9.1 Wales

9.1.1 Aims

This questionnaire was send to the Construction Excellence in Wales’s data base in order to find out which was their opinion about the CE programme and the current running of the construction industry in general. For this reason, we do not have to forget that these are the responses of people involved in some way with the CE; consequently, the respondents might have been more optimistic with the benefits of this initiative than the average of the industry.

The questionnaire wanted to find out the following four issues:

- 1. Awareness of the Construction Excellence programme, feelings about its current and its future success and the commitment to the programme.
- 2. Valuation of the main problems of the UK construction industry.
- 3. Valuation of the main initiatives such as partnering, benchmarking and “investor in people”.
- 4. Problems that may make difficult a better working of the programme.

9.1.2 Results

The questionnaire was sent at the beginnings of December 2004 to 1500 members of the Construction Excellence in Wales club, and most of the responses arrived within two weeks. There were 66 responses, the respondents classified themselves as contractors (small, medium or large), clients, consultants, subcontractors or others, nevertheless, there were some respondents that did not classified themselves.

The number of responses according to their role:

- 16 Contractors (most of them medium or large contractors)
- 12 Clients
- 21 Consultants
- 3 Subcontractors or suppliers
- 11 Others
- 3 Undefined

66 Totals

9.1.3 Analysis of the results by question number

Question 1: I am aware of the CE’s initiatives

The purpose of this question was to check, if people involved with the programme feel that the effort made by the CE in terms of spreading the principles of the
Rethinking Construction was enough. The questionnaire shows that most of the people were completely aware about the initiative, only 3 respondents were not sure about what was the CE. The effort made by the CE (conferences, workshops, guidelines…) in order to make aware the Rethinking Construction spirit, seems to have succeeded.

Some respondents point out the big effort made especially at the local level by saying: “CE is working much better at the local level”, “CE has provided the support and impetus to spread the gospel of construction partnering throughout Wales. From my experience they appear to be better organised at the local level rather than at the national level, where they are particularly unimpressive”.

The questionnaire evidences that clients feel to be slightly less aware about the initiatives than the rest of the groups, but our opinion is that this response reflects more the distrust of clients, rather than their lack of awareness. In fact, clients seem to be the least believers. One of the respondents explained his fears if clients do not become soon the core of the process by saying: “Clients are the ones that tend to decide the procurement route, for this reason, it would be advisable to give them more education in partnering and other CE’s initiatives”.

9.1.3.1 Question number 1. Awareness

**Question 2:** I feel that CE’s initiatives are changing construction performance

The objective of this question was to know whether the respondents believe that these initiatives are changing the construction performance. The questionnaire shows us that there are a lot of “believers”, but there are still some people that demand more evidence of the changing.
Question 3: I feel that CE’s initiatives are going to change the construction performance.

Question three was designed in order to find out whether the respondents felt that the initiatives could change the construction performance in a future. The results of this question, in comparison with the previous one, shows us that most of the people that have not seen evidences of the change yet, are sure that these initiatives will bring a change in the construction performance in the forthcoming future.

In both, two and three questions, there is no much difference in the different groups’ responses.

A large contractor expresses one of the most shared desires of the industry in the following comment: “Perhaps the day will come when we do it ourselves rather than rely on others”.
9.1.3.3 Question number 3. Future success

Question 4: My company and/or I am committed to the CE’s initiatives

The purpose of this question was to know if the respondents feel that they are committed to the initiatives. The results show us only a few respondents not sure about their commitment, but most of them feel themselves completely committed, especially the contractor group.

9.1.3.4 Question number 4. Commitment
Question 5: Problems in the UK’s construction performance

This section was designed to look at the construction problematic situation and tries to check how the different parties involved in the construction industry see the problems that are affecting the industry performance.

The respondents see the adversarial relationships inside the construction industry and the skill shortage as the main problems. On the other hand, inflexible regulations and the poor use of management tools are seem to be the least important ones.

**Fragmentation**

Fragmentation was seen as a major problem by clients and contractors, while a large number of consultants did not see it as a main problem.

Clients understand the problem of fragmentation, because they are affected by fragmentation, in the way that their requirements get lost all along the subcontracting of the supply chain. Contractors are also affected by fragmentation, because they have to deal with too many companies involved in the supply chain, who are looking for its own benefit, for the requirements of its own client and who often do not want to understand the other points of view. Finally, consultants should realize the problems that arise because of fragmentation, especially when they struggle with the segregation that exists between design and construction.

