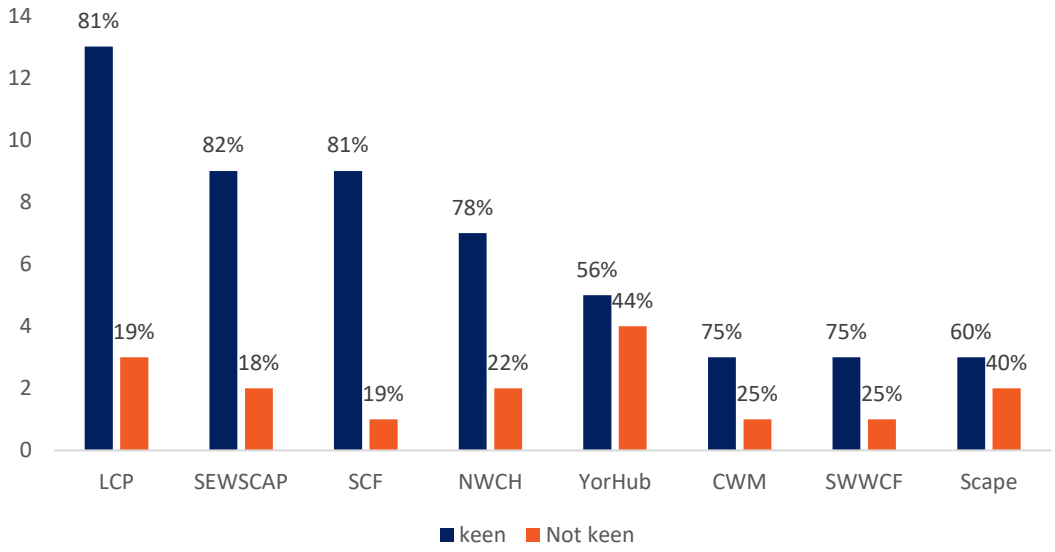
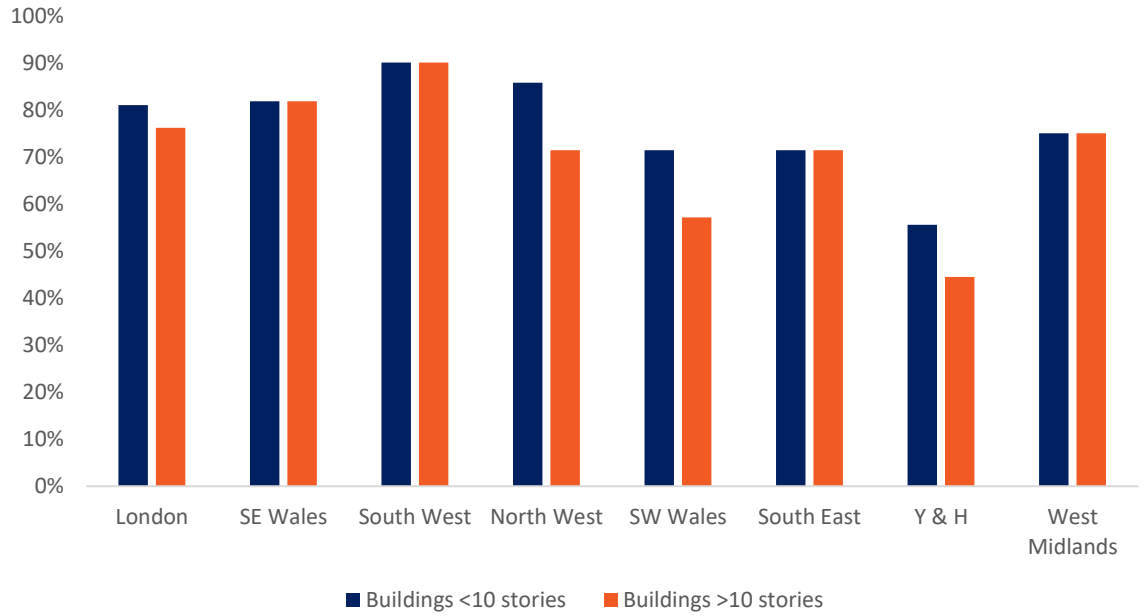
NACF - High Rise Buildings Re-Clad Capacity Survey

Overall Survey Analysis

NACF Partners (Count & % of Contractors)



Responses (% Showing Interest per Region)



8 NACF partners took part in the survey, covering **7 Regions** in the UK. This includes responses from 9 out of the top 10 largest Contractors in the UK, many of which are across number of frameworks in the country. The highest responses received from **LCP, SEWSCAP, SCF, NWCH and YORHub**. **80%** of the NACF Contractors have the appetite and capacity to deliver the recladding program, whilst only **20%** said its not their area of interest.

