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BUILDERS**

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FMB House Builders' Survey

2023



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Project by Modplan Building Refurbishment Contractors Ltd

Executive summary

The Federation of Master Builders' (FMB) annual House Builders' Survey aims to build a clear picture of the experience of micro, small and medium-sized (MSME) house builders in England. It is the only annual survey of its kind to do so. This report is set in the context of a dwindling market for smaller house builders in the UK, delivering only 10% of new homes, compared to 40% in the late 1980's.

Main constraints on supply

- The planning system is rated as the top major barrier holding back the delivery of new homes at 55%.
- Restricted mortgage availability becomes the second largest barrier with 51% of members picking this option, which is a steep rise over the last two years.
- Lack of available land, a new category, separating it from viability of land, is the third biggest barrier at 48%.
- Material costs are the fourth biggest barrier with 43% of members choosing this option, but members indicated this will fall to 23% over the next three years.

- The fifth most significant barrier holding back housing delivery is the lack of finance to the company at 42%.

Buyer demand

- Buyer demand is at its lowest level since 2015 (when the survey began recording this data), with an average score of 1.99 (rated out of 5, with 5 being very good and 0 being very poor).

The planning system is rated as the top major barrier holding back the delivery of new homes at 55%.

Planning application process

- Respondents once again rated 'Inadequate resourcing of planning departments' as the most significant cause of delay in the planning application process, followed by 'Inadequate communication by planning officers.'
- Cost imposed by delays in the planning system is the most significant cause of additional cost in the planning process.
- 45% of members have medium certainty in the planning process, with 32% seeing a low degree, and 11% a very low degree. When combined only 12% had a high or very high degree of certainty in the outcome of a planning application.

Small sites and land availability

- 63% of respondents report that the number of small site opportunities is decreasing, down from 82% last year, with 5% reporting that the number is increasing.
- 60% have reported that the process of obtaining planning for small sites seems to be getting worse.
- 59% of members do not believe that the NPPF requirements on local authorities to identify small sites is helping.

Workforce and skills

- 24% of respondents are planning to grow their on-site workforce over the next year.
- 12% are planning to decrease their on-site workforce.
- 57% will be keeping their workforce at roughly the same size.
- 50% of respondents said they would be upskilling their workforce.
- There was a slight decrease in those that reported to be hiring one or more apprentices with 36% in 2023 compared to 40% last year.



60% have reported that the process of obtaining planning for small sites seems to be getting worse.

Access to finance

- When asked to rate lending conditions to micro, small and medium-sized (MSMEs) for residential development from 0 to 5 (0 being very poor and 5 being very good), the average score was 1.84 – which is the lowest figure since 2017.
- 'Interest rates charged on new loans' was again rated as the most significant finance related issue restricting the ability to build new homes.
- Self-build/custom contracts are the most popular source of funding for a project (53%).
- 94% of members have indicated it's become more expensive to build over the last year.
- Of the 94% noted above that said it had become more expensive to build, 53% said it was around 20% more expensive, with 1 in 5 noting it was 30% more expensive per site.

The future of housebuilding

- 68% of members are aware of the Future Homes Standard.
- 55% have indicated that they think there will be increased costs owing to the Future Homes Standard.
- The majority of respondents indicated they are not at all confident about Biodiversity Net Gain (BNG) which comes into force next year (71%).
- 30% of FMB house builders want to understand who to talk to about BNG.

55% have indicated that they think there will be increased costs owing to the Future Homes Standard.



Project by D L E Construction Limited



Introduction and context

This survey helps to build a comprehensive understanding of the experience of micro, small and medium-sized (MSME) house builders in England which can be tracked over time.

New content in the survey

This year we have introduced a data dashboard for members to better show the range and type of housebuilder within FMB membership. This will help inform the wider data and should make understanding the findings easier. There have also been changes to the main barriers, particularly separating availability and viability of land and the addition of nutrient neutrality mitigation as a barrier.

MSMEs are part of the solution to build more homes

The FMB believes that MSMEs housebuilders are vital to solving the ongoing housing crisis. MSME

house builders used to deliver around 40% of new homes in the late 1980's. However, systematic failings across house building policy has resulted in that figure being in the region of 10%, according to the Government's own figures. This has pushed the UK to have an over reliance on large national developers, which in turn has resulted in an abnormal housing market within the European context.

Concerns over the future

There are concerns over the future of housebuilding, not only from a delivery standpoint, but related to the introduction of the Future Homes Standard, coming in 2025. Members for the most part are aware of it but do worry about the additional costs and barriers it may bring. Biodiversity Net Gain, which will be introduced in 2024, is also garnering concern among the FMB membership, with many not confident about the new scheme and unsure who to talk to about it.

What needs to happen:

Dedicated planning resources for MSMEs

Local authorities must be empowered to help micro and small house builders through the planning system.

Unlocking small sites

The NPPF needs to be given the 'teeth' to ensure local authorities are including small sites in local plans.

Better funding options

Improved funding options and resources from Homes England to help micro and small developers obtain financial products.

Respondent profile and industry structure

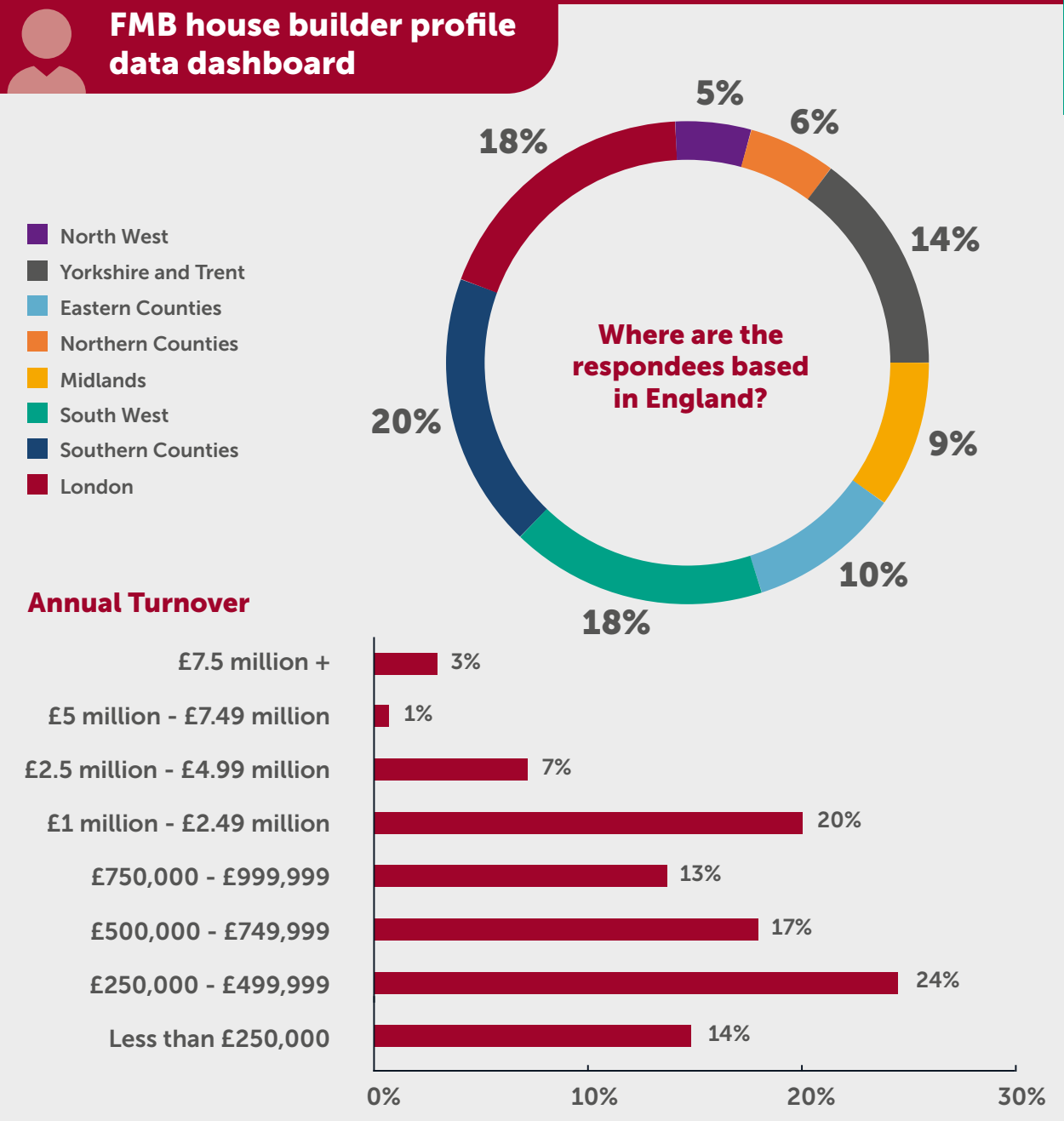
The profile of respondents to the House Builders' Survey is reflective of those parts of the FMB membership and the wider construction industry that are active in smaller-scale house building. In the FMB membership, 34% of its 7,000 members have indicated that they are interested or involved in house building activity.

Sample

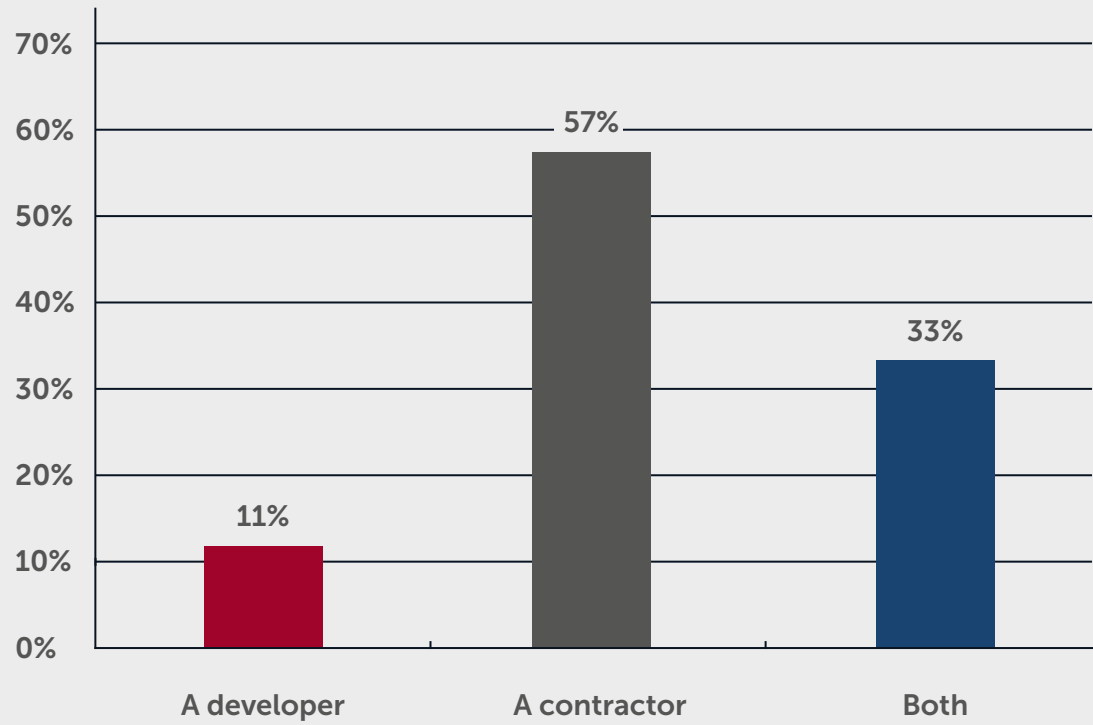
- The survey received 127 responses from MSME house builders in England.
- All respondents were FMB members in England who list house building as one of their trades and have built property in the last 10 years.



