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**Programme Area:** Buildings

**Project:** Building Supply Chain for Mass Refurbishment of Houses

**Title:** Appendix C – Stakeholder Interviews

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**Abstract:**

Please note this report was produced in 2011/2012 and its contents may be out of date. This document is an appendix of Deliverable 4.3 – Target Supply Chain Scenarios.

**Context:**

This project looked at designing a supply chain solution to improve the energy efficiency of the vast majority of the 26 million UK homes which will still be in use by 2050. It looked to identify ways in which the refurbishment and retrofitting of existing residential properties can be accelerated by industrialising the processes of design, supply and implementation, while stimulating demand from householders by exploiting additional opportunities that come with extensive building refurbishment. The project developed a top-to-bottom process, using a method of analysing the most cost-effective package of measures suitable for a particular property, through to how these will be installed with the minimum disruption to the householder. This includes identifying the skills required of the people on the ground as well as the optimum material distribution networks to supply them with exactly what is required and when.

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## **National installers of energy efficiency measures**

Lead generation is difficult, route to finance uncertain and in owner occupier sector certainty of payment is an issue. Mostly train workforce in house off the job followed by on the job training to achieve competence. Simplification of regulation would help, VAT rules complex for energy saving work. Developing links with energy companies. Pessimism about the market after CERT finishes. Some proactive activity through thermal imaging surveys. Can train new joiners within 6 months and could increase capacity quickly.

## **National replacement window and door manufacture / installer.**

Lead generation a problem, customers generally have 3 stages of work done, route to finance and certainty of payment an issue. Already offering solid wall insulation could extend product offering. Simplification of regulation and building control required. Investigating working with power companies. Could double capacity quickly as pool of skilled labour known and available.

## **Primary heat source manufacturers**

Technology for efficient running at a range of outputs in a unit is available across 10:1 range.

Modular approach is feasible for major modules. Flue gas heat recovery and warm feed to combi' boiler Ok. Different supply models, ie. Lease, rent, being considered. Power of the merchants hinders direct supply to installer / end customer.

## **Supply: Merchants / Logistics companies.**

Concern over who can sell retrofit outside energy companies and local authorities. VAT complex on energy saving work. Concern over liability over the long term, installer mistakes, longevity of installers, high risk of ongoing obligations. Backhauling of waste possible now. Interested in investing if retrofit is given the right backing, could expand role to include ownership of part of the supply chain.

## **Large Corporate National Players**

Already involved in decent homes. Access to sales route is an issue for owner occupier along with certainty of payment and access to finance. Could double capacity quickly due to credit crunch.

## **Insulation Manufacture**

Capacity to produce not a problem, this will follow the market; Investment will be made when demand is in evidence. Lead time to install extra capacity is not a problem. Thinner materials are possible but at a premium price. This will change over time.