Our opinion to this nonsense is that consultants might fear that without the segregation between design and construction they will lose their independence from contractors and become a simply subcontracted activity.

9.1.3.5.1 Question number 5.1. Fragmentation
Adversarial attitude

It is important to point out that all the groups agree that one of the main problems that affect the construction performance is the adversarial relationship that exists between the parties involved.

9.1.3.5.2 Question number 5.2. Adversarial attitudes

Poor use of standardization and pre-assembly

There are a big number of respondents, especially consultants who either do not agree that there exists a poor use of standardization or pre-assembly, or who do not think that the use of these construction methods can bring about an improvement to the industry

May be contractors and clients, as they have to deal more with the construction costs, see that the use of standardization and pre-assembly can bring big savings in cost and time.

On the other side, consultants might feel that their job as designers has not only to do with costs, but also with other issues like appearance, functionality amongst other issues.
9.1.3.5.3 Question number 5.3. Poor use of standardization and pre-assembly

Poor use of management tools

Respondents see the poor use of management tools as a problem, but not as a main one. A consultant expressed an interesting comment about the poor use of management tools by saying: “poor use of management tools is especially relevant to the smaller companies and I feel that this is a major area in which CE could have an effect”.

9.1.3.5.4 Question number 5.4. Poor use of management tools
Inflexible regulations

The differences in opinion between all the groups are quite significant. While clients and especially contractors, really feel this problem as one of the most important ones, consultants feel this problem as a minor one. The bellowed graph again evidences the fragmentation of the industry, because the parties do not understand the whole process and the problems that occur in other activities are considered by the other parties. Consultants might not understand the costs that arise because of duplicating process, regulatory regimes and so on.

Nevertheless, in health and safety issues some people ask for less flexible regulations. One consultant from the CDM Support Group (a Health & Safety related organization) commented about the flexibility regulations: “Our members would prefer clear rules in regulation rather than flexible risk assessment that they find difficult to carry out”.

![Chart](chart.png)

Skill shortage

Most of the respondents feel that this is one of the main problems affecting the construction performance. About this issue a consultant made a worthy comment about the necessity of a better scheme of degrees by saying: “The government through groups such as CE should be encouraged to drop the idea of having the majority of the population with degrees and formal qualifications. Instead trade schools should be developed for non academics which improve practical skills”.

9.1.3.5.5 Question number 5.5. Inflexible regulations

80
Question 6: Valuation of partnering experience

Questions 6, 7, 8, 9 and 10 examined what the different modal groups thought about the benefits of the main initiatives of the CE such as partnering, benchmarking, respect for people and the demonstration projects.

The questionnaire studied the partnering experience on the basis of quality, cost, time and personal satisfaction. Respondents express a high enthusiasm in the benefits of partnering, principally, in quality and personal satisfaction; while the reduction in costs and time, though they have still a very good valuation, do not have the same enthusiasm. These results are consistent with the KPI results of the previous year, where we could observe that quality and personal satisfaction are partners more appreciated benefits, in their partnering experience.

In an appointment with a public client, the client was asked about the success in reducing cost and time using a partnering arrangement. He expressed that a reduction in time was easier to be achieved, because partnering permits a better planning and management of the process. His costs reductions were about 5%, (most of them coming from the use of prefabricated and standardized products) but not as good as those suggested by Sir Egan. However, he added that the partnering have brought about a lot of benefits, difficult to bevaluated in terms of money, such as sustainability, training, environmental issues or benefits to the community.

The respondents made a lot of comments about this initiative. A large contractor pleased with the partnering experience expressed: “The value in partnership is to have long term relationships with clients that allow development of trust and good systems”. Some contractors pointed out that although partnering was a
good approach to change the industry, it was not the only one. A contractor expressed about that: “The industry needs to understand that there are other ways to change the industry and have to find which one works better for them. If we all adopt the same approach we will miss opportunities in other areas”. One consultant also expressed this view by saying: “Partnering is valuable because it attempts to clearly illustrate and measure the benefits of collaborative working arrangements and tries to encourage companies to demonstrate an assessed level of commitment to their staff, but is not more than another procurement method which is suitable for particular types of work”.

