LDNY360 / EMERGING INTELLIGENCE

Construction Intelligence

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Large development and ownership decisions are moving, but conversion and profitability still depend on disciplined counterparty, carbon and procurement choices.

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Executive reading. The £2.705bn Thameside West agreement revives a 5,000-home Royal Docks pipeline, while Endless has taken majority control of Weston Group after sustained offsite losses. Cement-import data and construction insolvencies show why pricing, provenance and credit discipline remain material even as failure volumes ease. In Ireland, Clúid has opened a €400m route for planning-ready Dublin housing and the OPW has extended the Moore Street heritage-works deadline to 26 November. The immediate commercial split is clear: engage early on maturing capital programmes, but distinguish development agreements and procurement envelopes from secured construction revenue.

Projects, Investment & Development Pipeline

GREATER LONDON AUTHORITY UK6 NOTICE / CONSTRUCTION ENQUIRER | 17 NOVEMBER 2026

£2.705bn Thameside West development agreement revives Royal Docks pipeline

Reported facts. The Greater London Authority has published a UK6 transparency notice for a 30-year development agreement with Arada-backed Silvertown Homes covering Thameside West. The 47-acre Royal Docks masterplan provides for at least 5,000 homes, a seven-acre park, commercial space and a kilometre of waterfront. Arada has submitted plans for the first 1,500 homes across six buildings; Gensler, Arup and Planit are on the design team.

Client/landowner: GLA Land and Property | Developer: Silvertown Homes / Arada | Location: Royal Docks, Newham, London | Published agreement value: £2.705bn | Stage: direct development agreement; planning still required | Target: first construction in 2028; formal signing expected 17 December 2026

Why it matters.	Suggested action.
The agreement removes a long-running land and delivery constraint and creates a major London residential-led pipeline. The value is a long-term development agreement, not a single construction award; Arada London is positioned for the opening phase and wider supply-chain access will depend on planning and package strategy.	Map the first-phase design and procurement chain now; target Arada London, Gensler and Arup with evidence relevant to high-rise residential, infrastructure, façades, building services and Building Safety Act gateways.

Contract Awards & Market Movements

CONSTRUCTION ENQUIRER / COMPANIES HOUSE FILINGS | 17 NOVEMBER 2026

Endless takes majority control of Weston Group after offsite losses

Reported facts. Private-equity investor Endless has acquired at least 75% of Weston Group through Project East Bidco and provided new funding. Weston Homes retains its brand and management under chief executive Peter Gore, while founder Bob Weston steps back. Weston Group reported £208m turnover and a £4.5m pre-tax loss for the year to July 2025; British Offsite has accumulated losses of about £43m over four years.

Organisations: Endless LLP; Weston Group; Weston Homes; British Offsite | Geography: London and Home Counties | Purchase price / new investment: not disclosed | Stage: ownership and refinancing completed | Output: 595 homes in latest reported year

Why it matters.	Suggested action.
The transaction brings restructuring capital into a £200m-plus housebuilding group and puts the performance of its automated offsite platform under new ownership scrutiny. It may alter development pacing, procurement discipline, supplier terms and the strategic role of British Offsite.	Suppliers and advisers should revalidate credit, payment and pipeline assumptions; growth and ownership teams should watch for portfolio prioritisation, operational reset and partnership opportunities rather than assuming immediate volume growth.

Business, Commercial & Supply-Chain Risk

MINERAL PRODUCTS ASSOCIATION ANALYSIS OF HMRC DATA | 17 NOVEMBER 2026

Non-EU cement share reaches 29.3% as EU carbon rules redirect imports to Britain

Reported facts. The Mineral Products Association reported that non-EU cement represented 29.3% of UK cement imports from January to September 2026, up from 17.1% a year earlier and the highest share in records dating to 2000. The MPA links the shift to the EU Carbon Border Adjustment Mechanism and warns that UK producers face unequal carbon costs before the UK CBAM begins on 1 January 2027.

