

A strategic framework for retrofitting of existing properties within the social housing sector in the UK

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1. Introduction

Living in the current state of the post Covid-19 pandemic, in unprecedented times or what is now being referred to as ‘the new normal’, where concepts of sustainability have never been so important, now is the time for us to tackle climate change for our future generations.

In 2019, the United Kingdom (UK) Government made a commitment to reduce greenhouse gas emissions (GHG) to ‘Net Zero’ by 2050, ending the UKs contribution to global warming within 30 years. One of the top three sources of emissions is from the residential sector, which accounted for 19% of all CO₂ emissions in 2019. (DECC, 2019). The English Housing Survey Headline Report (EHS) (2020) indicates that there were an estimated 24.2 million households in England in 2018, and while carbon emissions have been reducing since 2013, it has not been reducing at the required rate if we are to meet the Climate Change Act target of ‘Net Zero’ by 2050. In addition, with many households having at least one family member working from home due to Covid -19, it is anticipated that energy consumption from residential properties will increase.

The UK has some of the oldest building stock in Europe (Peel, et al, 2020); (Marchand, et al, 2015); (Boardman, 1991), and with over 80% of the buildings in 2050 having already been built in the UK (Chartered Institute of Chartered Surveyors, (CIOB) 2013); (UKGBC, 2020), the UK Governments priority is to decarbonise existing buildings. According to Her Majesty’s (HM) Government (2014) social housing, which supports some of the most vulnerable in our society has a great role to play in the deployment of energy efficiency measures on a large scale and is seen as the key to a successful strategy. The Government needs the social housing sector who own approximately 4 million (17%) households to kickstart retrofitting of poorly performing properties across the whole of the residential sector not only to reduce carbon emission and help eradicate fuel poverty, which statistics indicate there are 2.5 million households, but also to kickstart the UK economy after the pandemic. However, over the last few years it has been well documented within existing literature that there is a lot of barriers to overcome (Jenkins, 2009); (Crilly, 2012); (Brown et al, 2014); (Peel, 2020), (Swan et al 2013).

In the UK social housing landlords generally work on a 30-year business planning cycle; and there are several evolving national policy areas which will force change to their business plans. With the UK Government pushing to reduce emissions, to meet the ‘net zero’ challenge by 2050, it can be argued that to increase their chances of success while improving performance, retrofitting of existing properties needs to be planned in a strategic way. Previous research by Hendrick (2003); Poister (2010) and Wheeland (2004), has established that effective strategic planning can be influential in establishing significant change. In addition, Bryson and Roering (1987, p9) identified that strategic planning ‘*can help public sector organisations deal with dramatic changes in their environment*’ by providing a set of concepts, procedures, and tools.

With less than 30 years left till 2050 and insufficient policy guidance (Swan et al, 2013a); (Peel et al, 2020), (Palmer et al, 2018) and sector leading experts; Savills estimating that the sector needs to invest £3.5bn per year in the UK to meet the targets, social housing landlords need to collaborate and knowledge share (Rodger et al, 2020); (Raslanas et al, 2010) not only with those inside the sector but also with outside organisations. Although it can be challenging for the social housing provider to convince others to work collaboratively and share knowledge, it is crucial to success if they are to deal with the significant challenges ahead (McGowan and Stevens, 1983).

2. Aim of the study.

The aim of this study is to develop a strategic framework for social housing providers in the UK, which will support organisations when strategically planning to implement retrofit solutions to their existing property portfolio to meet both the interim minimum rating of EPC Band C by 2035 and the 2050 'Net Zero' target. The strategic framework will lead on best practice from across the sector, providing a tool for social housing providers to use. It will look at the bigger picture and deliver a structured approach for implementing retrofitting measures, charting direction which meets the customers' expectations, and delivers business success and excellence across the sector.

Research suggests that there is a growing need for a framework which will support organisations when strategically planning and implementing retrofit solutions to their existing property portfolio. A recent study undertaken by Inside Housing (2020), highlighted that many social housing providers were yet to develop a detailed zero carbon plan, specific to their housing stock, in addition it stated that *'it would be useful if the sector worked together to the 2050 target, allowing landlords to reap the benefits of shared learning'*.

3. Research methodology

This research is based on a single case study organisation, Onward Homes, in the UK social housing sector. Onward Homes has been selected as it is one of the largest social housing providers in the Northwest of England, owning and managing 35, 000 properties. The study utilises an exploratory sequential mixed methods approach, collecting both qualitative and quantitative data in a sequential approach to gain a breadth of understanding of the subject before creating the framework for validation and testing. An exploratory sequential mixed methods approach is deemed suitable for this study as the existing literature has indicated that there is a need to develop a framework, as none currently exists. Creswell (1999) and Creswell et al (2004) supports this by suggesting that the exploratory sequential design 'is suitable when the researcher needs to develop and test an instrument because one is not available. The study is in its first phase; an extensive literature review is nearing completion, and the methodology for the study has been designed and data collection is imminent.

4. Contribution to professional practice

This study provides a tool to support social housing providers when strategically planning and implementing retrofitting measures which will not only help meet the UK Governments targets for both carbon reduction and fuel poverty policies, but it will also help meet our international targets under The Kyoto Protocol to reduce the levels of greenhouse gas emissions (GHG). Covid-19 has resulted in a significant economic downturn, thousands of people have lost their jobs due to local and national lockdowns. However, by reskilling those individuals and training apprentices to install sustainable retrofit measures it is possible to grow the UK economy while tackling climate change.

All countries from around the world are facing challenges of providing good affordable homes, while working towards a net zero carbon target. This study makes a significant contribution by stimulating change in both my organisation, Onward Homes, and across the wider social housing sector. It is envisaged that the research adds a significant contribution to the current knowledge on retrofitting within the social housing sector, while the strategic framework pulls together best practice from across the sector, to provide a tool for social housing providers to use not only in the UK but internationally.

It delivers a structured approach which meets the customers' expectations and delivers business success and excellence across the sector, driving more organisations to install retrofitting measures to their portfolios by improving the way in which they go about the process. This in turn creates the exemplars needed to stimulate growth across the whole of the residential sector, which the Government so desperately need to meet 'net zero' target.

Keywords: social housing, strategic planning, sustainable retrofit.

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