In conclusion, the industry sees that sometimes partnering is presented as almost a panacea and would like to remind the CE that there others approaches that should be promoted too. Moreover, the CE is sometimes perceived as being primarily concerned with promoting partnering, when actually it is promoting more activities than just this collaborative working arrangement.

It is interesting to point out that contractors are the party that is more satisfied with the partnering experience. A possible explanation, which could explain why contractors are so interested in using this new collaborative arrangement, could be that partnering permits them to control better the risk. Partnering together with a proper risk management permits to share fairly the risks and also allows to work together in order to sort out problems that might occur at the construction site. Therefore, partnering offers them more certainty, more control and more reliable profits. In addition, some partnering contracts have even a percentage of profit guaranteed which reduce even more contactors’ risks. This percentage of profit guaranteed is set up with the intention of in motivating the different parties.

<table>
<thead>
<tr>
<th>Valuation</th>
<th>Number of responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly Agree</td>
<td>10</td>
</tr>
<tr>
<td>Agree</td>
<td>15</td>
</tr>
<tr>
<td>Neither agree nor disagrees</td>
<td>20</td>
</tr>
<tr>
<td>Disagree</td>
<td>5</td>
</tr>
<tr>
<td>Strongly disagree</td>
<td>5</td>
</tr>
</tbody>
</table>

6.1 Partnering - quality

9.1.3.6 .1 Question number 6. 1 Partnering-quality
9.1.3.6.2 Question number 6.2 Partnering-cost

9.1.3.6.3 Question number 6.3. Partnering-time
9.1.3.6.4 Question number 6.3. Partnering-personal satisfaction

Question 7: Valuation of benchmarking

Most of respondents see it as a good way to find weakness and strengths and therefore, a good way to improve industry performance. Although it has a good response by all the parties, we expected even a better one. May be the industry either needs a better explanation of the huge benefits that this tool can bring about, or needs more data to be compared against, or simply demands both needs to be satisfied in order to improve their opinion about this initiative. In addition, some respondents may feel that benchmarking compares different projects or projects in different locations, and as a result, the comparisons are a bit fuzzy.

The new *Benchmarking Club in Wales* might give more useful data and more evidences of these benefits.
9.1.3.7 Question number 7. Partnering-personal satisfaction

Question 8: Valuation of investor in People

Although there is a big majority of people that believes that this initiative can make construction sites more attractive to skilled people, the questionnaire show us that there is a big amount of respondents who disagrees.

A possible explanation to such response could be that some respondents may think that this programme has many undefined concepts, which are really difficult to be measured properly and that the fact of having lip accreditation does not mean effective communications or good training programs and vice versa. May be the Respect for People KPI are helping in some way by defining better these concepts and giving tools to measure them.
9.1.3.8 Question number 8. Investor in people

**Question 9 & 10: Valuation of the demonstration projects**

Questions 8 & 9 were designed to know whether the respondents were interested in the reading of demonstration projects and if they believe that by implementing the CE’s guidelines they could achieve similar results to the demonstration projects ones.

Most of respondents seem to learn from them and to be really interested in the successes of other colleagues. One respondent, classified as “other”, expressed an interesting comment about this by saying: “Champions to demonstrate the success of partnering, benchmarking amongst other Rethinking Construction’s initiatives are essential. Without good examples those less likely to take on such schemes will resist change due to fear of the unknown. Provide good support, in the form of funding and staffing, to the true champions who genuinely make a difference! This will have a knock on effect throughout the industry”.

It is important to notice that although most of the respondents say that are interested in reading demonstration projects, there are still a significant number of them that seem not to see the point in their reading, maybe because sometimes are vaguely explained and there is not enough information. The key points of their successes usually are missing in their reports, because companies do not want to give this information to the competence.

Question 10 presents again clients as the least believer party. On the other hand, consultants and contractors feel that by implementing CE’s guidelines they could achieve similar results to those explained in the demonstrations projects.
9. Demonstration projects interest

9.1.3.9 Question number 9. Demonstration projects

9.1.3.10 Question number 10. CE’s Guidelines

**Question 11:** Contractors are only able to contribute to improvements in the industry by cutting costs and time

This question was designed to provoke a response against the opinion of those who say that clients choose on a lowest price basis because contractors can not offer them a range of quality. The results indicate that not even the clients agree with such opinion; there is a strong disagreement from all the groups.
9.1.3.11 Question number 11. Contractors and quality

Question 12: Contractors only follow the CE’s guidelines to improve their marketing.