Organisation: Mineral Products Association | Geography: United Kingdom | Evidence period: January-September 2026 | Non-EU import share: 29.3% versus 17.1% | Stage: market and policy risk; not a forecast of shortage or price movement

Why it matters.	Suggested action.
Changing import routes may affect embodied-carbon evidence, product provenance and price competition. The immediate commercial risk is not simply cheaper cement: specifications and carbon claims may become harder to compare while UK and EU border regimes remain misaligned.	Ask cement and concrete suppliers for source, verified product declarations and carbon-cost assumptions; stress-test tenders and decarbonisation claims against UK CBAM implementation and possible EU-UK policy alignment.

INSOLVENCY SERVICE ACCREDITED OFFICIAL STATISTICS | 17 NOVEMBER 2026

Construction insolvencies ease, but the sector still accounts for 17% of cases

Reported facts. The Insolvency Service recorded 277 construction-company insolvencies in England and Wales during October 2026. Across the 12 months to October, construction accounted for 3,800 insolvencies, or 17% of cases with an industry recorded. The annual construction total was 5% lower than the preceding 12 months; all-company insolvencies in October were 15% lower year on year.

Publisher: Insolvency Service | Geography: England and Wales | Period: October 2026 / rolling 12 months | Monthly construction cases: 277 | Rolling construction cases: 3,800 | Status: provisional accredited official statistics

Why it matters.	Suggested action.
Failure volumes are moving in the right direction but remain concentrated in construction. The aggregate improvement should not be read as a release from counterparty risk, especially where low margins, delayed starts or ownership changes are present.	Keep monthly credit, payment and capacity checks on critical subcontractors and suppliers; combine statutory data with project-level cash-flow exposure rather than relaxing controls on the sector trend alone.

Republic of Ireland - Dublin & Wider Market

TED / ETENDERS | 17 NOVEMBER 2026

Clúid opens €400m Dublin residential development competition

Reported facts. Clúid Housing Association is seeking developers or contractors with sites that already have full planning permission for residential development in County Dublin. The open works competition is divided into five lots and uses development agreements with stage payments. The published procurement envelope is €400m excluding VAT.

Buyer: Clúid Housing Association | Location: County Dublin | Sector: residential / social and affordable housing | Published overall value: €400m excluding VAT | Stage: live open competition; sites must have full planning permission | Deadline: 14 December 2026, 12:00 UTC | eTenders resource: 9495429

Why it matters.	Suggested action.
This converts Dublin planning-ready land into a near-term delivery route and gives a clearer test of whether the city's planning pipeline can become funded housing production. The €400m is the procurement envelope, not guaranteed revenue for any participant or lot.	Urgent: qualify planning-ready sites, title, funding, utilities and delivery capacity immediately; form developer-contractor-finance teams before the 14 December deadline and avoid treating the five lot entries as additive values.

OFFICE OF PUBLIC WORKS / TED CHANGE NOTICE | 17 NOVEMBER 2026

Moore Street conservation works deadline extended to 26 November

Reported facts. The Office of Public Works has extended the participation deadline for the restricted procurement to conserve and adapt 14-17 Moore Street and create a visitor facility at 8-9 Moore Lane, Dublin 1. The scope includes historic-building conservation, refurbishment, electrical and mechanical installation, plumbing, lifts and restoration work. The published delivery period is 14 months; no contract value is stated.

Buyer: Office of Public Works | Location: Moore Street / Moore Lane, Dublin 1 | Sector: heritage and visitor facilities | Stage: restricted works competition / change notice | Previous deadline: 23 November 2026, 12:00 UTC | New urgent deadline: 26 November 2026, 16:00 UTC

Why it matters.	Suggested action.
The extension is a narrow but material reopening for suitably qualified heritage teams. The multidisciplinary scope makes conservation competence, occupied-city logistics, MEP integration and PSCS capability central to selection.	Urgent: use the three-day extension only if the required conservation and PSCS evidence is already credible; verify the amended eTenders documents and submit before 16:00 UTC on 26 November.

Immediate leadership reading

1. Treat Thameside West as a long-horizon pipeline and map the opening-phase chain, not as £2.705bn of available work. 2. Recheck Weston exposure and watch the new owner's priorities. 3. Tighten cement provenance and counterparty controls despite improving insolvency volumes. 4. Act quickly on planning-ready Dublin housing and the amended Moore Street deadline.

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