PART L: IS THE CONSTRUCTION SECTOR READY?

Research from Marley | May 2022

Marley

INTRODUCTION

As we continue the journey towards a net zero future, how the construction sector imagines and constructs the homes and buildings we live and work in is set to play a pivotal role in meeting the Government's 2050 target.

With the Climate Change Committee outlining that 14% of the UK's greenhouse gas emissions emanate from the country's 28 million homes, building regulation policies, creative design, and innovative product solutions will collectively become increasingly essential in helping to drive the much-needed sustainability agenda.

The ultimate strategy is to develop energy efficient, low carbon dwellings that can make a substantial contribution towards efforts to halt and reverse the environmental damage fuelling the climate emergency.

And in this regard, stakeholders - politicians, industry leaders, regulators, the architectural and specification professions, housebuilders, and product suppliers - must all take responsibility for achieving the collective ambition.

2022 marks the next milestone on the journey. Changes to Part L of the Building Regulations become a reality and will provide the new benchmark for the design and building standards for energy performance and carbon emissions of new and existing buildings.

The introduction is an interim measure ahead of the launch of the Future Homes Standard in the middle of the decade and, as such, is a key steppingstone for the industry.

As laid down by policy makers, the immediate objective of the interim Part L changes is to ensure that new homes are constructed to produce 31% lower carbon emissions going forward.

This significant move sets a number of challenges as the sector readies itself for future compliance and a transformative move into a new era.

To investigate how prepared key stakeholders are; their confidence in delivering what is being asked, and to gather important insight around awareness and uptake of sustainable product solutions such as solar PV, Marley conducted research with architects, specifiers, and housebuilders to ask the questions that matter about Part L.

Marley

EXECUTIVE SUMMARY

Marley's survey of architects, specifiers, and housebuilders highlights several issues connected to the imminent introduction of the interim update to Part L of the Building Regulations. They include:

- Current low levels of awareness of the impending Part L changes across the construction sector, leading to concerns about the industry's readiness for future implementation.
- A sizeable majority of those questioned say they do 'not feel confident' or are 'unsure' about their new responsibilities ahead of the rule revisions.
- The acknowledgement that sustainable technologies - including solar PV - are playing important roles in helping to produce low carbon and energy efficient housing, but the conclusion that solar PV specification needs to increase further as a proven method by which to satisfy the short-term targets set by Part L.
- The three main challenges to implementing Part L are cost pressures, an absence of skills to implement the required solutions, and the low understanding of sustainability among industry clients.
- Specifier recognition that suppliers looking to collaborate with the industry must increasingly prioritise and communicate their own sustainability credentials and actions. They must also seek to deliver added value benefits such as extended warranties on product solutions to remain relevant and viable in a rapidly changing commercial landscape where sustainability will be a key driver.

PART L, SUSTAINABILITY, AND SOLUTIONS

With the uplift to Part L of the Building Regulations viewed as a critical next step in the delivery of energy efficient and low carbon buildings, Marley's research uncovered concerning insight ahead of its implementation in June 2022.

A considerable proportion of architects, specifiers, and housebuilders admit to being 'unaware' of the changes outlined in Part L. According to the research, around two thirds said this was the case, with 50% of housebuilders, for example, saying they are 'not aware' or were 'unsure' of the changes.

This apparent lack of knowledge is further supplemented by confidence levels when it comes to Part L and company responsibilities.

From a housebuilder perspective, around two thirds said they are 'not confident' or 'unsure,' whilst the figure rises to 79% for architects and specifiers who are at the forefront of designing-in the implementation of Part L. Worryingly, just over one in ten (14%) agreed that they feel 'confident' ahead of the implementation of Part L.

For those that expressed knowledge of what Part L requires, three key areas are pinpointed as the primary challenges to implementation. 'Cost pressures,' 'a lack of skills to implement the changes', and 'low levels of client understanding around sustainability' scored the highest. Of these, 'cost pressures' was identified by 46%.

The role of solar

A solar PV roofing system is widely acknowledged to be an important product solution to help produce the low carbon and energy efficient housing required in the future. Experts say that home energy efficiency set out in Part L cannot be delivered by enhancements to the building fabric alone. It is therefore expected that the specification of solar PV, together with an efficient gas boiler or heat pump, will provide the quickest and most cost-effective way for the sector to meet the immediate Part L 31% carbon reduction obligations.

In this regard, the research tackled the perception and the positive role solutions such as solar PV can play in a sustainable future. Two fifths of those surveyed said they are already aware of the impact solar has as a sustainable technology within the overall building fabric. However, another 40% admitted that they are 'not aware' of solar as such a solution.

SPECIFICATION PROCESS

Specifiers are set to be central to the success of the ambition that lies behind Part L. Correct product choices can help drive the sustainability focus forward and the process of identifying and selecting appropriate, high performing and proven solutions will grow in importance.

Marley's research asked about both supplier sustainability credentials and the role of extended warranties when specifying construction materials.

When probed about product specification considerations around sustainable construction and reducing carbon emissions, the issue of having an extended warranty when selecting solutions was seen to be 'very important' by nearly half of those questioned. The specification 'peace of mind' delivered by added value benefits such as a product's extended warranty is clearly an appealing attribute.