There is a wide spread opinion, especially coming from clients, that says that contractors follow the CE’s guidelines only with the intention of improving their marketing. The purpose of this question was to check whether the different parties agree with this opinion.

Most of the respondents disagree with this opinion, but it is important to notice that a significant number of clients agree with this opinion. Consequently, this point is identified as one of the main clients’ fears and one of the reasons of their lack of believe in the programme.
9.1.3.12 Question number 12. Contractors and quality

Question 13: Clients want partnering contracts in order to take more control of the construction process, but most of them are not qualified to lead it.

There is an opinion that says that clients wants partnering contracts so as to take more control of the construction process, but they are not qualified to lead it. Most of contractors and consultants agree with this opinion and even some clients agree with this opinion too. Consultants and contractors might think that occasional clients have not enough experience to lead the construction process, especially when they form part of the construction industry for only a concrete project.
9.1.3.13 Question number 13. Clients and partnering

**Question 14:** Partnering means a closer relationship between the contractor and the client and removes influence from the consultants.

Although we have heard sometimes this opinion, we expected a big disagreement from all the groups, because we thought that partnering has little thing to do with the loss of influence from consultants; their loss of influence has more to do with the new procurement routes as design and built and engineering management and the major capability of contractors to manage the supply chain and to reduce costs and times.

It is important to notice that not a little number of respondents indicates their agreement to this opinion. Even a few consultants give their support to this opinion. The possible explanation can be related to question number six, where we explained that with partnering contractors gain in certainty and control, consequently, his power in the supply chain is considerably enhanced.

Actually, even in partnering or other collaborative arrangements, the party with more resources takes the lead, for that reason, some consultants might think that partnering is another step more in their loss of influence on the client and also on their independence from contractors.
Question 15: Partnering is not going to work with small contractors, subcontractors and suppliers because it is too risky for them.

Some people think that partnering is not going to work with small companies, because it is very risky for them. The small companies have been surviving, by using a flexible business management approach. They have been trying to deliver products to a lot of clients, the more the better, or being part of the subcontracted supply chain of larger companies. This approach has permitted them to work even when the workload has reduced because of economical cycles valleys.

So it was very surprising that respondents disagree so strongly to this opinion. A public client expressed an interesting opinion about the feasibility of partnering with small companies by saying: “Partnering works well when the job that one partner wants to subcontract represents a good turnover to the subcontractor partner, as a result, the subcontractor is interested in delivering a good product; however the turnover should not represent too much for the subcontractor, otherwise it could be too important for the subcontractor and too risky for both of them”. A contractor also pointed out the change of culture as the main important issue in order to succeed with partnering arrangements by saying: “Effective partnering has nothing to do with size; it has with commitment, honesty and capability”.

On the other hand, with the new procurement systems large contractors have more power over the supply and sometimes, especially if the tender has been low, they abuse in the use of subcontracting with the intention of achieving their small profit margins. Consequently, partnering can be a useful tool for small
suppliers or subcontractors so as to balance the power and share their risk with other partners.

9.1.3.15 Question number 15. Partnering & small companies

Question 16: To avoid fragmentation of the construction team, one approach is to allow larger contractors to take the lead.

Questions 16 & 17 were designed with the objective of finding out whether respondents think that large contractors can manage the supply chain and avoid fragmentation and if the respondents think that fragmentation will occur even so, because of the widespread use of subcontracting all along the supply chain.

The responses at question number 16 show us a wide range of responses, even inside the different parties; the results are not very conclusive as a result. We just must point out that those who presented themselves as large contractors are mostly the contractors who agree with what is proposed at question number 16.
9.1.3.16 Question number 16. Large contractors: the solution to fragmentation

Question 17: When large contractors take the lead, fragmentation of the team occurs because of the widespread use of subcontractors.

There is also a wide range of responses at this question; nevertheless, the disagreement now is it slightly more clear.

It’s important to highlight that some of the contractors who said in question 5.1 that fragmentation was one of the main problems; do not see now the widespread use of subcontracting, as a possible cause of the fragmentation. It seems that contractors feel that fragmentation occurs mainly because of the segregation between the design and the fragmentation.