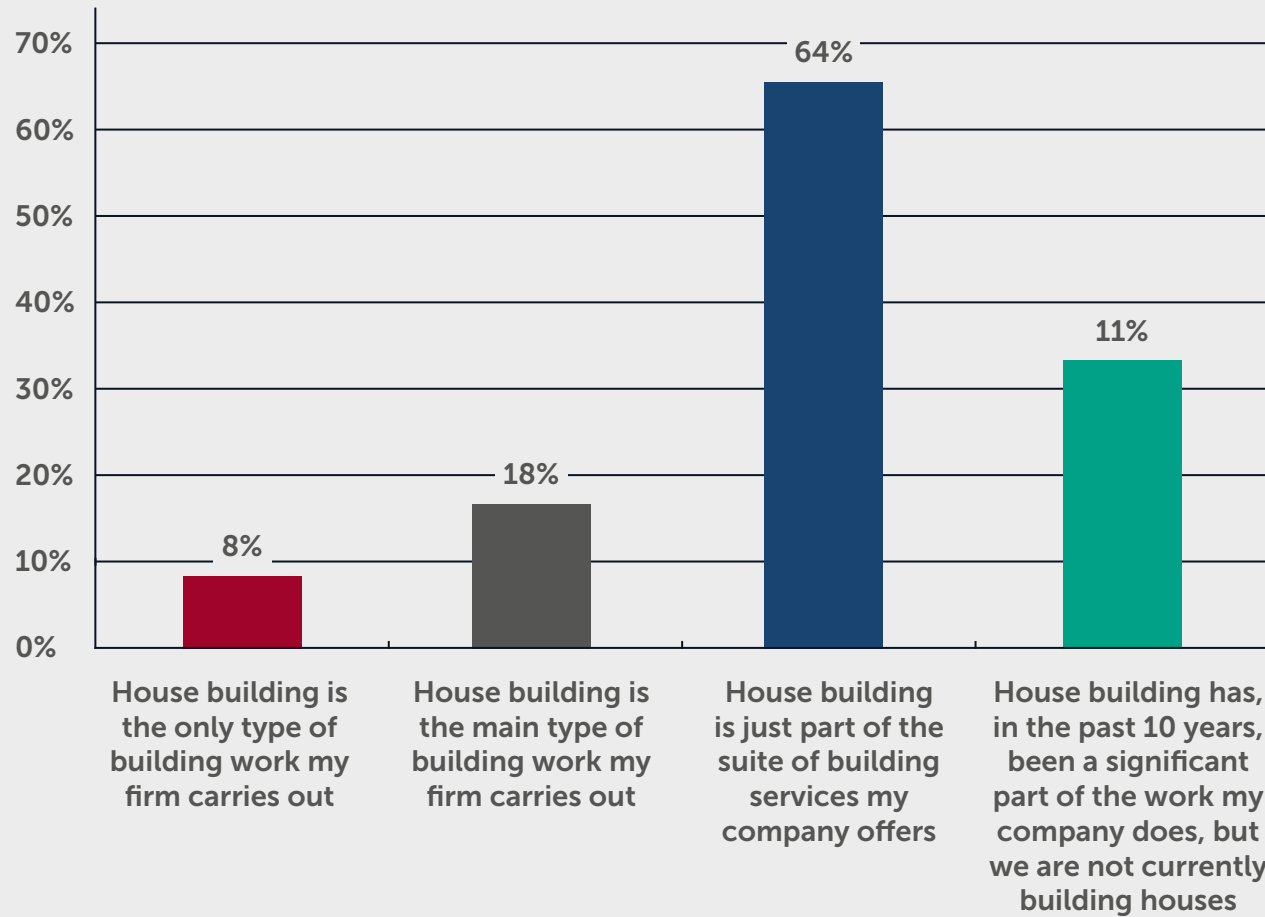
FMB house builder profile data dashboard



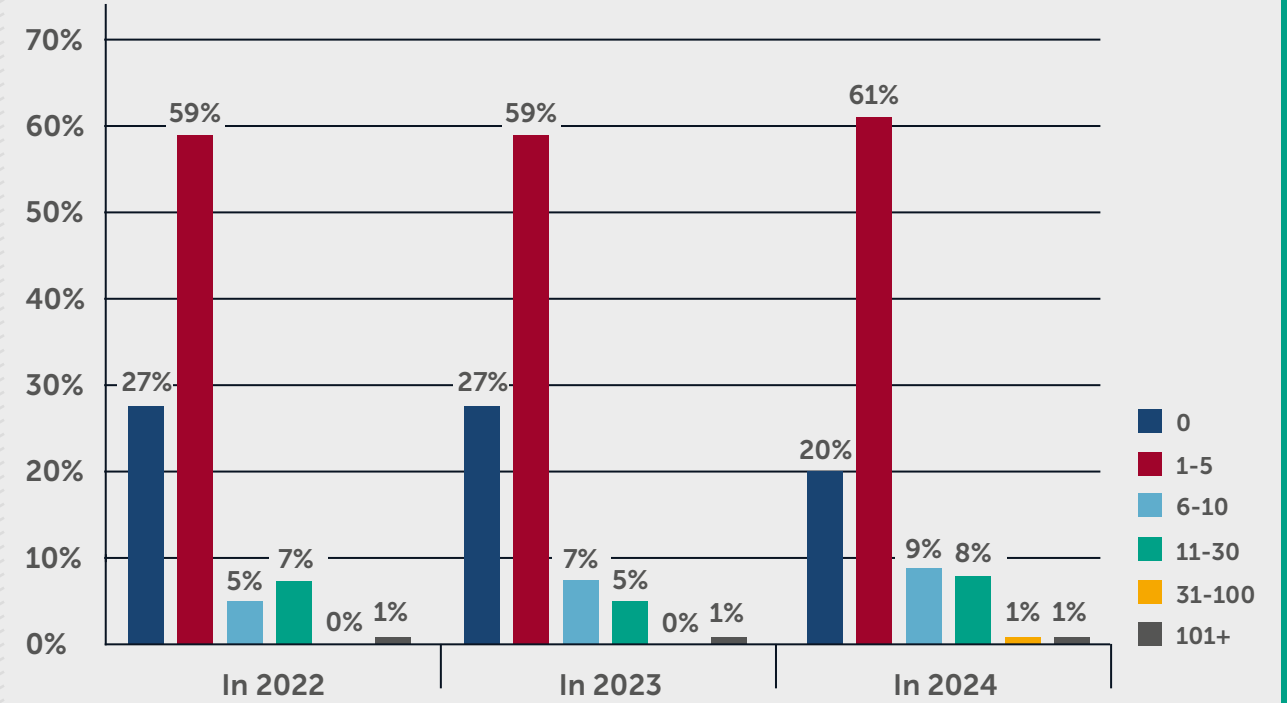
What type of house builder do our members identify as?



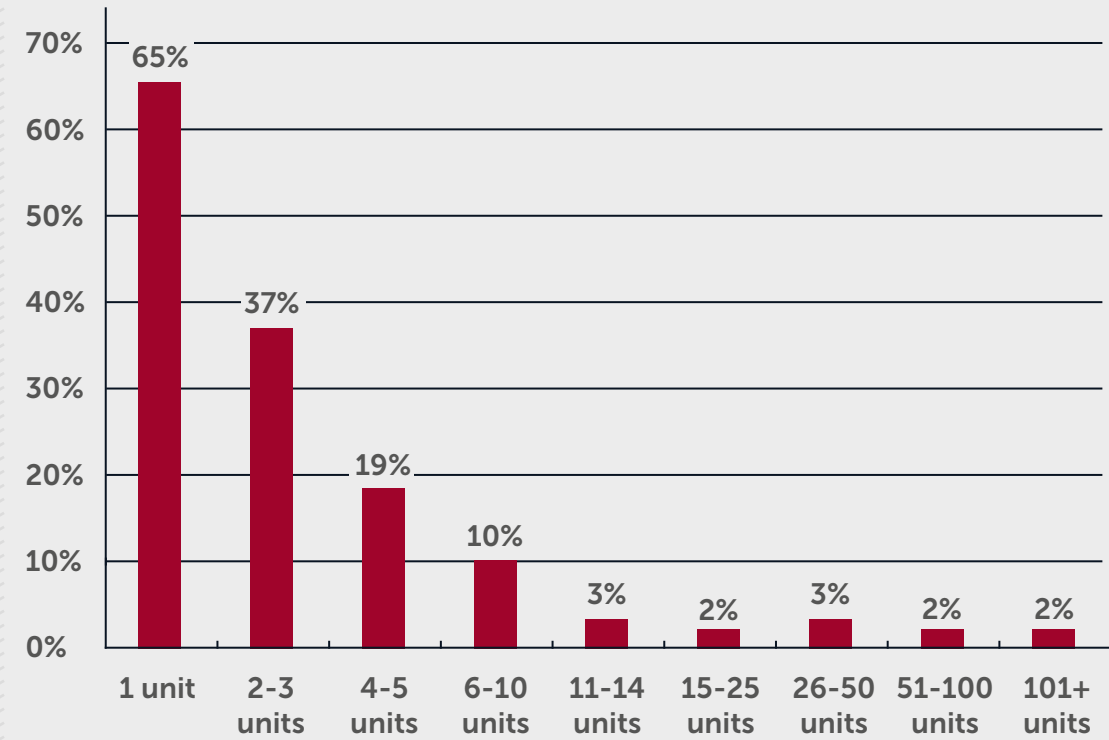
Which statement did our members choose to best describe their involvement in house building?



Approximately how many units per year have FMB members built, or expect to build?



What size sites do our members typically tend to build?



Main constraints on supply

There are a few changes this year to the main barriers we have been tracking over recent years. Graph 1 shows the main barriers, which is treated as a league table of barriers from first place to thirteenth, based on reported percentage this year. We have added nutrient neutrality as a barrier to understand better how it's affecting FMB house builders, and 'lack of available land' and 'lack of viable land' have been split into two separate categories. There is a new category called 'material costs' which has replaced material shortages to better reflect current market conditions.

