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## Anticipating tomorrow: the future of the European construction industry

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# Anticipating Tomorrow

The future of the European construction industry European Construction Institute Industry Futures Task Force



Recent years have been marked by rapid and quickening change in Western Europe and the rest of the world, which is altering the way in which infrastructure and manufacturing assets are produced and maintained. In response to these pressures, the ECI established the Industry Futures Task Force to improve the European construction industry's understanding of where it may be in 20 years' time. The Task Force has developed this suite of future scenarios for the European construction industry, and an action plan to help the ECI and its member companies adapt to the challenges ahead.

# The axes and the scenarios they produce

The horizontal axis represents a range of future possibilities for the availability of energy. At one extreme is Energy Scarcity, where energy becomes less available than we expect today. At the other is Stabilised Supply. Here, energy is readily available. This could happen because new reserves are discovered, or through technological advances in the supply and use of energy.

The vertical axis represents the balance in co-operation – ranging from Interdependent to Autonomous – between and within supply chains, international relationships and society as a whole.

These two variables lead us to four scenarios which illustrate what the European construction industry could look like 20 years from now. These scenarios were developed by extrapolating a range of today's key issues for the European construction industry, for the ECI, and for its member organisations.

> They range from a world where energy is scarce, renewable technology is widely used and it is culturally unacceptable to waste energy, which we call Yough Love, to one with stabilised energy supply in which individual self-interest takes presedence over the common good, which we term Fence Me In. The timelines for each Scenario depict a sequence of possible events which lead from the present day to the

year 2030.



The full text of the European Construction Industry Task Force report can be found on the ECI website: www.eci-online.org

#### **Our vision for 2030**

We want the European Construction Industry of 2030 to be the world's principal centre of excellence in the development of the built environment and manufacturing facilities. To achieve this we need to meet these challenges, which the ECI regards as the guiding vision of this task force:

- Be seen as an attractive, vibrant industry which school leavers, graduates and experienced professionals are attracted to and want to stay in
- Work in a way which encourages collaboration and support along the whole supply chain, and which feeds innovation and improvement
- Welcome and work with the shifts in world construction, in geographies, practices and requirements
- Develop and apply new construction techniques, using the best available technology to improve the construction process in design, speed, safety, value and control
- Ensure our activities are energy-efficient and have a minimal effect on the environment.

These scenarios suggest actions which can lead to a step change in performance to allow us to reach this future. These actions are outlined on the final page of this report.

## Next steps towards the vision

### For the ECI:

- Support the Industry Futures Task Force, and especially the new task forces on people and on collaboration
- Run annual award schemes to recognise sustainability, collaboration, innovation, people and natural resources
- Work to expand membership, and its engagement in best practice
- Influence regulation
- Collaborate with other organisations to develop and promote best practice
- Encourage members' innovation
- Drive stewardship, corporate social responsibility, ethics and sustainability
- Help members to use natural resources more efficiently and protect the environment
- Define sustainable best practice for the design of the built environment and manufacturing plant
- Encourage member companies to get involved with renewable energy.

For Members of the ECI and those associated with the construction industry:

- Engage with the ECI and its task forces
- Collaborate along the supply chain to encourage innovation and best practice
- Increase R&D and take controlled risks to embrace new techniques
- Recognise the value of people
- Develop and reward them to attract and retain excellence
- Increase links with schools, universities and the supply chain to share and use best practice
- Implement local practices to improve environmental performance and encourage sustainable construction and use
- Enter the ECI award scheme.





The European Construction Institute (ECI) is Europe's only transnational network of construction excellence. It brings together many of the most innovative clients, contractors, specialists and support organisations in Europe to develop and share knowledge aimed at improving the entire construction supply chain.

To learn more, contact the ECI: ECI UK, John Pickford Building, West Park, Loughborough University, Loughborough LEII 3TU, UK Tel: +44 (0)1509 223526

> Email eci@lboro.ac.uk www.eci-online.org