of doing so.• Consider taking a phased approach to incorporating the principles into its practices.
Circular Economy Initiatives: The UK is actively promoting a circular economy, focusing on sustainability and resource efficiency. Policies are being developed to encourage the reduction of waste and the reuse of materials, moving away from a linear 'take, make, dispose' model. This approach is evident in the ban on certain single-use plastic items and the implementation of strategies to promote recycling and waste reduction.	<ul style="list-style-type: none">• Continue to deliver services that are aligned to the waste hierarchy across all aspects of its business to increase waste minimisation, reuse and recycling.• Explore opportunities to expand its reuse offer with partners, adopt innovative practices and engage with residents and businesses.

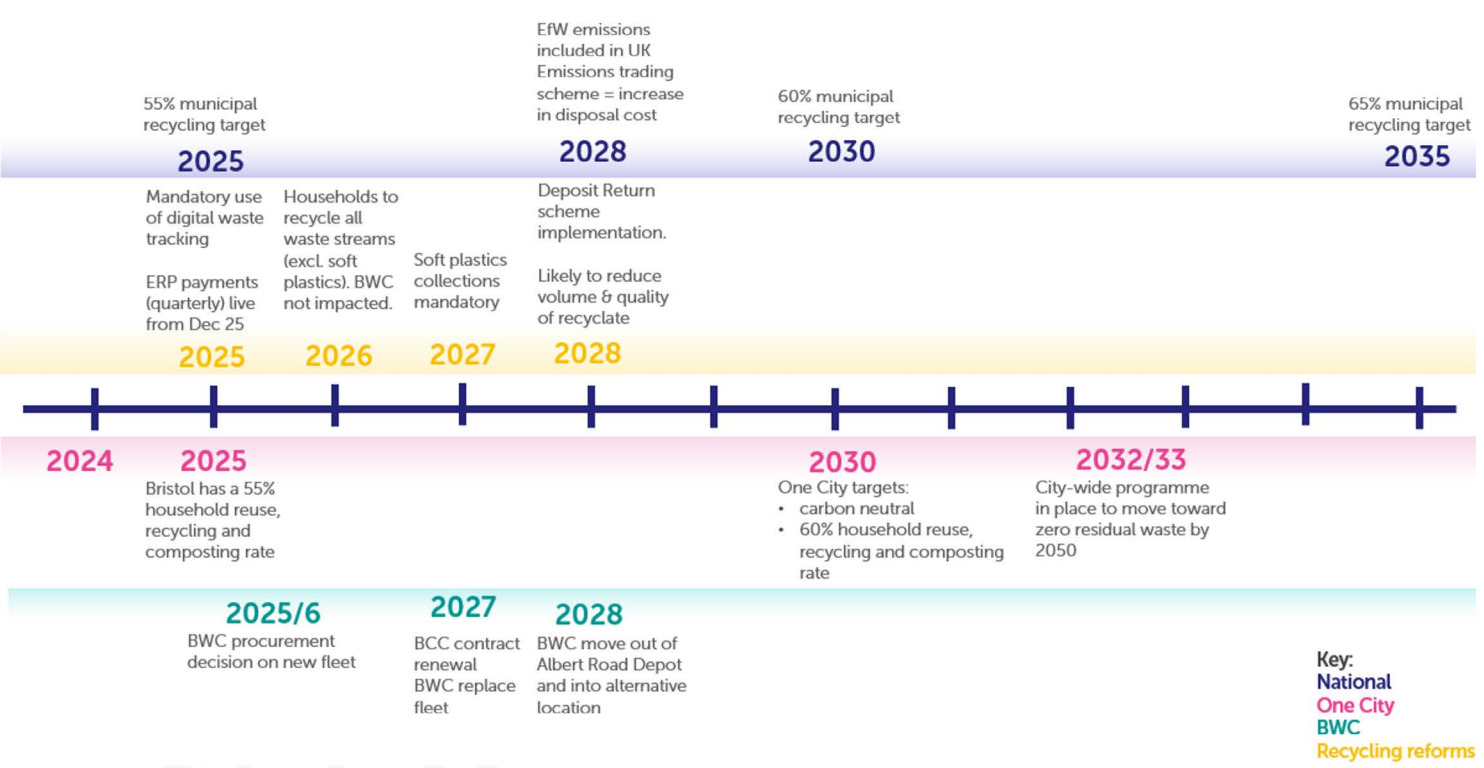
Appendix D – Trade Body Membership and Networks

BWC is engaged with the following organisations

- Bristol City Council (BCC)
- Bristol Climate and Nature Partnership (BCNP)
- Bristol Property Agents
- Bristol One City (BOC)
- British Institute of Cleaning Science (BICSc)
- British Institute of Facilities Management (BIFM)
- Business Improvement Districts
- Business West Initiative (Planning, Transport and Climate Group)
- Environmental Services Association (ESA)
- Design West
- Local Government Association (LGA)
- Chartered Institution of Wastes Management (CIWM)
- Sparks Bristol | Global Goals
- Waste and Resources Action Programme (WRAP)
- West of England Combined Authority (WECA)



Appendix E – Legislation Changes up to 2035



English Devolution White Papers

The Devolution White Paper, published on December 16, 2024, outlines significant reforms aimed at enhancing local governance in England. Key points include:

- **Enhanced Devolution Framework:** The government aims to make devolution available by default, rather than by deal, with a preference for areas to adopt a mayoral model.
- **Strategic Authorities:** New legal structures called Strategic Authorities will be created, with different levels such as Foundation and Mayoral Strategic Authorities.
- **Funding and Investment:** Introduction of Integrated Settlements for Established Mayoral Strategic Authorities, providing consolidated funding for local growth, skills, and housing.