It is important to point out that fragmentation is even more problematical when a small or medium contractor tries to embrace big projects, and tries to fill up their lack of resources with an abuse use of subcontracting.
9.1.3.17 Question number 17. Fragmentation & subcontract

Question 18: “Whole life cost” and “value for money” are undefined and subjective concepts that are not a guarantee of quality.

There is also a quite wide range of responses on that question. The opinion that “whole life costs” and “value for money” are undefined concepts is quite widespread. Actually, it is really difficult to find out the total costs of the ownership of a building and also valuate it in terms of money. Consequently, although apparently it seems quite reasonable that higher initial costs together with a good design and a proper construction would reduce the whole life costs of a building; that is quite difficult to be proved.

Some clients explains their clear view in respect of that and they argue that “whole life costs” and “value for money” are vaguely defined, especially when they have to pay extra initial costs for something that is yet to be proved.
9.1.3.18 Question number 18. Undefined whole life costs

Question 19: The prize of quality is closely related to capital costs

This question was a bit poorly worded and that might be the reason for the high range of responses. We failed in the way we asked that question, because the suitable word was value instead of quality. What we really wanted to know was if respondents believe that higher capital costs at the design and construction could bring out a better value for money during the life span of the building. Therefore, these results are not conclusive at all.

9.1.3.19 Question number 19. Capital costs-quality
Question 20: Open book contracts are easy for public agencies but are more risky in the private sector.

There exists an opinion that says that open books entails less difficulties for public agencies in comparison with the difficulties that entails in the private sector. The people that hold this opinion argue that public clients, as they must be under a constant audit have fewer problems to implement the use of open books. However, the results demonstrate that this opinion it is not shared by the people involved in CE, who do not feel as a real risk to have open books contracts.

![20. Open books risk](image)

9.1.3.20 Question number 20. Open books risk

Question 21: CE needs to concentrate more on civil engineering as there is a greater scope for improvement.

Some people say that CE is very focused in housing, but it is not enough focused in civil engineering issues, where it is thought that there exists a greater scope for improvement. Only some contractors seem to agree with this opinion, though there are others that disagree with this opinion, maybe because they are not related with this kind of activities. The other groups normally deal more with housing than with civil engineering works, what would explain their responses and particularly the high amount of people who do not wish to take an opinion.

One large contractor justifies that lack of interest in civil engineering works by saying: “We must concentrate on the building side as this is where more small companies are carrying out the works with lack of appropriates systems and skills to control safety and quality”.
Question 22: Partnership and long term relationships need consistent workloads but in the construction market this is unlikely.

One of the main fears of the partnering initiatives relies on the inconsistent workload, which do not enable long term relationships and partnering to be established.

Again, we can observe how contractors who traditionally were viewed as a combative group, are now keener on this collaborative arrangements, because of the reduction of risk and the increase in the reliability of profits, as it have been explained in question number 6. On the other hand, we observe how, unfortunately, consultants and particularly clients are not quite optimistic with partnering and long term relationships if the demand of new building suddenly decreases.
9.1.3.22 Question number 22. Partnering and the inconsistent workload

Question 23: The CE’s targets seem to be plucked out of the air.

The results of this question are particularly good. Despite the difficulties they have found in the implementation of these initiatives, they believe that targets are achievable; and as a result, these optimistic responses are very good news for the industry. The only negative point comes from the big number of people who did not wish to answer and what make us think that more evidences of the change are still demanded.

9.1.3.23 Question number 23. CE’s targets
Question 24: I would like to be informed of the results of this study

This question was designed with the purpose of measuring whether the respondents felt that the questionnaire was interesting. Looking at the results, I think that a very good job was done.

9.1.3.24 Question number 24. CE’s targets

9.1.4 Conclusions of the questionnaire

Going back to the aims of our questionnaire

- **1. Awareness, feelings about the current and the future success and commitment to the programme.**

  i. The effort made by the CE (conferences, workshops, guidelines…) in order to spread the Rethinking Construction spirit, seems to have succeeded.

  ii. The Construction Excellence is working very well, especially at the local level.

  iii. Clients are the least believing when they should become the core of the process, principally because they are who decide the procurement route and are the ones who the industry wants to serve.

  iv. The industry desires to do it alone rather than to rely on the others.

  v. Most of the respondents have seen an improvement in the industry and those who have not seen it, are sure that there is going to be an improvement in the
industry in the immediate future. Therefore, there is a promising future according to the opinion of the people involved in the CE.

vi. The commitment of the respondents is more than high.