Planning takes top spot as the biggest barrier to MSME house

builders, moving up from second place in 2022. One of the most interesting changes is the movement of 'restricted mortgage availability' moving up the table to become the second biggest barrier. Last year, this moved up from relative obscurity into the fourth spot, with members predicting it would become a bigger issue over the next three years – they were right.

Planning

Unsurprisingly, given anecdotal evidence and previous years' data, the planning system is the biggest barrier to small house builders. This is specifically the process of

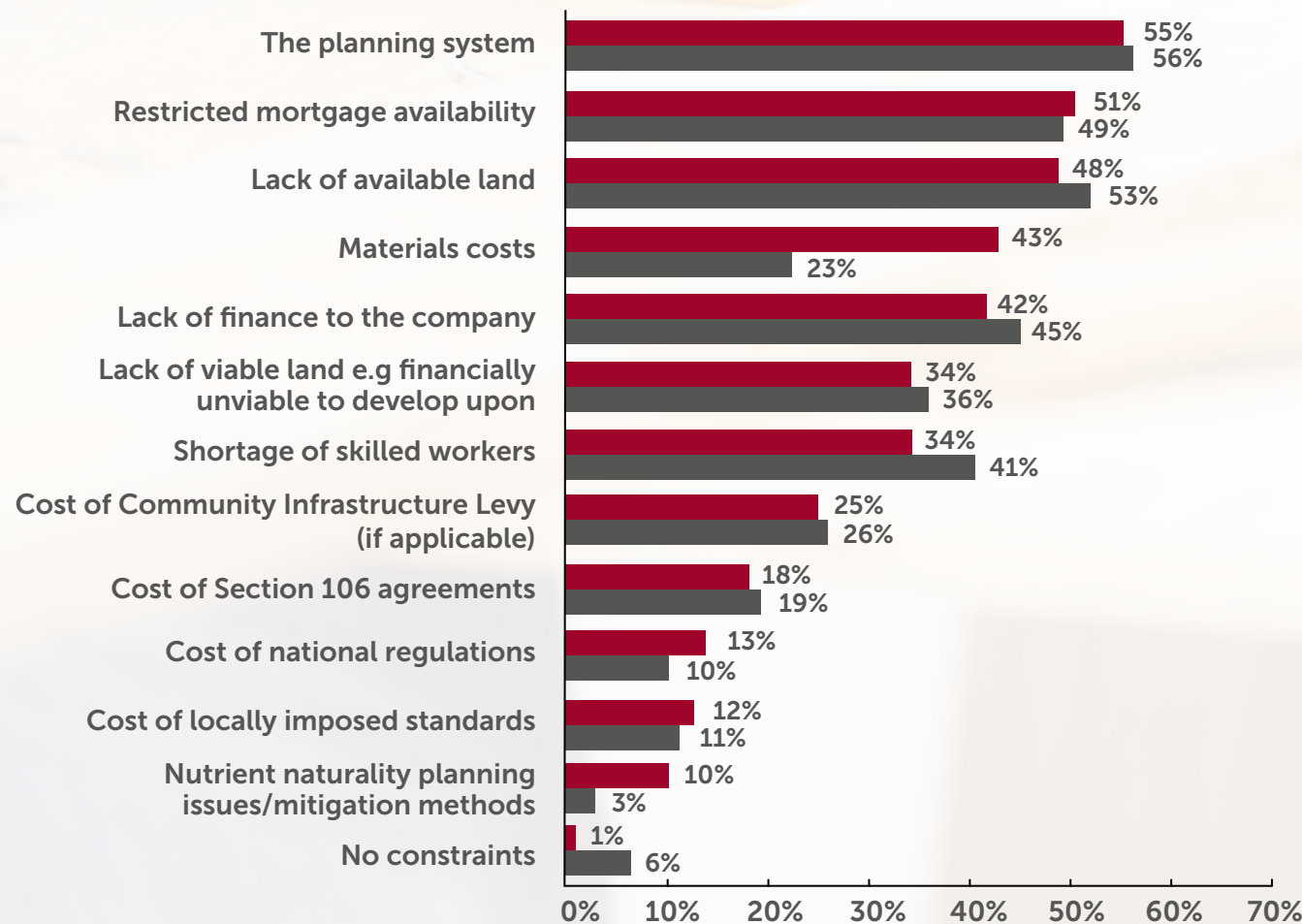
moving through the system, wider areas like section 106 and CIL are separate barriers, all featuring lower down the rankings (see graph 1). Planning is consistently a major barrier, and the planning section of this report will examine the specifics that are causing problems, such as the resourcing and communications of planning departments.

Economy

Certainly in the last few years, the wider economy has been harming delivery from smaller house builders. This is particularly clear in 2023, with 'restricted access to mortgages' rapidly rising into

Graph 1: Q What would you say are the main constraints, if any, on your ability to build more homes i.) currently and ii.) looking ahead over the next three years?

■ Current constraints
■ Next 3 years



fourth place last year and now sitting as the second biggest issue stopping housing delivery (see graph 1). This isn't surprising given the quantity of members that work as contractors and will therefore be heavily reliant on consumer demand to generate work and their ability to pay for housing. 'Lack of finance to the company' remains in place as the fifth biggest barrier, albeit with a larger percentage reporting it as a barrier, with material costs leapfrogging financial issues into fourth place.

Developers

Members that build houses as developers had a slightly different outlook compared to the overall picture. 66% found that planning was the largest barrier, with lack of available land being the second biggest barrier, cited by 50%. Restricted access to mortgages, lack of finance to the company, and lack of viable land were all joint third at 33%.

Long term trends

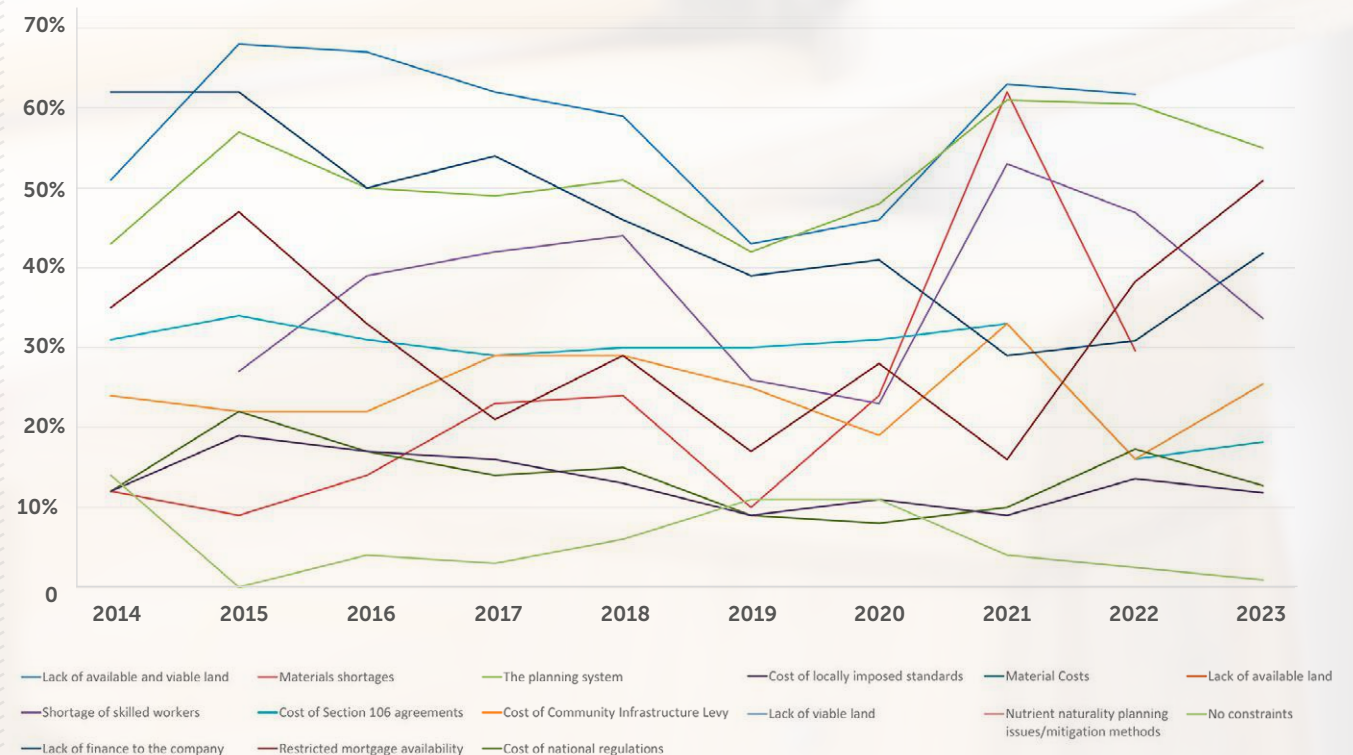
Over the period from 2014, the trends have remained largely consistent, with short term trends creating occasional spikes. Material shortages for example, ebbed away in importance over the pandemic years and were replaced by material cost issues, broadly considered to be related to inflation and manufacturing costs increasing. Interestingly, we have also seen skills shortages drop since 2021, when there was a boom in building activity following the easing of Covid Pandemic restrictions. The difficulty in recruiting may be easing, but it may also be that comparatively to other issues, skills shortages are easier to mitigate for, hence their decline in prominence as a barrier.

Looking ahead

There will be moderate movement in the top half of the table of barriers over the next couple of years with a few major barriers trading places either up or down. One of the largest declines appears to be materials costs, which looks set to fall into the bottom half of the graph (graph 1) over the next 3 years. This may be that FMB house builders suspect inflation will continue to decline over this period and be reflected in material prices. Shortages of skilled workers looks set to move slightly higher up the rankings. Anecdotally, this would appear to be a long-term fear that the industry is recruiting fewer and fewer people, so this may be reflected in the increased concern over the coming years.

"Reduce the number of expensive reports required before an application can be submitted along with making it much easier to discuss and negotiate a planning application to ensure you receive approval."
FMB member

Graph 2: Q. What would you say are the main constraints, if any, on your ability to build more houses? (Responses to this question from 2014-2023 surveys)





Buyer demand

Each year we assess how members feel towards buyer sentiment, how this has changed since the previous year and it will change over the coming years. House builders were asked to mark buyer demand from 0 to 5, with 5 being very high buyer demand. The scores are then averaged to create a final figure of overall sentiment.

