

The Procurement Playbook

Change construction
to change the world



PEOPLE

The built environment impacts **every human being**, everyday.

Construction provides the:

- Homes we live in
- Schools we learn in
- Shops we buy from
- Hospitals we heal in
- Infrastructure that moves us around the world



IMPACT

Construction is the world's largest industry.

Massive global impact:

- US\$15 trillion, or 13% of the world's GDP
- 7% of the world's population works in construction



COMPLEXITY

Construction is incredibly complex.

Hostile environment

- Sites are outdoors, exposed to weather/elements, poor connectivity

Complex & fragmented supply chain

- Workforce of many different players & skills needed to deliver projects

Each project is unique

- Variable scopes, sites and people results in lack of standardisation & repeatability

Land & regulatory constraints

- Environmental, social, safety and government requirements to comply with



ENVIRONMENT

39% of global carbon emissions come from the built environment.

Environmental impact

- Construction's carbon emissions expected to double by 2050
- Shops we buy from

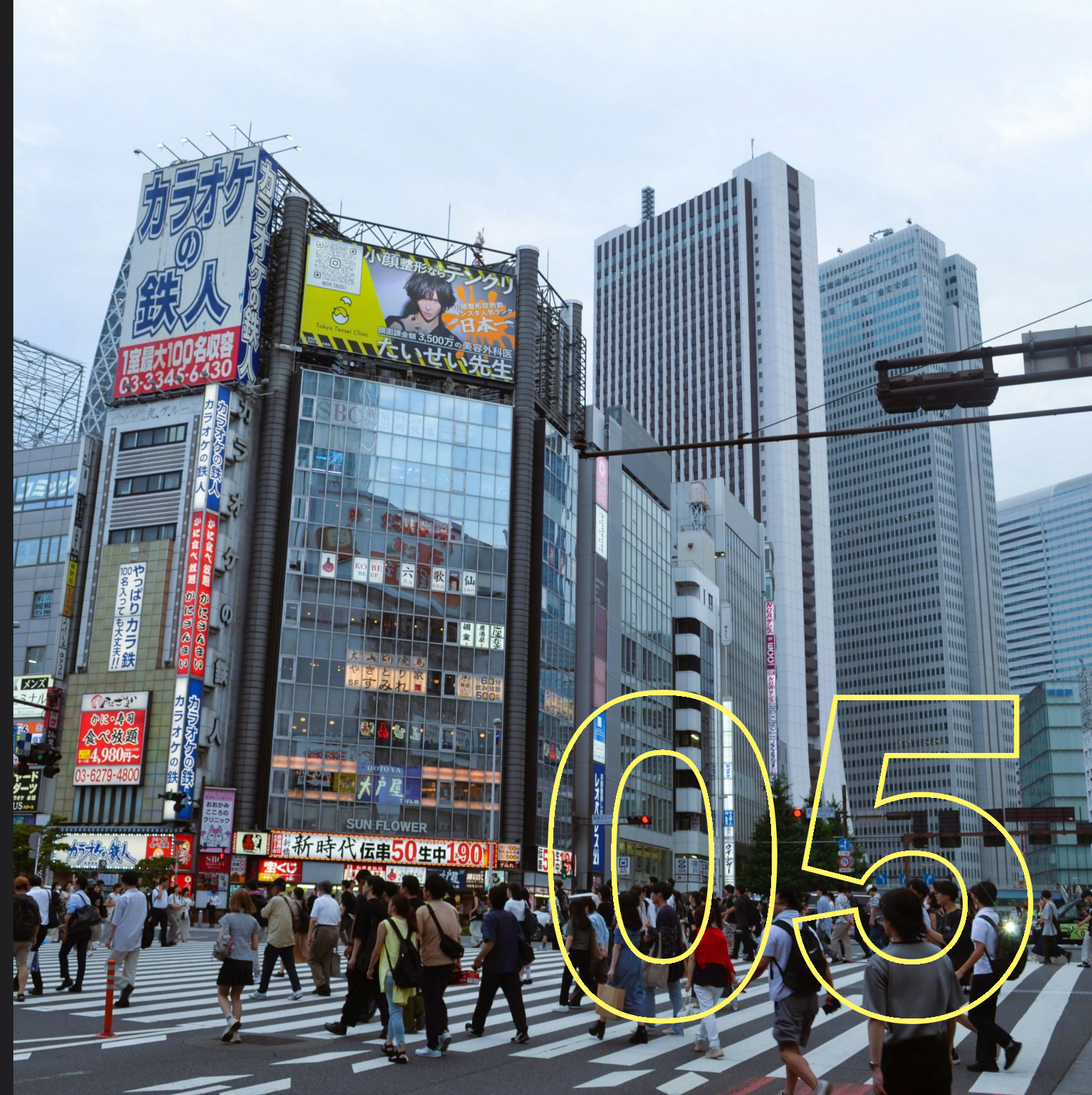
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Population growth and increased standards of living drives **global demand** for construction.

Increased demand

- Demand for construction will only increase into the future



UNDER SUPPLY

Demand for construction **significantly outpaces** the world's ability to deliver over the next **50 years.**

Enduring shortfall

- Shortages in labour, materials and building innovation means something needs to change



Construction productivity growth of only **1% per year** for the last 2 decades.

Lagging behind

- Construction is 2nd last in industry digitisation, marginally better than Agriculture and Hunting



TECHNOLOGY

Construction innovation will define the future of the world we live in.

Many innovations needed

- Technology must impact every part of the construction value chain

