Coronavirus Guidance Webinar
6th May, 2020
Agenda

- All slides and a recording of the webinar are available on the website late this afternoon
- Poll
- CBI Update
- Update on the self employment scheme
- Poll results
- Gokhan Hassan, MD of GHCS – Top 30 M&E Contractors
- COVID-19 & Engineering Services Guidance Notes 1 & 2
- Q&A

POLL

How many of the current Top 30 do you think will be replaced in the next 10 years?

- 0-1
- 2-5
- 6-10
- 11-20
- 21-30
Top 30 UK M&E Contractors
April 2020
01 Introduction
04 Top 30 UK M&E Contractors Table
05 Brief Industry Commentary
09 Accompanying Notes
The M&E contracting industry is unique and diverse and maintains its status as a key component within most construction projects. Building services design and technology has evolved considerably over the years, yet generally the principles have remained constant – the fundamentals of MEP are Comfort and Life Safety.

I have been in the M&E industry for 17 years and for the past 12 years I have founded and run a 25-strong Chartered M&E Quantity Surveying business. This has allowed me to have a varied exposure to multiple sectors as the business has represented 75 different developers, main contractors, M&E contractors, MEP consultants and specialist sub-contractors in that period.

Back in 2007 a survey was conducted to establish the Top 30 UK M&E contractors by turnover. This list was dominated by multi-disciplinary contractors who were strong in both the M&E and FM industries. I decided to conduct an up-to-date comprehensive report in to the current Top 30 UK M&E contractors and present my findings herein.
The Top 30 back in 2007 made for interesting reading.

NG Bailey led the table and internal MEP delivery contractors Balfour Kilpatrick and Skanska Rashleigh Weatherfoil were major players, particularly in London.

Some familiar faces who are still trading as major contractors also occupied the Top 30, such as;

Michael J Lonsdale, T Clarke, Imtech and Briggs & Forrester.

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<tr>
<th>RANKING</th>
<th>CONTRACTOR</th>
<th>2019</th>
<th>2018</th>
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Sector Total: 5,328,227
This table represents the Top 30 back in 2007, but it has been adjusted to reflect inflation at an average of 2.8% over the past 13 years. This gives us current day figures to make the table more relative.

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Sector Total: 7,499,511
This is my 2020 Top 30 UK M&E Contractors table by turnover.

The previous table had a significantly higher turnover between the Top 30, however, a large portion of the previous turnover was attributed to FM. The aim of the 2020 table is to incorporate contractors who predominantly work in construction and not FM.

20 newcomers have been welcomed in to the Top 30, replacing the likes of EIC, Mears, Emcor and Dalkia.

Independent contractors including Dodd Group, Michael J Lonsdale, Vital Energi, Essex Services Group, Designer Group, HE Simm and Phoenix have more than doubled their turnover in the past 13 years.

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Sector Total | 4,451,002 | 3,998,565 |
What has changed in 13 years?

Construction hasn’t got a reputation for the most progressive industry, but in the last 13 years we have seen change to indicate that we are heading in the right direction. Alex Wilmot, Director of Halsion, has pointed to the Data revolution that has changed all industries, including construction. The progression of software has been incredible especially in the world of BIM, which is having a major positive impact on the M&E sector and continues to advance year on year. Whilst there has been a data revolution, Alex also states that “The welcomed focus of wellbeing of our staff within the industry both physically and mentally has also seen an encouraging move forward in recent years. The Covid-19 pandemic will most certainly see a rise in the need to keep the momentum of positive mental health at the forefront of our industry. Many staff, operatives and/or their family members will experience considerable stress and anxiety during this unprecedented situation and as an industry we need to be aware and supportive for everyone who may be suffering.”

Perhaps in another 13 years we will look back and see this point as the moment compassion made it’s way in to construction both as business-to-staff and business-to-business.
The tables show that there has been a clear shift in multi-national publicly-owned contractors being replaced by privately-owned London-centric contractors. Nick Baish, Managing Director of Designer Group, feels that this could be because “The demands on M&E contractors have changed over the last 10 years and clients expect more agility and responsiveness that most public companies cannot meet.” A 10.2% increase in turnover from 2018 to 2019 represents steady growth, but it remains to be seen if this level of growth will be maintained in 2020.