Buyer demand has weakened again from last year to the lowest level ever recorded in this survey and for the first time it has dipped below an average of two. The current dip in perceived buyer demand

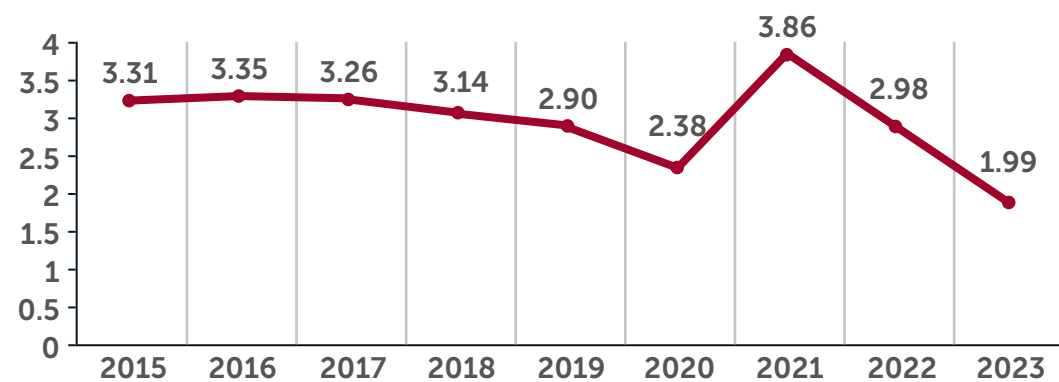
surpasses the previous lowest point which was recorded during the Covid Pandemic in 2020. There has been a continuous decline in buyer demand since 2021, when it reached its highest reported figure.

Looking ahead, it would appear that buyer demand is predicted to return to a higher level than that currently recorded (see graph 4). Although the perceived recovery in buyer demand would fall below the average figures seen prior to 2019. The predicted recovery is a cautious one but would suggest that the market will recover, and

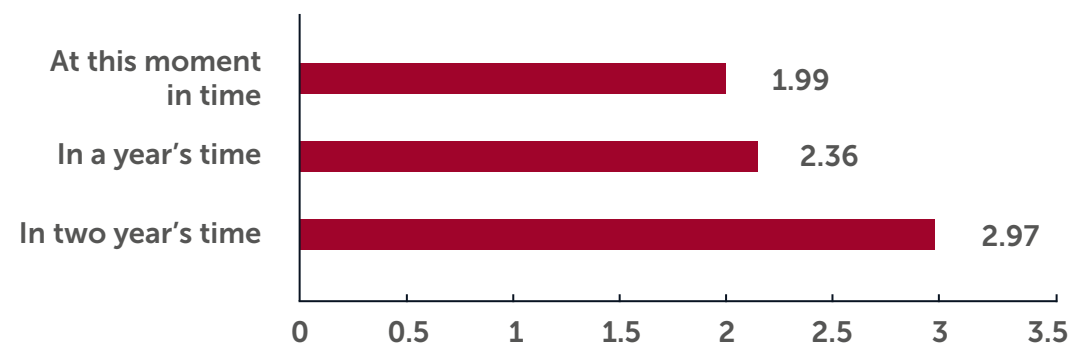
an increased number of consumers would have the confidence to buy.

Buyer demand for smaller house builders does tend to result in lower delivery, owing to the nature of the business, that being contractors who are cash flow reliant require a quick sale. Wider trackers of the market, including the FMB's quarterly State of Trade Survey, have shown that housing delivery will drop in 2023 possibly resulting in record low levels of new housing.

Graph 3: Q. How would you assess/predict buyer demand in the housing market (out of 5, where 0 reflects very low demand and 5 reflects very high demand)?



Graph 4: Q. How would you assess/predict buyer demand in the housing market (out of 5, where 0 reflects very low demand and 5 reflects very high demand)?



The planning application process

We know planning is a major issue across the industry with the Competition Markets Authority (CMA) reporting in their 'Housebuilding market study' update in August 2023 that outline planning permission was on average taking over a year. The planning system is the biggest issue facing the sector, with 55% of small house builders reporting it as the most significant barrier stopping them from delivering homes, slightly reduced from 60% in 2022. Although with additional areas added to the barriers list,

such as nutrient neutrality and specifically land viability, this may reflect a diluting of the category, it does mean it better reflects the nuances of the overall process.

House builders were asked to rank issues in the planning system from 0 to 5, with 5 being extremely important and 0 being completely unimportant. The biggest reported concern in the planning system is inadequate resourcing of planning departments, which had an average rating of 4.06 (see table 1). This continues as the worst reported issue from last year. It has been the most important factor affecting planning since 2018, with one exception in 2021, when it was surpassed by inadequate communication by planning officers.

Cost and complexity in the planning process

When looking at additional requirements and costs in the planning process, the most important factor affecting small house builders is the costs associated with delays in the system (see table 2). This closely followed by complexity which leads to the need to employ consultants, and perceived excessive information requirements. All of these issues are averaged above 4, meaning they are significant factors in causing increased costs. Fees for pre-application discussions remain a similar level to previous years



"Bring back personal contact with planning officers and make them more accessible to applicants/agents. This will save huge amounts of time and money."

FMB member





Improving the planning process

Respondents were invited to comment on what one suggestion they would have to improve the planning system. There was a broad consensus to speed up the system and simplify the overall process, with many citing 'red tape' as a barrier to getting homes built. There was also agreement across respondents that communication and clarity from local authority planning teams must be improved, with most acknowledging that planning teams needed to be better resourced. Another thread running throughout the comments was a request to standardise decision making across planning departments, which would simplify the development process.

Certainty in the planning process

There has been little change in certainty in the planning system, however there are slightly fewer with a very low degree of certainty in the system compared to 2022 (11% in 2023 compared to 19% in 2022). There have been moderate changes in quite low and medium certainty in planning outcomes, with quite low increasing by 4% on last year and medium increasing by 5%. Those reporting quite a high degree of certainty is up by 2% and very high remains the same as reported in 2022.

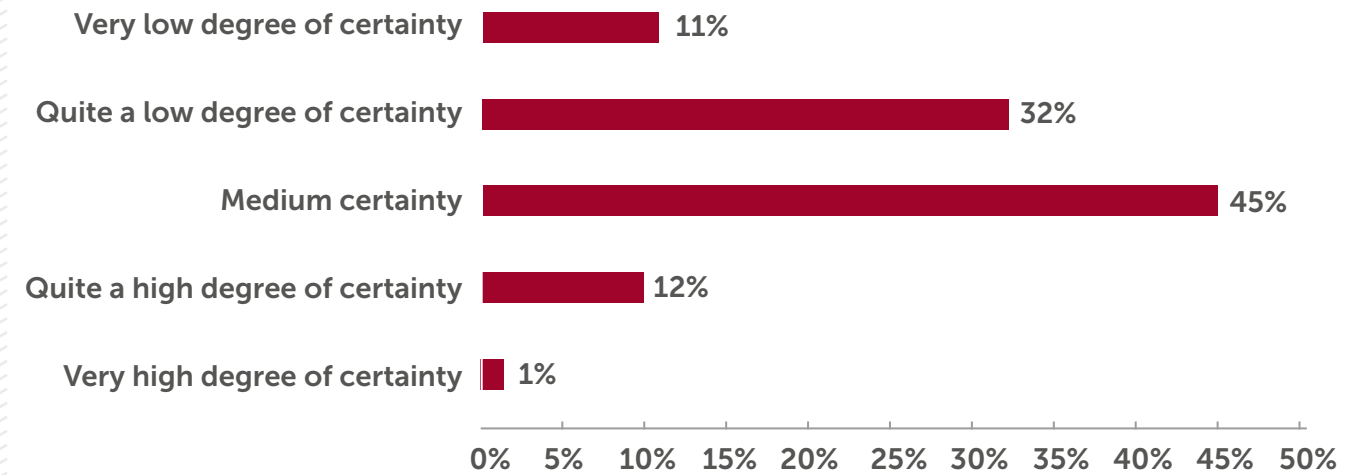
Table 1: Q. How important would you rate the following as causes of delay in the planning process? Score from 0 to 5, where 0 is completely unimportant and 5 is extremely important

Causes of delay	2023	2022	2021	2020	2019	2018
Inadequate communication by planning officers	3.83	3.85	4.1	3.79	3.99	3.58
Inadequate resourcing of planning departments	4.06	4.18	3.93	3.8	4.03	3.89
The signing off of planning conditions	3.48	3.52	3.69	3.29	3.63	3.47
Signing off of Section 106 agreements	3.17	3.05	3.51	3.09	3.58	3.37
Delays caused by statutory consultees	3.39	3.62	3.49	3.38	3.71	3.24
Negotiating Section 106 agreements	3.14	3.05	3.47	3.24	3.44	3.47

Table 2: Q. How important would you rate the following as causes of additional cost in the planning process? Score from 0 to 5, where 0 is completely unimportant and 5 is extremely important.

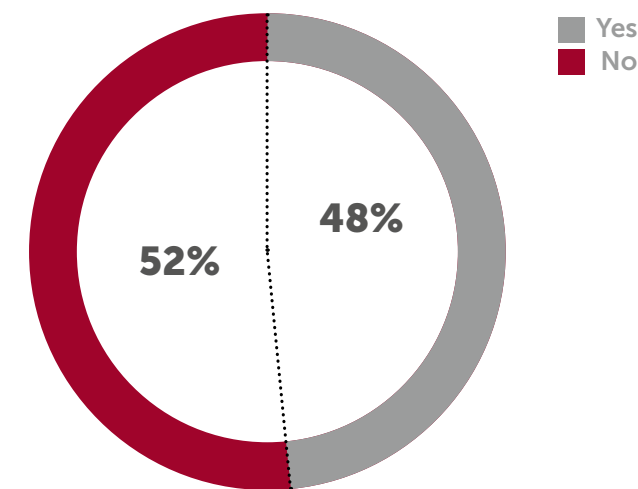
Causes of additional cost	2023	2022	2021	2020	2019	2018
Overall complexity and the cost of consultants required to deal with this	4.04	4.1	4.08	3.77	4.02	4.01
Excessive information requirements	4.01	4.16	3.96	3.74	4.19	4.2
Costs imposed by delays in the system	4.08	4.01	3.94	3.73	3.95	4.17
Fees for pre-application discussions	3.47	3.54	3.54	3.23	3.59	3.64

Graph 5: Q. On average, how much certainty do you feel about the outcomes of planning applications?



Section 106 and CIL

Graph 6: Q. Are there sites which you would otherwise be interested in, but which you believe would be unviable due to likely Section 106, CIL or other similar obligations?



"Section 106 made up differently by each council, needs to be a national standard and include biodiversity, not just keep adding more and more on so you agree just to get your planning approved because you've waited so long in the first place."

FMB member

48% of respondents reported that there are sites that they are interested in, but which are unviable due to Section 106, Community Infrastructure Levy (CIL) or other developer obligations (see graph 6). This is an increase from 41% in 2022. Given the overall issues reported with the planning system and additional complexity and cost, these figures are unsurprising.