- **2. Valuation of the main problems of the UK construction industry.**

i. Adversarial relationships and skill shortage are seen as the main problems, while inflexible regulation and poor use of management tools are seen as the least important ones.

ii. Some consultants are still reluctant to admit that fragmentation is an acute problem, because they might fear that without a border line between the design and construction, their historical independence from contractors is going to disappear.

iii. Despite the fact that consultants admit that there is a problem because of the poor use of off site construction; they still want to point out that they have to consider not only costs, but also other issues like appearance, functionality amongst others.

iv. The poor use of management tools, might be more acute with small companies

v. The inflexible regulation is not viewed as a main problem by a large number of consultants; which is a further evidence of the fragmentation of the industry, since the problems of one party are not considered by the other one.

- **3. Valuation of the main initiatives: partnering, benchmarking and “investor in people”**.

**Partnering**

i. Partnering has been valuated by the respondents as the most successful initiative of CE, especially in terms of quality and personal satisfaction.

ii. There has been a reduction in costs in the respondents’ partnering experiences. Furthermore, some respondents wanted to point out that there are other important benefits that have been achieved, which are difficult to measure in terms of money.

iii. Better defined projects with better monitoring and the involvement of all the parties in the project have brought about an improvement in the risk management and a reduction in the time of execution.

iv. Nevertheless, a significant part of the respondents wanted to point out that partnering is not the only good procurement route, and there are other suitable approaches depending on the type of work.

v. One of the most important conclusions of this questionnaire is that contractors, who traditionally were viewed as a combative party, are now completely
committed to collaborative working. Partnering permits them a better management of risks and as a result, there is an improvement in the reliability of their profits.

**Benchmarking**

vi. We think that in the future, benchmarking is going to be better valuated by CE members. Perhaps, it is needed to explain better how to use them properly and how to prove with evidence, the huge benefits that this tool can bring about, as well as, there might be a need for more useful data to be used. In Wales, the *Benchmarking Club in Wales* could help in providing these useful data.

**Investor in people**

vii. This is the poorest valuated initiative. A possible explanation might be that the industry would like to tackle the lack of skilled professionals with a proper scheme of degrees and educational training courses; however, accreditations are not a guarantee of effective promotion of communications and training issues.

**Demonstration projects**

viii. People agree that there is a need for champions in order to demonstrate the success of partnering, benchmarking... and the knock on effect they bring throughout the industry.

ix. A significant number of respondents might find the reading of demonstration project pointless, because they are vaguely explained.

### 4. Problems that may make difficult the working of the programme.

i. Contractors are able to contribute by bringing more quality; consequently, clients should not choose on the lowest price basis.

ii. Clients fear that contractors are using CE as a way to improve their marketing.

iii. The respondents think that the size of the company is not a problem for the success of a partnering arrangement. The success is more related with trust and also with the works’ turnover, which has to be significant to the firm.

iv. There is a wide range of opinions about the loss of influence of the consultants in the partnering arrangements.

v. Large contractors believe that they can avoid fragmentation.

vi. Clients see “whole life costs” and “value for money” as vaguely defined concepts, especially when they are paying extra initial costs for something that is yet to be proved.

vii. Respondents do not see risk in the open books contracts.
viii. Clients and consultants are pessimistic about the success of partnering and long term relationships if the workload decreases. Contractors do not share this view, because they are the group that seems to benefit more from this initiative.

ix. People involved in the CE feel that CE’s targets are achievable; however, it is important to notice the high number of people demanding more evidences.
9.2 Consell Insular de Mallorca

9.2.1 Aims

With the intention of studying the Spanish construction performance a questionnaire was sent to the “Direcció General de Carreteres del Consell Insular de Mallorca’s” data base. The questionnaire has two different aims. On the one hand, it wanted to find out which were the problems of the Spanish construction sector, and on the other hand, wanted to measure the response of the Spanish industry to initiatives such as Partnering, KPIs or Respect for People.

In addition, we could have an interview with the “director general de carreteres” (Ilm. Sr. Gonzalo Aguiar González). As a result of this interview, we could understand more the stance of the Spanish public authorities in relation to construction problems.