BWC will explore opportunities that will emerge with the West of England Combined Authority (WECA) and neighbouring authorities offering advice and services on waste and meeting net zero targets.

Appendix F – One City Plan Collaboration Opportunities

Themes Key

Environment

Economy and Skills

Children and Young People

Transport

Homes and Community

Health and Wellbeing

Access to service 27/7

Theme: Environment

Year	Goal	Opportunity for BWC to Contribute
2025-26	Reduce residual household waste below 180kg per person and ensure that 50% of all household waste is sent for reuse, recycling or composting.	BWC will work with BCC on its new waste strategy by delivering projects, engagement activities and behaviour change campaigns that encourage and incentivise residents and businesses to reduce, reuse, recycle and compost.
2026-25	Bristol's physical, natural and social infrastructure protects high-density areas and the vulnerable from the impact of extreme weather events (e.g. flooding and heatwaves).	Working with our shareholders, we will continually review the risk of climate change and extreme weather events on BWC operations and services.
2026-25	Working with the Youth Council and schools across Bristol (schools have begun significantly reducing their material consumption).	BWC can utilise its community engagement team expertise of school engagement to broaden participation across Bristol schools.
2029-30	The volume of street litter that has to be collected has reduced since 2020 and the majority of people are happy/ content with the cleanliness of their streets.	BWC through its community engagement, Big Tidy and Street Cleaning team is collaborating with BCC, VCSE sector and wider community to sustain street cleanliness standards.
2030-31	Bristol is a Carbon Neutral and Climate Resilient City in accordance with the Climate Change strategy.	As a City Partner, BWC is a city leader paving the way to climate resilience.
2031-32	It is standard practice that major developments in Bristol are net carbon negative.	BWC is a trusted partner with developers and decision-makers and has shared its expertise to optimise the design and reduce embedded and operational carbon of these places for collections, street cleaning and reuse.
2032-33	The majority of communities understand their carbon emissions data and have used this to mobilise and take action.	BWC will incorporate technology and data improvements towards greater customer reporting and insights. Our marketing, communications and community engagement is supporting residents and commercial customers to better understand their carbon emissions associated with our services and the measures they can take to reduce impact.
2032-33	A city-wide programme is in place to achieve zero residual household waste by 2050, including measurements of material flow in and out of the city showing consumption and production.	BWC will incorporate technology and data improvements towards greater customer reporting and insights. Our marketing, communications and community engagement is supporting residents and commercial customers to better understand their carbon emissions associated with our services and the measures they can take to reduce impact.

Theme: Economy and Skills

Year	Goal	Opportunity for BWC to Contribute
2025-26	In line with the Bristol Women in Business Charter's aspiration to become a city with a gender-balanced workforce, organisations have put policies and structures in place to ensure an equitable opportunity is delivered for all women.	BWC is delivering dignity at work training, there is scope to extend this and explore how the charter may be adopted. Increasing the proportion of women in our frontline workforce is a key strategic aim of our EDI strategy.
2026-25	Specialist employment and training support is available for 16 to 24-year-olds facing more complex barriers e.g. care-experienced; young people with SEND; young parents; and those aged 55+ who need/ want to work.	BWC partner with local educators and VCSE sector to offer good-quality training and employment for people facing complex barriers. We will incorporate specialist employment as part of its future workforce development.
2026-25	There has been a 10% reduction in long-term unemployment and income deprivation in south Bristol following growth of employment and enterprise opportunities particularly in the cultural, digital and low carbon sectors within those communities.	As part of our recruitment and EDI strategies we are creating pathways to support under-represented groups into employment, which also includes individuals unemployed. We partner with enterprises that specifically support unemployed, for example Seetec, and there are further opportunities we will explore.
2026-25	Promote businesses to reduce their Scope 3 indirect greenhouse gas emissions through the use of the local supply chain for low carbon and sustainable goods and services.	BWC's Sustainability Policy and Plan sets out monitoring reduction plans for carbon emissions including Scope 3. By collaborating with partners like Mission Net Zero and Bristol Climate Nature Partnership, BWC can share its expertise to encourage and support businesses in the city to reduce Scope 3 emissions associated with environmental services and soft facilities management.
2026-27	Maximise economic development at Avonmouth, building on its location advantages and sectoral strengths, and through improved public transport access.	BWC is an active partner in SevernNet championing the need for inclusive economic development and improved public transport. Investments in Avonmouth will create employment for local residents.
2026-27	100% of large businesses and 50% of SMEs operating in Bristol have adopted a carbon reduction plan to address their Scope 1, 2 and 3 emissions, working with business support partners/ agencies to engage businesses and monitor delivery.	BWC's Sustainability policy includes a carbon reduction plan across Scopes 1, 2 and 3. BWC is supporting its commercial customers and wider business community through city partnerships to reduce their carbon emissions associated with environmental services and soft facilities management.
2028-29	Flexible working conditions, paid time to care and, at a minimum, agreed payment of the Real Living Wage, are now included in all corporate social value policies as part of the Social Value guarantee.	BWC continues to pay the Real Living Wage, and has a flexible working policy. We will be monitoring uptake of flexible working arrangements and encouraging use of them. As part of our review of our family-friendly policies we will consider paid time to care and other support mechanisms.
2030-31	Measurable increases are consistently recorded in the number of women entering and remaining in employment in the green, digital and new build economies.	Increasing the proportion of women in our workforce is a key strategic aim of our EDI strategy.
2033-34	The number of businesses with B-Corp Status has increased by 50% from 2023 levels.	As a responsible employer, BWC will explore B-Corp status and adopt best practices from the scheme.
2024-35	Earnings inequality between lowest and highest earners in the city has reduced by 30% compared to 2019 figures, as measured by the Gini Coefficient.	Annually we report on our gender pay gap, and we will extend this to include ethnicity pay gap, we will also analyse the gap between the lowest and highest paid.