"I currently have planning permission for a fantastic property which is unviable due to the CIL payment."

FMB member



Small sites and land availability

In this survey, there is a slight variation on the usually highly reported main barrier of 'lack of available and viable land'. This year the question was split between viability and availability with interesting results. Lack of available land was cited as the third biggest constraint on housing delivery (48%), with viability of land as the sixth most significant issue (34%).

A large number of members (63%) reported that small sites opportunities are decreasing, which is down by a fair margin on the 82% reported last year. Exacerbating the already short supply of land and the opportunities for small sites,

60% reported that obtaining planning permission for small sites is worsening.

Those reporting that small sites are being taken seriously by local authorities has slightly decreased since last year, now sitting at 22%, compared to 25% last year and down from a high of 41% in 2018. The high percentage in 2018 reporting local authorities are taking small sites seriously coincided with National Planning Policy Framework (NPPF) changes where local authorities have to promote small sites. However, those reporting that this policy had led to more small sites has remained consistently low, with only 9% reporting it has resulted

in more sites. 59% don't think the amendment to the NPPF is helping with 32% unsure as to its effectiveness.

The data doesn't paint a positive picture for the availability for MSMEs to obtain small sites particularly as they face two sets of hurdles, firstly to find the land they need and then obtaining planning permission for it. Unfortunately, it would appear where national policy has intervened to aid small sites, it isn't being implemented, which coincides with wider issues concerning housing delivery at local authority level, such as inadequate resourcing of planning departments

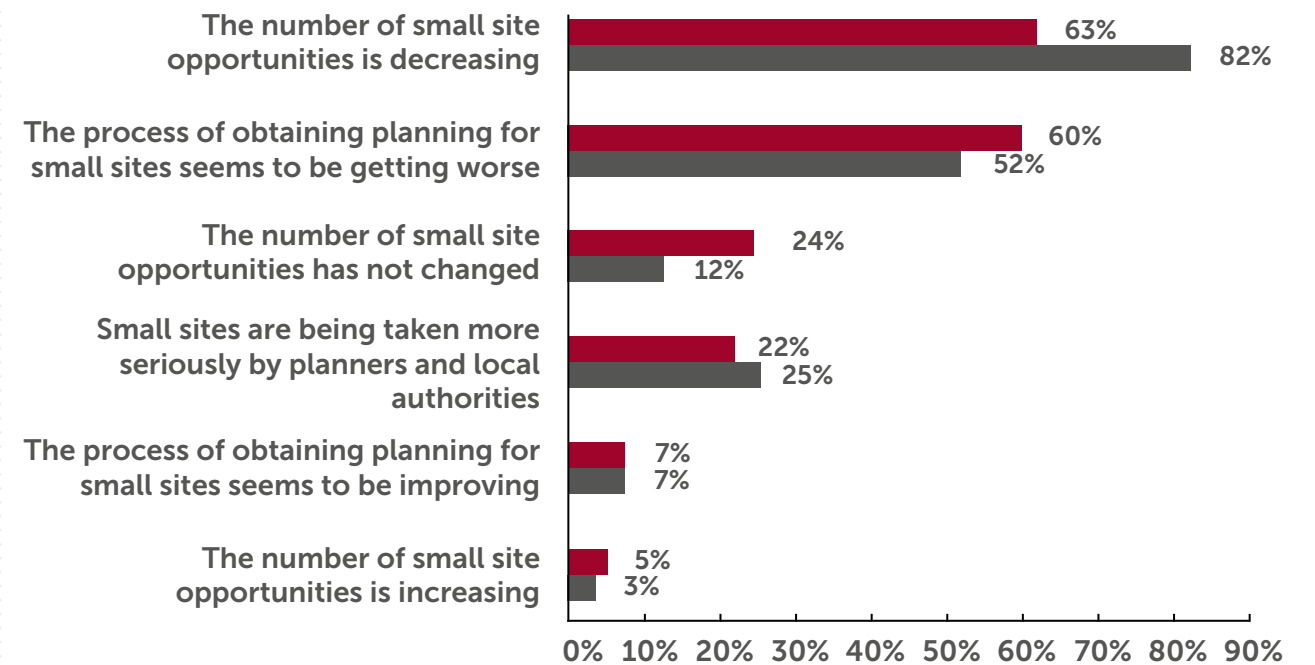


"Encourage smaller infill sites to be developed to ensure SMEs are viable as housing developers. Make the planning system a lot easier."

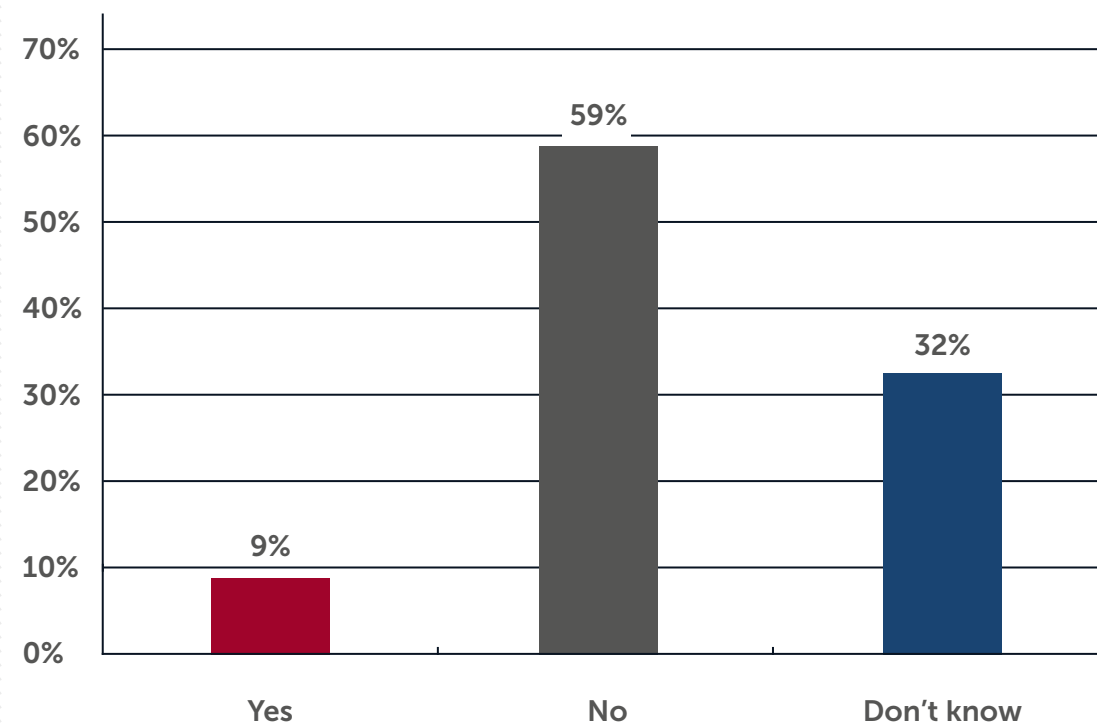
FMB member

Graph 7: Q. On the issue of the availability of opportunities for small site development, which of the following statements do you agree with (please tick all those you agree with).

■ 2023
■ 2022



Graph 8: Q. Since 2018, the NPPF has required local authorities to identify enough small sites (of one hectare or less) on which to accommodate at least 10% of their housing requirement. Is this policy driving an increase in small site opportunities for you?



Workforce and skills

Workforce shortages continue to be a barrier for small house builders, but their place as an overall barrier has declined this year to 34% compared to 47% in 2022. It has dropped from the third most significant barrier to the sixth.

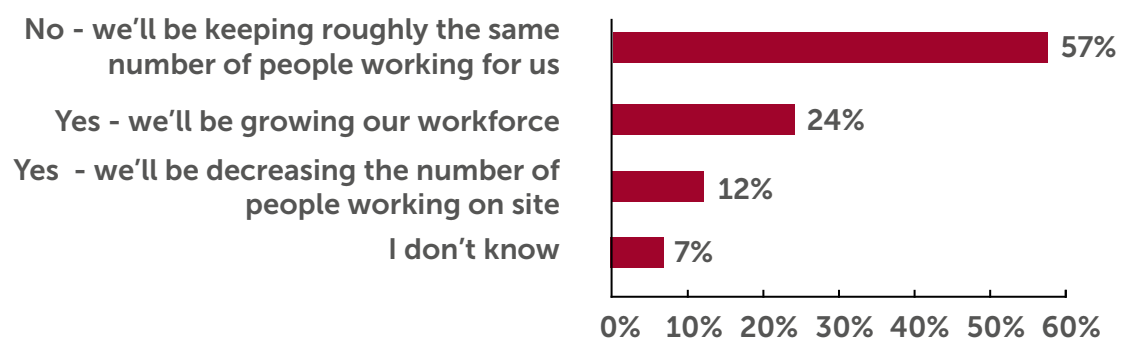
When members were asked if they plan to alter the number of people on their sites, the numbers remained relatively consistent with the previous year. The majority still report that workforce numbers will remain the same. The exception to this consistency is the increase in those reporting that they will be decreasing their workforce, which has risen from 6% to 12%, doubling in the last year.

Overall, employment and training opportunities for people entering the industry have declined compared to figures from 2022. Fewer members employed apprentices and provided onsite training for new workers (see graph 9). There was a 9% decline in those providing work experience opportunities.

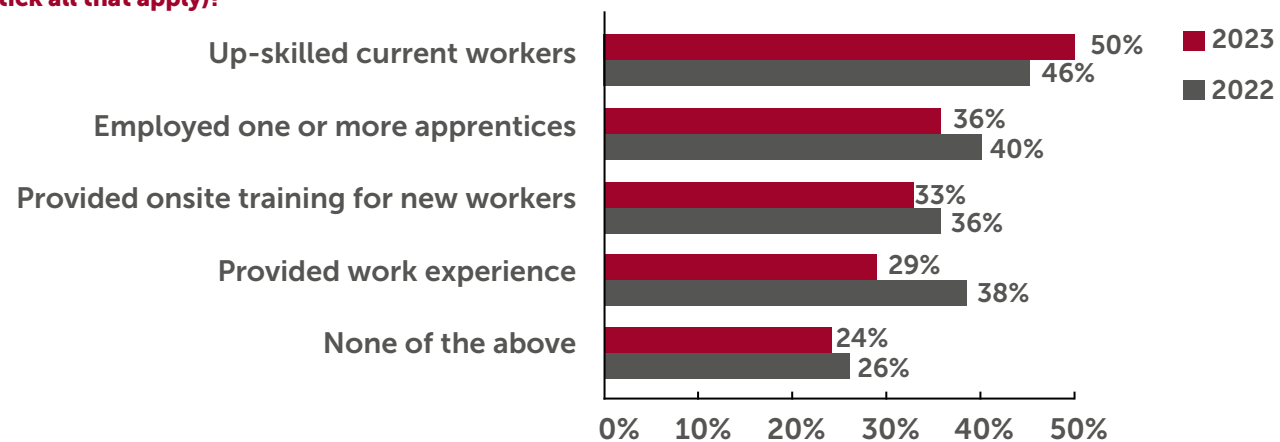
It is positive to see that 50% of house builders responding to this survey have upskilled current staff (see graph 9), which is a slight increase on the previous year, where it stood at 46%. This may reflect that there is increased investment in existing teams rather than looking for new staff, as reflected in the reduced routes for new entrants (graph 10).