In addition, product suppliers demonstrating a strong commitment to their own sustainability journey are also more likely to find favour with the architectural and specification sector. Three quarters (73%) consider this issue to be 'very important/slightly important' when it comes to selecting a product manufacturer or supplier to work with.

With construction methodology and product origins increasingly under a sustainability spotlight, it appears from the research that the sector's supply chain must respond accordingly. Proof of developing and sustainable practices in how a supplier operates on a daily basis, as well as product manufacture that is mindful of its environmental responsibilities, are currently seen as key factors in the specification process. This will only continue to strengthen in terms of importance in the future according to the poll's findings.

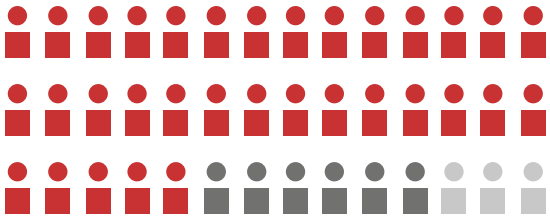
KEY FINDINGS

Understanding Part L

Ahead of the introduction of interim changes to the uplift in Part L of the Building Regulations, Marley conducted research with more than 200 architects, housebuilders and specifiers to gauge their understanding.

Confidence

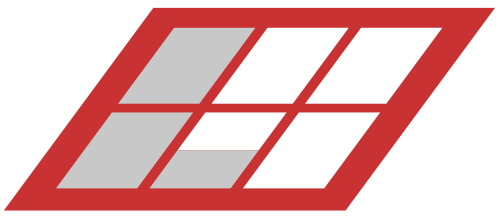
Questioned about confidence levels associated with Part L:



79% 'do not feel confident' or are 'unsure' about the changes and their responsibilities, **14%** agreed they felt 'confident'.

Spotlight on Solar

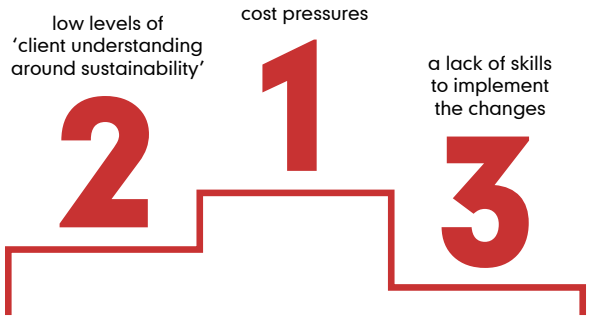
When asked about the role solar PV can play in supporting the **31%** reduction in carbon emissions, outlined in Part L:



40% are already aware of the role solar PV can play within the overall building fabric. However, more than **40%** are 'not aware' of solar.

Challenges

The top three challenges surrounding the successful implementation of Part L are:



Supplier Support

Looking at the supply chain, and its role in supporting sustainable product selection and construction, architects, specifiers, and housebuilders said that:

An extended warranty when selecting solutions is deemed 'very important' by nearly half.

73%

consider demonstrating strong sustainability credentials for a product manufacturer a 'very important/slightly important' factor.

For more information on the support available to architects, specifiers, and housebuilders looking to navigate Part L, visit: **marley.co.uk** or read our latest blogs: **marley.co.uk/blog**

Marley

CONCLUSIONS

Marley's exclusive research into current awareness levels and construction sector preparation for the arrival of Part L, has highlighted several issues that the industry, its regulators, and its supplier base need to acknowledge.

With just a month before Part L is implemented, the low level of awareness about the detail and its potential impact raises concerns.

With the need for more sustainable solutions an obvious priority for an industry at the forefront in the fight to deliver a low carbon future, the fact, according to the research findings, that significant numbers of architects, specifiers, and housebuilders remain 'unaware' of its impending arrival signposts that more needs to be done to both promote Part L, and help the sector identify and use the product solutions that will deliver sustainability success.

For those with Part L awareness, cost pressures, a skills gap, and the current low level of client understanding around sustainability-related issues and solutions, reinforces an urgent need. The industry must collaborate to tackle the technical and practical challenges that lie ahead to satisfy the short-term target of a 31% reduction in carbon emissions from new homes.

On a positive note, sustainable technology solutions such as solar PV are ready, tried and proven and can be an influential part of a holistic answer that the industry can deploy ahead of the Future Homes Standard in 2025.

Awareness of solar PV as a key technology to deliver greener and more efficient energy is on the rise according to the poll. Solar Energy UK predicts that Part L will lead to a five-fold increase in the level of solar PV specification as new homes are constructed.

This adds further credence to forecasts that the inclusion of solar PV as part of an integrated roofing system will deliver dividends to an industry looking for answers. It also supports homeowners seeking better energy efficiency at a time of escalating energy bills, as well as low carbon benefits as climate emergency worries are prevalent in the nation's consciousness.

Finally, the sector's supply chain must continue to respond to the sustainability call.

They can do this in two ways.

Suppliers must commit to a holistic and long-term programme of improvement around sustainability practice. All areas of operation must be able to validate such a commitment in ways that satisfy the increasing scrutiny of the specification market. Running in tandem, the providence of products, how they are manufactured and transported, and their long-term performance characteristics are set to become ways in which suppliers can differentiate themselves from the competition.

Research from Marley

Marley