9.2.2 Results

The questionnaire was sent at the beginnings of January 2005 to 60 members of the “Direcció Insular de Carreteres del Consell Insular de Mallorca’s” data base, and most of the responses arrived within two weeks. There were 18 responses, mostly coming from the contractors’ party.

The number of respondents according to their role was:

- 13 Contractors (most of them medium or large contractors)
- 3 Consultants
- 2 Subcontractors or suppliers
- 18 Totals

9.2.3 Analysis of the results by question number

The explanations and comments at this questionnaire, are not going to be as exhaustive as the ones done at the first questionnaire, because the results of the first part of our questionnaire are quite similar to the results of the questionnaire carried out by the “Gabinet d’Estudis Econòmics S.A.”, which can be consulted at the small summary Table 4.8.1.

Question 1: Valuate the current performance of the industry in the following fields.

This section was designed to look at the current performance of the industry and how the different parties valued it. Most of the responses come from the contractors’ party; consequently the responses from the other parties are not
conclusive at all. However, the interview inducted to the “director insular de carreteres” can help us to understand the public authority stance.

*Graph 1.1, graph 1.2 and graph 1.3* reveal something already pointed out at *section 4.8*. The Spanish clients are quite satisfied with the current performance, though the end users are not. It must be admitted that the bellowed graph shows the point of view of contractors, who are obviously interested in promote their good job. However, the interview inducted to the public authorities and the study carried out by the “Gabinet d’Estudis Economics S.A.” reassert this thesis.

![Graph 1.1 Clients’ quality satisfaction](image)

**9.2.3.1 Question number 1.1. Clients’ quality satisfaction**
9.2.3.1.2 Question number 1.2. Clients’ cost satisfaction

9.2.3.1.3 Question number 1.3. Clients’ time satisfaction

As it could be predicted on advance, contractors do not want to give their opinion about its own benefits.
9.2.3.1.4 Question number 1.4. Contractors’ benefits

The industry, at least, acknowledges that it has a poor Health and Safety issues. Most contractors admit that the current situation of the industry about this particular issue is quite improvable.

9.2.3.1.5 Question number 1.5. Safety

*Graph 1.6* shows how contractors complain about the adversarial attitudes and lawsuits they have to cope with. As we have said in other sections, this is one of
the reasons that explain why contractors are now so keen on collaborative arrangements in the UK.

9.2.3.1.6 Question number 1.6. Safety

The responses at question 1.7 are quite interesting. Contractors admit that the current supply chain is not as efficient as they would like it to be. Consequently, they reckon that there must exist other ways of managing the supply chain with better results.

9.2.3.1.7 Question number 1.7. Inefficiency
Questions 2 to 9 looks at Spanish problems.

This section was designed to look at the Spanish construction problematic situation and to try to check how the different parties involved in the construction industry see the problems affecting the industry performance. Nevertheless, the results only permit us to take conclusions about the contractor party.

There are some important differences in the way the Spanish industry sees the construction problematic Spanish situation in comparison with the way UK does.

- The UK respondents see the adversarial relationships inside the construction industry and the skill shortage as the main problems, while inflexible regulations and poor use of management tools are seen to be the least important ones.

- On the contrary, Spanish respondents indicate the bidding system and the skill shortage as the main problems. They also perceive fragmentation, inflexible regulation and public clients without resources as important problems to consider. However, adversarial attitudes, poor use of prefabrication and poor use of management tools are not seen as a real problem.

![2. Fragmentation](image)

9.2.3.2 Question number 2. Fragmentation
3. Adversarial attitudes

4. Poor use of prefabrication

9.2.3.3 Question number 3. Adversarial attitudes

9.2.3.4 Question number 4. Poor use of prefabrication
9.2.3.5 Question number 5. Poor use of management tools

9.2.3.6 Question number 6. Inflexible regulations
9.2.3.7 Question number 7. The bidding system

9.2.3.8 Question number 8. Skill shortage
9.2.3.9 Question number 9. Clients without resources

**Question 10: (Partnering)**

Questions 10, 11, 12 and 13 examined what the industry thinks about the possible benefits that similar initiatives to CE’s ones could bring about to the Spanish construction sector. Explaining the main features of the main schemes of the British programme such as Partnering, KPIs, Respect for People and the Local Clubs, these above mentioned questions tried to speculate about the possible success of these schemes in our country.