Graph 9: Q. Do you plan to alter the number of people working on your sites (whether employed or subcontracting) over the year ahead, compared to a base line of this time last year?



Graph 10: Q. In the past year (since August 2021) has your company done any of the following (tick all that apply)?



Financing and costs

This section has been improved this year with extra questions added to track increases in expenditure for house building and trying to quantify the increase. The overwhelming response to this was that sites are more expensive to build, with 94% (see graph 11) suggesting this is the case. When those that answered yes were asked to estimate how much expenditure on site has increased over the last year, the majority (53%) reported this to be around 20% higher.

Sources of finance

Self-build and/or custom contracts remain the main source of finance for over half MSME house builders (up from 50% in 2022 and 39% in 2021). This is unsurprising since the majority of members operate as contractors. There has been an increase in self-reliance this year also, with more funding coming from private equity. This is supported by anecdotal evidence provided for the survey, especially the general trend of cash flow reliance as a business model.

High street bank lending has dropped off from 2022 and has fallen to the third choice of financing for a development, down from second place last year. This tends to reflect lending conditions, which are worse than in previous years (see table 3). There has also been a rise in reliance on finance brokers, which could be down to increased difficulty in securing financial products directly. There has also been a moderate increase of 4% in those using challenger banks compared to more traditional sources of finance.

Those using Homes England funding schemes has increased, which is positive. In previous years funding from these sources had been extremely low, however, the figures are still very low at 4%. It's clear much more needs to be done by Homes England to fully realise the potential of micro and small house builders.

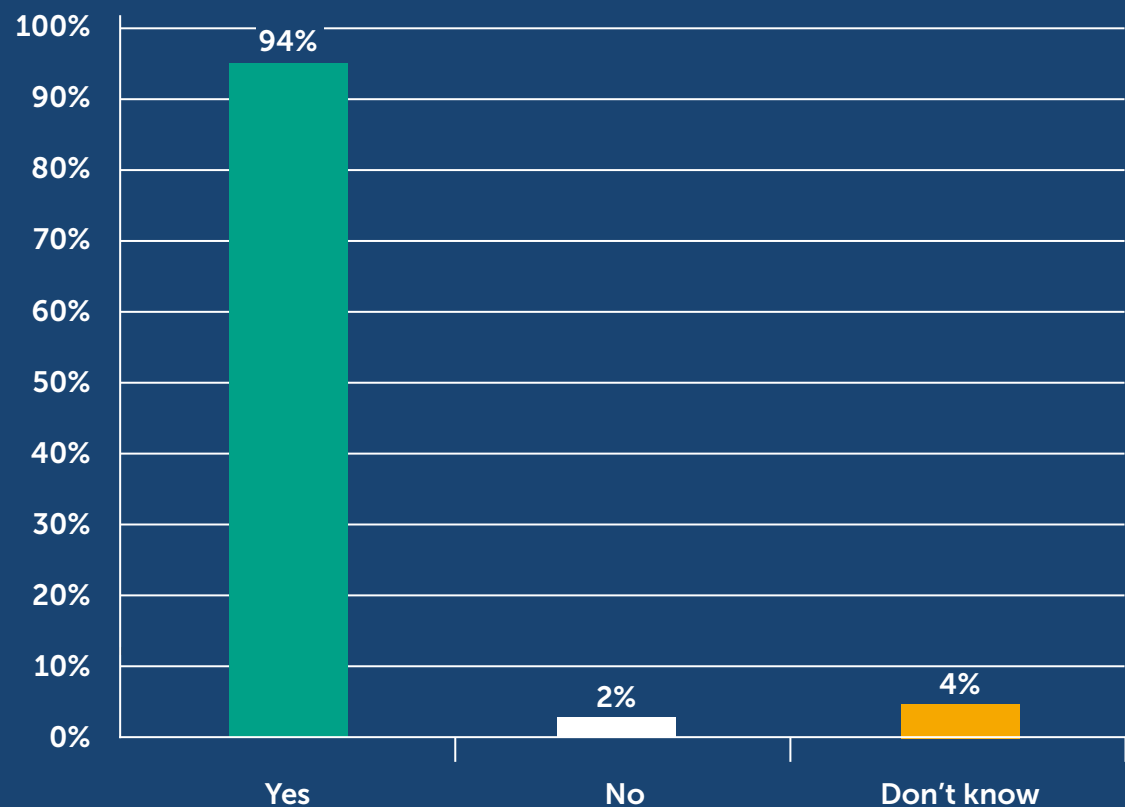
Issues with funding

Lending conditions this year are the worst reported since 2017, with the current average figure sitting at 1.84 – which is averaged out of 5 (5 being very good and 0 being very poor.) Poor lending conditions do tend to track with wider economic issues, particularly as smaller developers are often seen as a riskier proposition for financial products.

All finance related issues linked to stopping the delivery of new homes (see graph 14) have increased in 2023. Unsurprisingly, interest rates remain the biggest issue facing small house builders with poor loan to asset ratio values remaining in second spot. Limitations on overdraft facilities and fees charged on existing loans also have risen up the scale of significance in stopping the delivery of new homes.



Graph 11: Q. Has it become more expensive to build homes in the past year?



Graph 12: Q. As you answered that it has become more expensive to develop since last year, could you state approximately how much more your build costs per site have increased or are likely to increase?

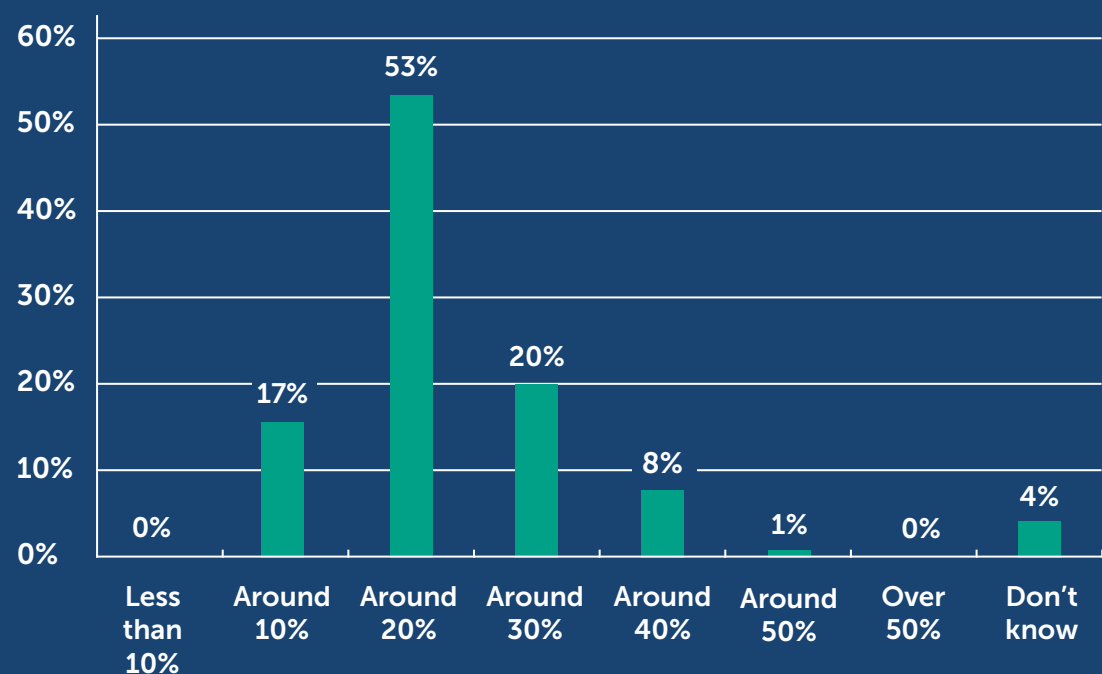
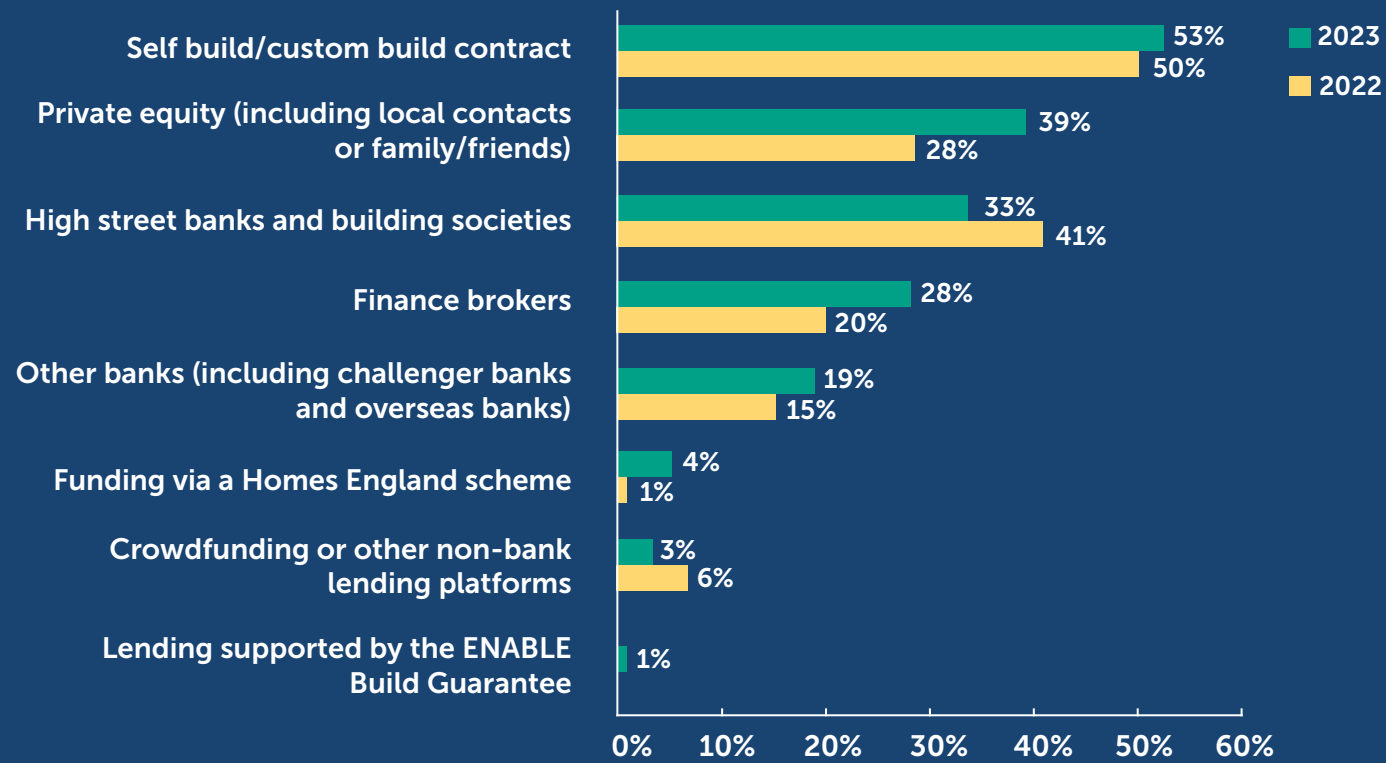