Theme: Children and Young People

Year	Goal	Opportunity for BWC to Contribute
2025-26	A One City work experience scheme has been established to help care leavers, refugees, migrants and young people living in socio-economic deprivation to receive meaningful opportunities.	BWC has already taken part in a successful pilot with ACH to recruit refugees and migrants which has resulted in two new recruits, with opportunity to expand on this programme.
2028-29	280 Bristol companies have pledged to provide quality work experience to children in the city who traditionally have less access to such opportunities.	We currently have an ageing workforce, and as part of our EDI strategy we will be promoting opportunities; employment, work placements, apprenticeships to the youth of Bristol, collaborating with One City partners.
2030-31	Bristol's education infrastructure is carbon neutral, including school buildings, and there is a comprehensive School Streets initiative and increased active and sustainable travel for children and young people.	BWC is supporting its commercial customers and schools to reduce their carbon emissions associated with environmental services and soft facilities management.
2032-33	The apprenticeship offer in the city has improved since 2020, and the percentage of apprentices in Bristol is more equitable and above the Core Cities average.	We will ensure we optimise use of the Apprenticeship levy and provide apprenticeship opportunities across the city.

Theme: Transport

Year	Goal	Opportunity for BWC to Contribute
2026-27	Ensure that the majority of Bristol's public sector, taxi and private hire fleet and the majority of all cars are battery electric vehicles and are fully accessible.	BWC will seek to increase electricity capacity at its new sites to accommodate a transition to electric/hydrogen fleet. BWC operate electrical cars and vans wherever practical as part of our fleet procurement strategy.
2033-34	Driverless vehicles are becoming common place in the city to improve movement of people and goods with safeguards in place to support vulnerable groups travelling within Bristol	Where appropriate, BWC can offer its operations as a test bed for driverless vehicles.

Theme: Homes and Community

Year	Goal	Opportunity for BWC to Contribute
2028-29	Following successful work with the Keeping Bristol Safe Partnership, less than half of people living in the most deprived areas feel that anti-social behaviour is a problem locally.	BWC delivered excellent security, street cleansing and services and Big Tidy to improve the streetscape in the most deprived areas in Bristol to improve community wellbeing.
2029-30	In line with the UN Sustainable Development Goals 2030 ambition, Bristol is well on its way to being free of modern-day slavery (150 cases in 2020).	BWC has robust policies and systems in place to be free of modern-day slavery throughout its supply chain.
2030-31	20,000 low carbon new homes have been built (8,000 affordable) since 2020.	BWC is a trusted partner with developers and decision-makers and has shared its expertise to optimise the design of these places for collections, street cleansing and reuse.

Theme: Health and Wellbeing

Year	Goal	Opportunity for BWC to Contribute
2030-31	The design of the built and natural environment contributes to improving public health and reducing health inequalities as standard.	BWC is sharing its expertise to encourage best practices for environmental services and soft facilities managers.
2030-31	The health and care system services and supply chains are carbon neutral and are prepared for future climate conditions and hazards.	BWC is providing services within the health and care system and is making positive contributions to decarbonise their supply chains.
2033-34	All organisations in Bristol are committed to adopting and implementing the Mental Health at Work core standards including providing time to care for employees.	Mental health best practices are embedded across the business, supported by a team of Mental Health First Aiders and wellbeing resources, free and accessible to colleagues.

Theme: Access to Services 24/7

Year	Goal	Opportunity for BWC to Contribute
2033-34	100% of public sector transaction services can be conducted online 24/7 improving citizens' ability to access services outside of traditional working hours.	BWC is utilising apps and chat bots to streamline its customer services.



DOCUMENT CONTROL

Issue No: 4

Date: March 4 2025

Document Title:
10-Year Vision

Prepared For:
Shareholder

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