There are a considerable amount of new entrants in the Top 30 table. The residential sector has provided a significant amount of this turnover and this can, in part, be pinned on the explosion in London of high-rise residential projects, which were almost non-existent 13 years prior. Nick Baish points out that “Back in 2007 there was a drive by most contractors to secure turnover on public sector frameworks, such as the Building Schools for Future Programme and Hospital PFI/PPP contracts.” These frameworks were previously dominated by larger contractors, but they were phased out a number of years ago.
What does the future look like?

Procurement routes have become somewhat of a pendulum over the last 15 years swinging from single stage D&B to two-stage traditional. Nick Baish agrees that “The market over the next few years will move back to a client-led approach of single stage D&B to reflect the sentiment that it will no longer be a contractors market.” This could lead to more market share being taken by contractors who have more risk appetite.

There is also an expectation that data centres, infrastructure and mid-market/PRS/affordable housing residential units will lead the way in the medium-term. All of the contractors within the current Top 30 are already strong within at least one of the aforementioned sectors, but may yet diversify over the next few years to limit exposure to any one market.

Martin McEvoy, Managing Director of Imtech, explains that “Construction is an industry where we are the first to be affected by a recession and the last to come out of one. This means that investment is generally curtailed in a recession. Offsite manufacturing, innovative products and new assembly techniques in particular have come a long way in the past 13 years, but not as far as it could have and with the current climate there will be an opportunity to modernise the industry further - companies need to be brave.”
What does the future look like (cont...)?

It is imperative to maintain a steady flow of investment within building services as we are at the forefront of decarbonising buildings in the modern age. Martin McEvoy also believes that “This will lead to many more M&E contractors evolving into energy and environmental sectors and will make the industry an exciting place to work particularly for younger people.”

The current climate will have a long-lasting impact on every industry. Within construction we will have no choice but to become more lean, think differently, work differently and Martin McEvoy has no doubt that this will lead to “Innovation not just in offsite manufacturing, but innovation in products and innovation in how we work on site.”

As for the year 2033, it’s difficult to predict exactly what the M&E industry will look like, work like, who will still be around, who will make up the Top 30. Will we see more use of robotics, will we see more software implemented to reduce the human workload? It’s irrelevant what we predict; we should be spending more time creating the future rather than allowing the perception of the future to dictate what we do in the present.
**Accompanying Notes**

This list is indicative, it is not exhaustive or definitive and is the opinion of Gokhan Hassan, who compiled the data.

The data has been compiled from a mixture of accounts provided directly by contractors and financial information available publicly.

The contractors identified are those whose core services are within the M&E construction installation sector, some of whom also offer FM services.

Contractors who are predominantly FM or Utilities are not included in the table, notably; Integral UK, Arthur McKay and SSE.
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COVID-19 & Engineering Services Guidance Note 1

PPE (including RPE) requirements for work in ‘specific environments’
Template indicating PPE requirements when working in ‘specific environments’ with elevated risk of coronavirus (Covid-19) spread

- Work in specific environments
- Planning & Risk Assessment
- Personal Protective Equipment
- Site Requirements to wear RPE
- PPE Operational Control
- Dealing with waste PPE
- Awareness, training and Competence
- Performance Monitoring
- Close proximity working
- Legislation and guidance (further reference)

https://www.thebesa.com/covid19/besa-covid19-guidance/
Working in close proximity
Template indicating measures that enable essential work to be carried out closer than the PHE social distancing (2 metre) guidelines

- Eliminate close working where possible
- Where closer proximity working is necessary and unavoidable
  - Reduce
  - Isolate
  - Control
  - PPE & RPE
- Key sources of official information and advice

https://www.thebesa.com/covid19/besa-covid19-guidance/
Thank you

www.thebesa.com/covid19

covid19@thebesa.com
State of Trade Survey – closes tomorrow
Webinar Programme

**Tomorrow 7th May**

Dame Judith Hackitt

**Next Week:**

Monday: Martin Taylor from LABC
Tuesday: Technical Q&A
Wednesday: Contractual Q&A
Thursday: TBC
Friday: Joanna Goddard from BRIM on Cyber crime
Thursday 7th May, 10am

Dr Chris Owen, Manager, Customer Technical Services at Tata Steel Tubes.

Reducing risk when specifying building and industrial services pipework.

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