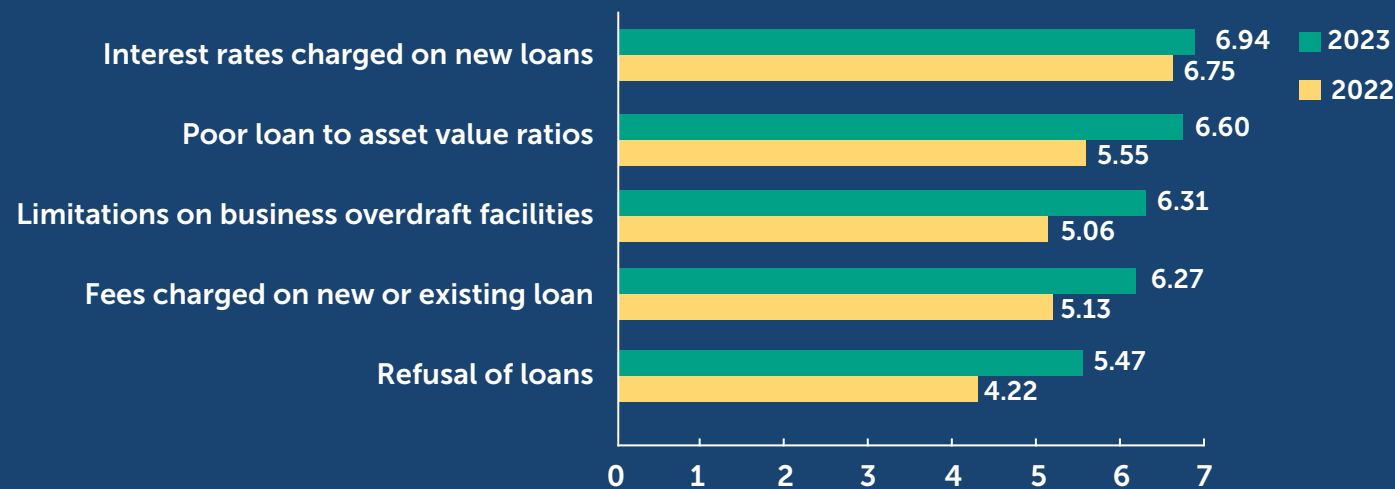
Table 3: Q. What is your experience of the current lending conditions to MSMEs for residential property development (score where 0 reflects very poor conditions and 5 reflects excellent conditions)?

	0	1	2	3	4	5	Average score
2023	12%	26%	34%	23%	2%	2%	1.84
2022	8%	14%	28%	38%	11%	1%	2.34
2021	8%	17%	27%	35%	8%	5%	2.34
2020	12%	23%	31%	25%	6%	3%	1.98
2019	10%	20%	26%	35%	9%	1%	2.15
2018	13%	24%	24%	29%	7%	3%	2.02
2017	25%	23%	20%	28%	4%	0%	1.63
2016	18%	24%	24%	26%	8%	1%	1.85
2015	23%	22%	31%	24%	1%	0%	1.59
2014	36%	22%	30%	9%	1%	1%	1.20
2013	41%	30%	22%	7%	0%	0%	0.95

Graph 13: Q. Which of the following ways do you tend to acquire funding for development (tick all that apply)?



Graph 14: Q. How significant are the following finance-related issues in restricting your ability to increase your house building activity (out of 10, with 0 being not significant at all and 10 being extremely significant)?



“We often build entire developments before the main utility providers have even got their services in. I’m sure any developer will say the utilities are the thorn in our sides.”
FMB member

Connectivity

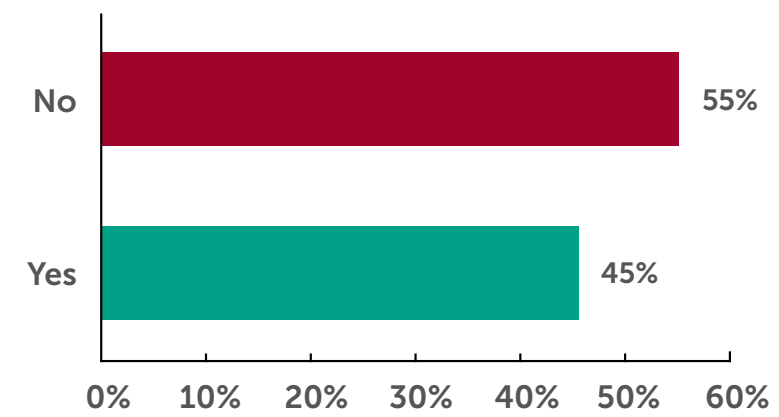
For some time, we had heard many issues regarding house building sites connecting to the electrical grid in a reasonable time scale and so as of 2022, this is tracked in the survey. This year we have seen a moderate improvement in delays with 55% (see graph 15) seeing no delays when connecting to the grid, this is up from 49% in 2022.

There has been a noticeable improvement in those saying that they need to upgrade the grid for increased capacity, with 34% needing to do this compared to 49% last year. We will continue to monitor this issue, especially

as electrical equipment like EV chargers and electric heating systems will increasingly become more prevalent and could result in more grid reinforcement.

It is vital that the capabilities of the electrical grid are looked at when considering the landscape around retrofitting of homes and the Future Homes Standard. Electrical industry stakeholders and the Government should look to ensure that sufficient work is being done to enable the grid to cope with more electrical products.

Graph 15: Q. Have you experienced delays when attempting to connect your site to the electrical grid?

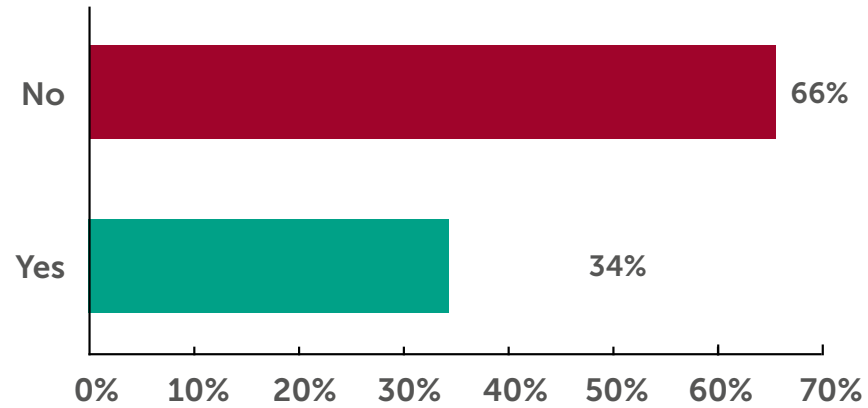


Full Fibre Broadband

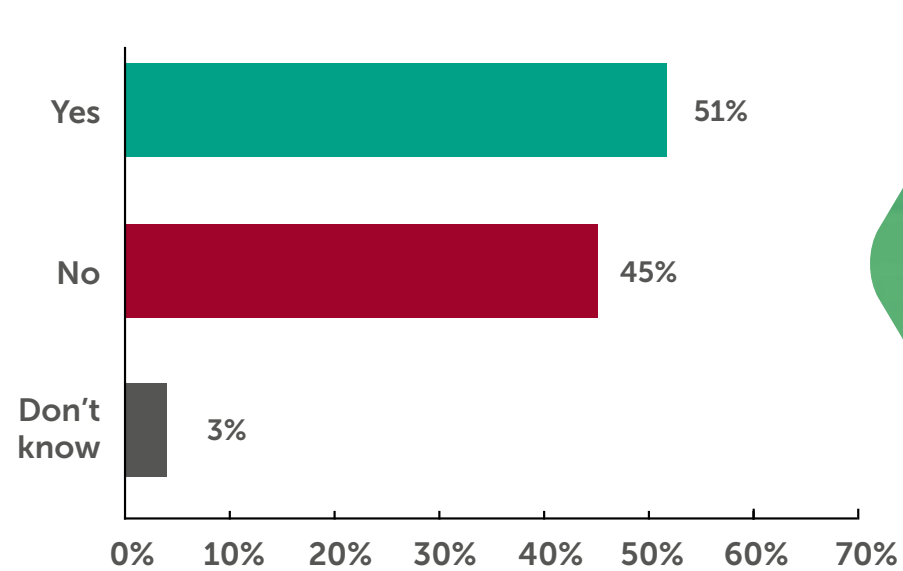
Connecting homes to full fibre broadband is an important part of delivering developments fit for the future. House builders were asked if they work with Openreach to provide telecoms and network infrastructure to their new build sites. Over half of FMB house builders indicated they did so.

When asked to clarify what type of connection they provide 67% said fibre, with 17% saying copper. As those answering this survey may have built houses up to ten-years ago, it could be that those answering copper did so some time ago and prior to it being mandatory to have gigabit capable connections. It is positive to see commitment from builders to ensuring new sites are supplying consumers with high-speed internet, especially as homeowners are increasing the number of products they have reliant on connectivity.

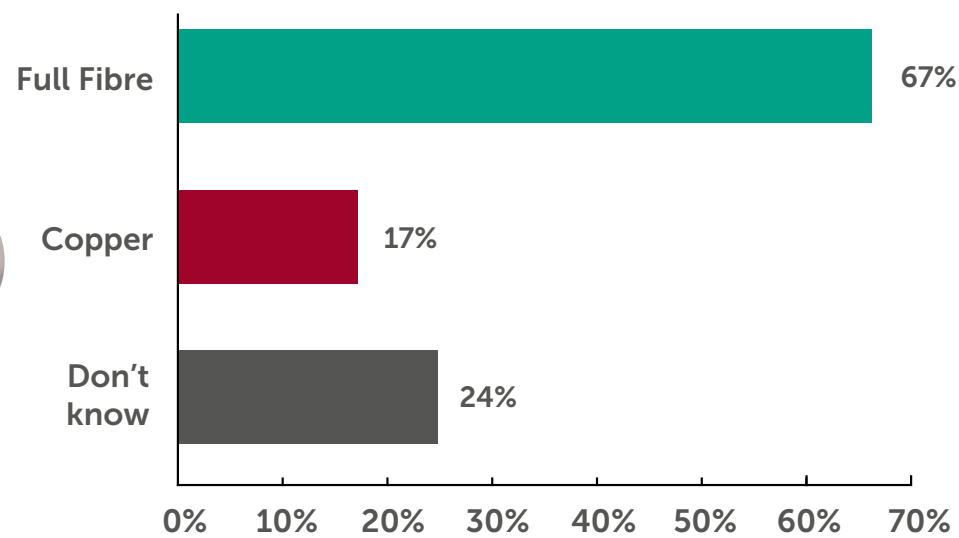
Graph 16: Q. Have you needed to request that the electrical network is reinforced to cope with increased energy demand from new products? e.g EV chargers, heat pumps etc



Graph 17: Q. Do you work with Openreach to provide telecoms and network infrastructure to your new build sites?