This above shows the percentage of Contractors keen on the scheme for the responses received per region. **South West 90%** - shows that 90% of the Contractors have keen interest in the scheme. Whilst Y & H shows a **56/44%** split.

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Estimate of capacity to accept orders Per Annum (average per Contractor)

Buildings <10 storey

Regions	Low Estimate	High Estimate
SE Wales	2	5
SW Wales	1	4
North West	3	7
West Midlands	3	13
South West	4	6
South East	4	5
London	5	8
Y & H	4	15
National Average	**3**	**8**

The average No of orders for **Buildings <10 Stories** varies across the Regions. The national average is **3** for Low Estimate and **8** for High Estimate.

Buildings >10 storey

Regions	Low Estimate	High Estimate
SE Wales	2	4
SW Wales	2	3
North West	2	7
West Midlands	2	6
South West	2	4
South East	2	4
London	3	6
Y & H	3	7
National Average	**2**	**5**

With **Buildings >10 Stories** shows a national average of **2** for Low Estimate and **5** for High Estimate.

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Lead Times across the Regions (average weeks)

Buildings <10 storey

Regions	Low Estimate	High Estimate
SE Wales	17	29
SW Wales	18	29
North West	15	26
West Midlands	10	20
South West	24	31
South East	18	25
London	15	27
Y & H	11	18
National Average	**16**	**26**

The data shows that **Wales and the South West** have the highest lead times, whilst **Yorkshire & Humber** with the lowest of **Buildings <10 Stories** . The national average is **16 weeks** for Low Estimate and **26 weeks** for High Estimate.

Buildings >10 storey

Regions	Low Estimate	High Estimate
SE Wales	16	27
SW Wales	18	26
North West	17	24
West Midlands	13	23
South West	20	33
South East	24	30
London	16	28
Y & H	13	21
National Average	**17**	**27**

For **Buildings <10 Stories,** there is just a slide difference of **1 week** for both the Low and High Estimate. The data shows that the **South East and South West** have the highest lead times. Its shows a national average of **17 and 27 weeks** respectively.

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Supply Chain Analysis

763 Suppliers Identified across 7 Trades Nationwide

Analysis on Trades Nationwide	
Trade	**Regional Used**
Scaffolding	A major firm is being utilised by 6 Regions in the UK
Mast Climbers	Two major mast climbers are shown to be used by 5 Regions
Cladding Contractors	A major cladding trade is being utilised by 4 Regions in the UK
Cladding Manufacturers	A cladding manufacturer is supplying 7 Regions in the UK
Windows	There is a variety in window suppliers, which shows no single supplier is being utilised by over 2 Regions
Fire Doors	A fire door specialist is supplying 5 Regions nationally
Fire Detection	A major well known supplier is used by 7 Regions in the UK
Security	A security specialist is utilised by 5 regions in the UK

Key Local Risks

In the **North West** a supplier is being utilised by **5 Contactors**

In **Y & H** a major cladding manufacturer is supplying **7 Contractors**

In **Wales** a major scaffolding company is being used by up to **5 contractors**

In **London** a trade Security specialist is being utilised by up **10 Contractors**

In the **South East & South West** a fire detection trade is being used by **5 Contractors**