In question 10 our respondents were asked whether they feel that a better communication and a more trustful atmosphere could help in order to clients’ and other members’ of the supply chain could achieve their requirements not to lose the relevant project information through the supply chain.

Looking at the graph below, it seems that the industry acknowledges that other attitudes and relationships between all the parties involved in the construction process could help to improve problems such as fragmentation, adversarial attitudes or litigation. Although it must be admitted that this response does not mean that they would like to implement initiatives such as partnering, but at least, it means that they feel that there is a scope for improving in this field.

Some respondents add interesting comments at this question. One medium contractor expresses that coordination and planning are issues that should be promoted more. On the contrary, a consultant comments that this initiative is not necessary due to the good relationships that exist in small construction markets such as the one that exists in Mallorca.
9.2.3.10 Question number 10. Partnering

Question 11: (KPIs)

In question 11 our respondents were asked whether they feel interesting to compile some information about the project such as clients’ satisfaction, cost, quality, productivity amongst other issues, with the intention of being used later on to benchmark their company or their projects against the industry or against other similar companies.

The response was good, but to be honest it was expected a better response. The people consulted or interviewed had shown a big interest in this initiative, because they think it can be a useful alternative to the ISOs and also a good way to set up targets to improve their own business.

A respondent expresses about this scheme suggested at question 11, that it would be interesting not only for benchmarking against other firms, but also for improving professionalism and for encouraging a better communication with clients.
Question 12: Respect for people

Question 12 tried to find out whether the industry feels that launching a programme, which tried to make more attractive construction jobs by reducing accidents, enhancing workers’ welfare and training, improving the conditions sites and so on, could help the industry to face its skill shortage.

The graph bellowed indicates a good valuation to the suggested initiative from our respondents. However, it is felt that their response could be even better if the initiative mentioned the need of a new proper scheme of degrees.
Question 13: Construction Excellence

As it has been observed in the results of question 9, the industry suggests that some small public authorities do not have the resources to deal with some sort of projects. For this reason, at this question it was suggested if our respondents felt interesting to establish an agency like Construction Excellence’s clubs with the objective of advising, especially, small clients and small companies who wants to improve their business performance.

The response at this question is not as good as the ones observed in the former questions. Although the industry’s opinion is that there exist some small clients without enough resources, they might think that a sort of agency as explained before is not needed at the moment.

At this question, a large contractor add its own point of view and comments that such organisations already exists, however, they are not doing what they are supposed to do and they are too much politicized.
9.2.3.13 Question number 13.CE

9.2.4 Conclusions of the questionnaire

Going back to the aims of our questionnaire

- 1. Valuation of the current performance of the Spanish construction sector

i. As it has been mentioned before, the conclusions of the first part of our questionnaire are the same ones achieved by the questionnaire carried out by the “Gabinet d’Estudis Econòmics S.A.” Both questionnaires results show an industry that although it knows that there exists a problematic situation, it does not see the huge scope of improvement that could be brought if it was tackled properly.

ii. Public clients are quite satisfied with the quality offered by the industry, and also with the time and costs of execution, while the end users are complaining about them.

iii. The industry acknowledges some problems such as the current bidding system, fragmentation, skill shortage and adversarial attitudes. Nevertheless it is not as concerned of them as the British industry, with the exception of the bidding system and the skill shortage, where the industry is very worried.

iv. The industry does not see any problem due to the poor use of prefabrication, standardization or management tools.
v. It seems that adversarial attitudes are smoother because most works have small turnovers, and normally are carried out by local companies. The Spanish construction market seems to be a closed market where the local companies shares out projects, and as a result, public clients and companies are interested in having good relationships.

- **2. Valuation of similar CE’s initiatives**

i. Contractors, who have to face with problems coming from adversarial attitudes, and sometimes with the subsequent lawsuits, seem to be very keen on the use of partnering arrangements. Some of them express that by implementing this initiative, they also could benefit from a better planning and coordination.

ii. The industry seems to be interested in Key Performance Indicators as a good alternative to the ISOs.

iii. The industry admits that it is not attractive and as a result it is difficult to recruit skilled people. For that reason, initiatives as Respect for People would be welcome. However, the construction sector needs also a new scheme of degrees so as to overcome its skill shortage.

iv. Although the Spanish construction industry thinks that there exist small clients without enough resources, they do not seem to be interested in any agency which could advise them or advise other small construction companies demanding to improve their business performance.