Graph 18: Q. Do you install Openreach Full Fibre or older Copper network?



The future of housebuilding

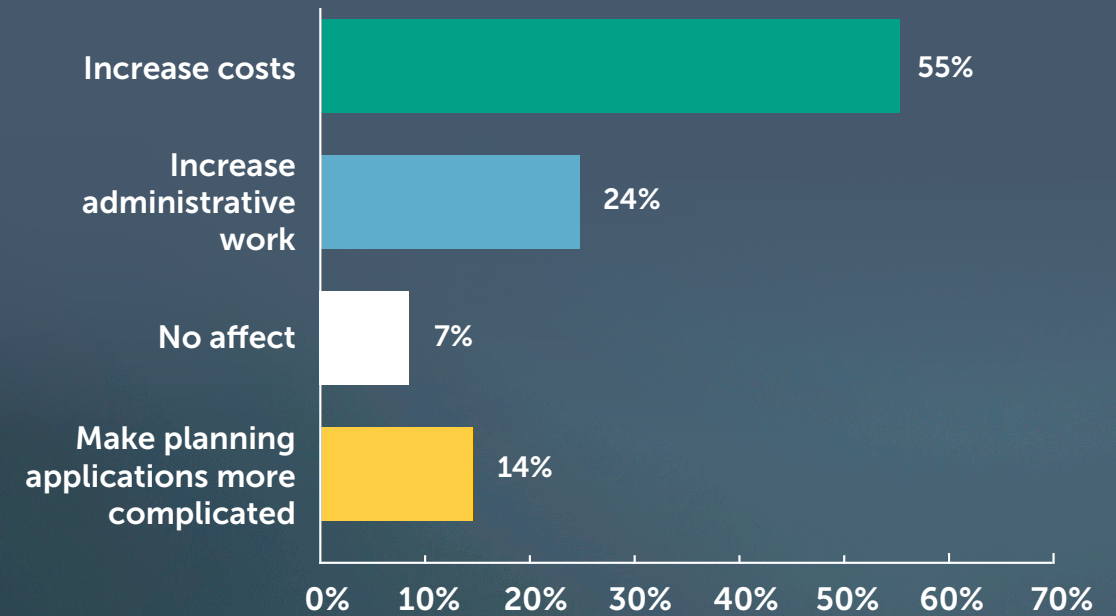
The Future Homes Standard is a set of new regulations that will impact the housing industry and is currently set to be introduced in 2025. The aim of these rules is to significantly reduce carbon emissions from new housing. When asked if members were aware of the Future Homes Standard, the majority were (68%),

but worryingly just less than a third were not (30%), with only 2% indicating they did not know.

When those that were aware were asked what impact this would have on their business, over half (55%) suggested this would increase the cost to deliver homes, with just under a quarter concerned it would

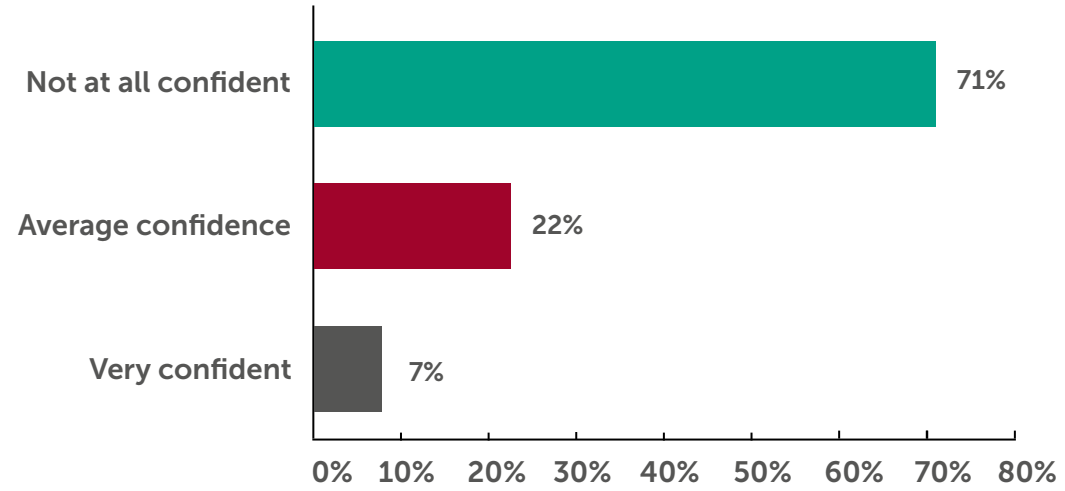
increase administrative work. 14% felt it may make planning applications harder. Conversations with the industry would support these figures, with some concerns being raised about project viability, but with support for the principle of the Future Homes Standard.

Graph 19: Q. What impact do you think Future Homes Standard will this have on your business (those that were aware of the Future Homes Standard)?



The Future Homes Standard is a set of new regulations that will impact the housing industry and is currently set to be introduced in 2025.

Graph 20: Q. Are you confident that you know and understand the requirements for Biodiversity Net Gain regulations which come into force for small sites in April 2024?



Biodiversity Net Gain (BNG)

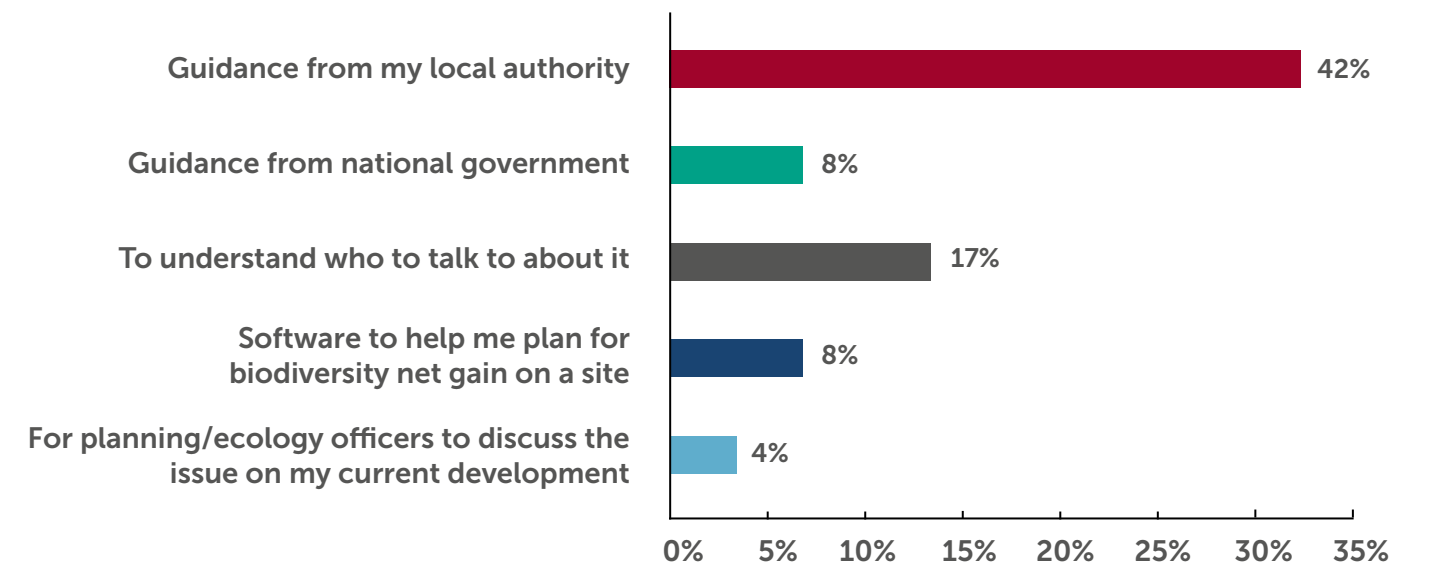
Under the Environment Act 2021 developments in England, except for small sites, will have to deliver at least 10% Biodiversity Net Gain (BNG) from January 2024. For small sites BNG will come into force in April 2024. Smaller sites are defined as having up to nine dwellings on a site that is less than one hectare, or if the number of dwellings isn't known, up to 0.5 hectares.

We have been following the progress of BNG implementation for some time and there was a full summary in 2021. Members are reporting that they are not confident with BNG, which is concerning given the impending deadlines when this will become mandatory. However, members were asked what would help them with BNG, 30% noted that

they need to understand who to talk to, with just under a quarter requesting guidance from the Government. Slightly fewer (16%) wanted guidance from local authorities, with 11% wanting help with their current site from an ecologist. Members were also interested in software to help them plan for BNG implementation (19%).



Graph 21: Q. If you aren't confident in Biodiversity Net Gain, what help do you need?





About the Federation of Master Builders

The Federation of Master Builders (FMB) is the largest trade association in the UK construction industry representing nearly 7,000 companies in England, Scotland, Wales and Northern Ireland.

Established in 1941 to protect the interests of micro, small and medium sized (MSME) construction firms, the FMB is independent and non-profit making, lobbying for members' interests at both the national and local level. The FMB is a source of knowledge, professional advice and support for its members, providing a range of modern and relevant business building services to help them succeed. The FMB is committed to raising quality in the construction industry and offers a free service to consumers called 'Find a Builder'.

For further information about the FMB, visit www.fmb.org.uk or follow us on Twitter [@fmbuilders](https://twitter.com/fmbuilders). For further information about the FMB House Builders' Survey 2021, email publicaffairs@fmb.org.uk.

About Openreach

openreach

Openreach Limited, sponsors of the FMB House Builders' Survey 2023, runs the UK's digital network.

We're the people who connect homes, schools, hospitals, libraries, businesses - large and small, broadcasters and governments to the world. It's our mission to build the best possible network with the highest quality of service, and make sure that everyone in the UK can be connected. We're a wholly owned subsidiary of BT Group and our customers are the 650+ communications providers who sell phone, broadband and Ethernet services to homes and businesses.

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