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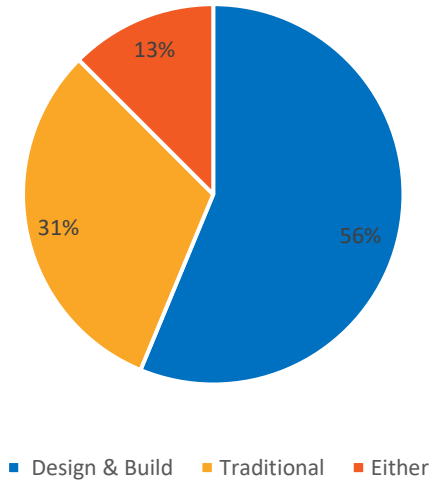
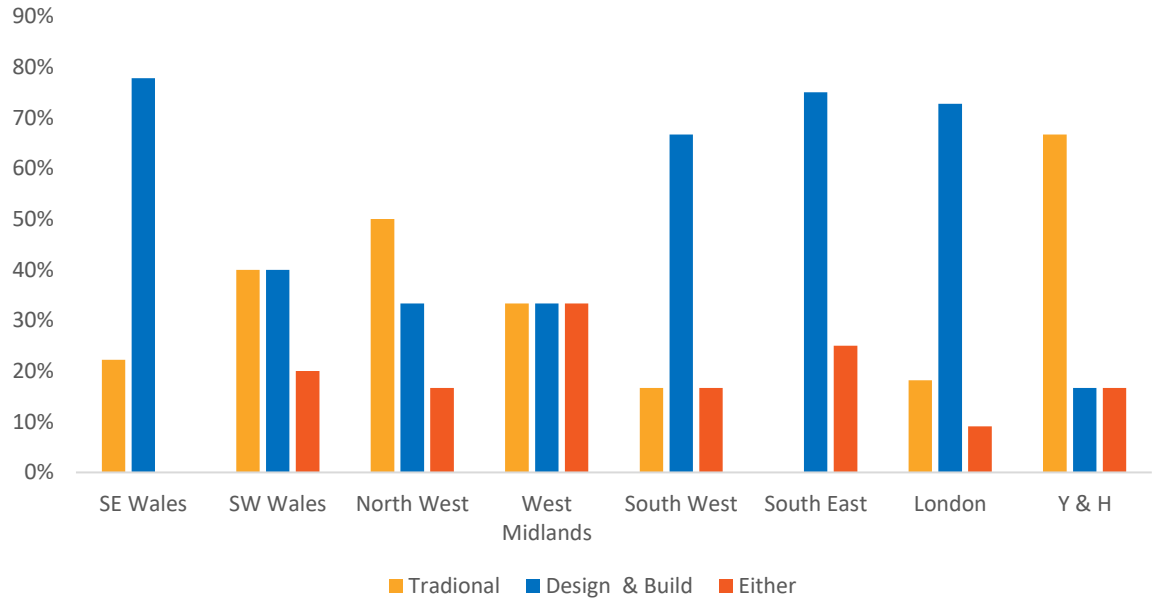
Procurement Route

Procurement Preference Nationwide (%)



There is a mixed feeling amongst the Contractors on the procurement route for the Scheme. **56%** preferred **Design & Build**, whilst **31% Traditional** and **13% Either.** However, most of the Contractors have commented that they have been through both Traditional and D & B form of contract and are open for discussions with the Client to their specific requirements and agree on the right procurement route. The major Contractors preferred **2 Stage tendering** - they said this provides sufficient opportunity for surveys and investigations to be carried out and defines risk in detail.

Procurement Preference Breakdown per Region (%)



There is difference amongst Contractors in the regions across the nation. Contractors in **London and the SE** preferred **Design & Build - 2 Stage**, whilst **North West and West Midlands** shows an average **50/50 split**. In **Y & H** the preferred route is **Traditional**.

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Further Data Analysis

Basis of interest to the Contractors

- Two stage tender - shared risk
- Collaborative approach and early input of delivery contractor
- Input into design stage and team selection
- Volume of work
- Framework procurement route
- Previous high rise cladding experience

Commercial Risks

- Supply chain insolvency risk
- Covid-19 and insurances
- Ensuring building compliance with current standards
- Design responsibility
- Responsibility for the condition of the existing structure / fabric
- Discrete design of cladding packages

Top 7 Challenges

- Live Environment - Public safety
- Covid-19 risk impact on the Supply Chain
- Existing structure – Asbestos
- Tenant Liaison – Community Engagement
- Design responsibility and risk allocation
- Managing logistics whilst ensuring minimal impact to occupants
- The unknown and unseen works on removal of existing cladding facade – which can increase budget

Top 7 Opportunities

- Betterment in costs due to large quantities of the same materials
- Unprecedented volumes of compliance-driven work
- Legacy
- Community development and social value
- Potential for rolling programme and maximising of lessons learnt
- Collaboration across the supply chain
- Chance to for the construction industry to show how it adapts to make the communities in which we live safer places