

Competition and Markets Authority

Civil Engineering market study



Welcome and Session Overview

Housekeeping points

- Webinar is expected to last around 45 minutes
- Webinar will be recorded for internal purposes
- Presentation part of the webinar will be published online, but not the Q&A part

	Agenda item	Duration
1	Welcome, introductions, and opening	5 minutes
2	Presentation	20-25 minutes
3	Q&A	15-20 minutes

About Us

Who we are

- Independent public body working to promote competitive markets and tackling unfair behaviour within the UK in order to support growth, opportunity and prosperity for the UK



Some of our core responsibilities

- Understand why markets may not be working well and take/recommend action to help them work better
- Provide advice to government and public bodies to promote competition and interests of consumers to deliver long-term growth and prosperity
- Protect people and businesses from unfair trading practices
- Investigate businesses where we suspect they have breached UK competition law, tackling and deterring breaches



Background

Market study launch

- CMA launched our market study on 19 June 2025 into the supply of UK roads and railways
- On launch we published a Statement of Scope setting out themes and key questions that interested stakeholders can respond to by 17 July 2025
- Statutory deadline of 18 June 2026 to publish our final report (12-month deadline) – aim to complete study by April 2026

Why civil engineering?

- Impact of delays on UK businesses and consumers
- Perception that big infrastructure projects take longer, and cost more compared to our international counterparts; Evidence of high procurement cost, including in rail
- Wider public policy and procurement considerations
- A better functioning market could be a key enabler to unlocking growth

Proposed areas of focus

Themes the market study will explore

- Opportunities to transform public procurement so that both the public sector and industry are incentivised to build more cost-effective infrastructure and grow the UK's supply chain
- The impact of regulatory frameworks, including planning regulations
- Structure and competitiveness of the supply chain
- Allocation and sharing of risks

Rail and road sector focuses

- Publicly financed and publicly owned rail and road, including national and local roads
- Full project life-cycle: funding, design, procurement, planning and construction
- Excluding trams, underground rail and private roads

Market Study timeline

Stage 1

Launch

June 2025

Stage 2

Evidence gathering
and analysis

June – November 2025

Stage 3

Consultation on our
emerging thinking
and remedies
(if any), and finish
evidence gathering
and analysis

December 2025 –
February 2026

Stage 4

Final report

March – April 2026

Next steps

Engagement approach

- We will work collaboratively with firms to understand market challenges and identify ways to create innovation, productivity and growth that will benefit the whole country.

Information gathering

- May take the form of (but not limited to) bilateral discussions and roundtables, as well as information requests and questionnaires.

Potential outcomes of this market study may include:¹

Potential Outcome	Description	Likelihood
Recommendations to Government and Public Authorities 🏛️	Recommending legal, regulatory or policy changes to address any problems identified in the market	Currently expected
Guidance to Businesses 📖	Issuing guidance or recommendations on best practices to improve market functioning	Not currently expected
Market Investigation Reference 🔍	In-depth follow-up investigation	Not currently expected

¹ Other potential outcomes of this market study (not currently expected) include action for the benefit of consumers, action to investigate and enforce consumer and competition law, a clean bill of health, acceptance of undertakings in lieu of a reference (UILs).

Q&A

We welcome your questions and reflections, particularly on the following:

- The focus and scope of the market study
- Any areas of the timeline or process where further clarity would be helpful
- Suggestions for how we can engage most effectively with stakeholders throughout the study