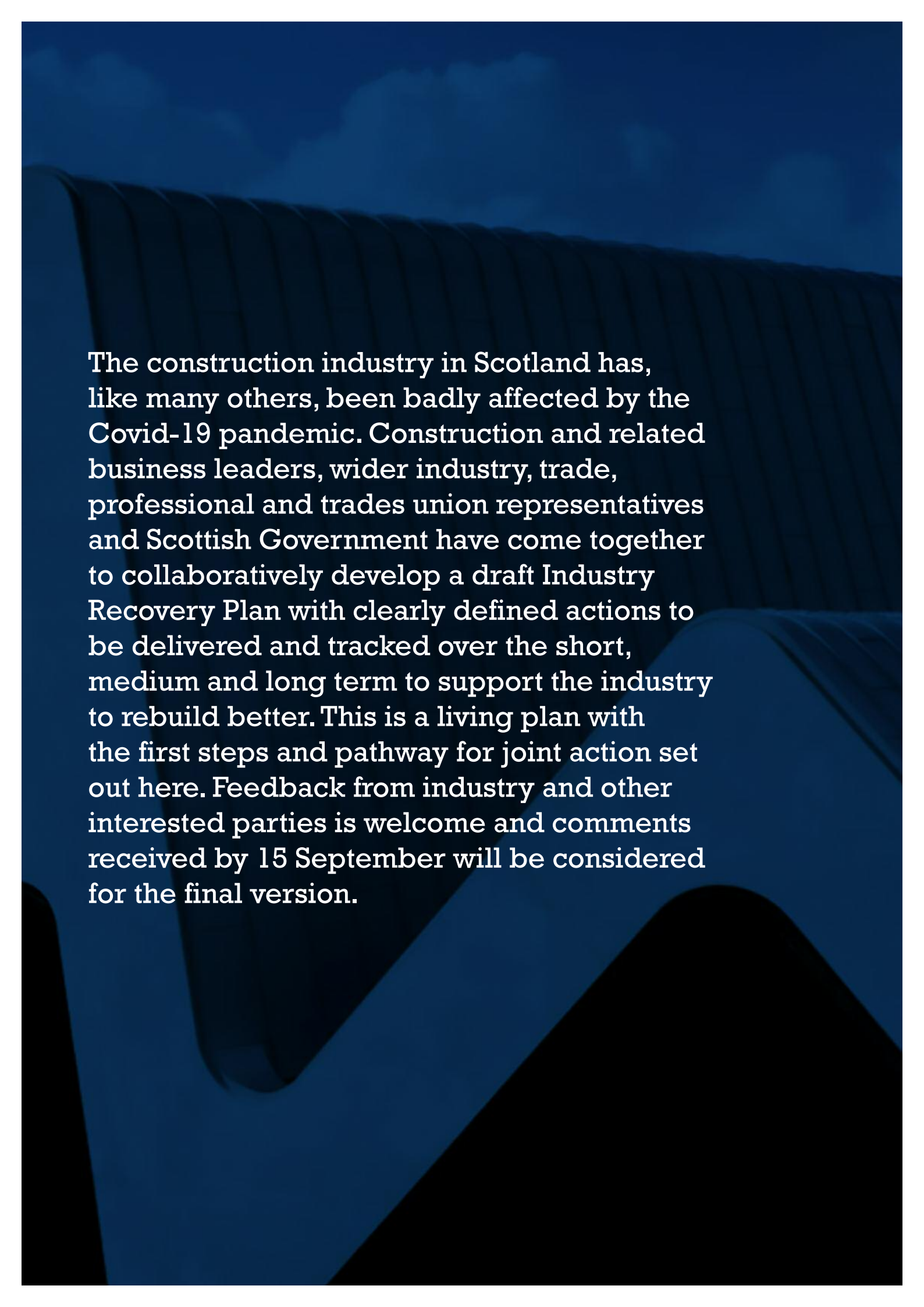


Scottish
Construction
Leadership
Forum

Scottish
Construction
Industry

Draft Recovery Plan



The construction industry in Scotland has, like many others, been badly affected by the Covid-19 pandemic. Construction and related business leaders, wider industry, trade, professional and trades union representatives and Scottish Government have come together to collaboratively develop a draft Industry Recovery Plan with clearly defined actions to be delivered and tracked over the short, medium and long term to support the industry to rebuild better. This is a living plan with the first steps and pathway for joint action set out here. Feedback from industry and other interested parties is welcome and comments received by 15 September will be considered for the final version.

Scottish Construction Leadership Forum

The Scottish Construction Leadership Forum is a collaborative initiative of [Construction Scotland](#) and the [Scottish Government](#).

It was established in March 2019 to develop and implement an action plan of improvement initiatives aligned with Government policies and the Construction Scotland Industry Strategy.

[Several streams of work are ongoing](#) and prior to Covid-19, the Forum was at the early stages of considering a wider agenda for change across the industry.

Scottish Construction Sector

The Construction Industry, as defined in [official economic statistics](#), represents approximately 6% of Scotland's GVA (2017) and employs in the region of 150,000 workers. The Forum represents a wider definition of construction, including all aspects and scales of building and civil engineering construction; the repair and maintenance of the built environment; and the associated design, professional services, manufacturing, materials, and machinery sectors. Some industry estimates put this wider construction industry at closer to 10% of Scottish GVA and 177,000 jobs.

The Forum does not focus on the development aspects of house building and commercial property development whose industry representatives are [Homes for Scotland](#) and the [Scottish Property Federation](#). However, the construction related elements of housing is included.

Scottish Construction Industry by numbers

£7.8bn GVA

Gross value added (GVA) in the Scottish construction sector in 2018 was £7.8 billion.

143,000 JOBS

Construction accounts for 5.5% of jobs within Scotland.

51,510 ENTERPRISES

As at March 2019, there were 51,510 enterprises operating in the construction sector in Scotland.

99% SMALL BUSINESSES

Small business enterprises of 0-49 employees equate to 99% of the sector.

Over 120

trade and professional organisations support Scotland's Construction Sector

50.7%

of all waste in Scotland in 2018 was from the Construction and Demolition Sector.

23% OF SCOTLAND'S APPRENCESHIPS

As of June 2020, there are 11,419 modern apprentices within 'Construction and Related' occupations in Scotland which accounts for 23%.

>£4BN SPEND PER ANNUM

The public sector spends over £4bn per annum and it is the largest category of spend by the Public Sector. This equates to over half of construction spend in Scotland.

It is important that the full scale and reach of the sector is fully understood and that Government and industry have a shared picture. To that end the Forum is working to develop a clearer statistical picture of the construction industry in Scotland and will publish further information here as it is developed.

The industry is important for more than its contribution to the economy and jobs. It is the creator and maintainer of our infrastructure, homes and wider built environment, which is all around us and plays a key role in how we live, work, learn and play. It is the industry which makes and enhances places and will have a central role in re-shaping those places to better suit the new ways of living and working which emerge from the Covid-19 recovery.

Over the medium and longer term the Industry is at the heart of literally rebuilding better for Scotland and will deliver perhaps the most significant element of Scotland's net-zero commitment. The construction industry will continue to de-carbonise building operational carbon through installation of energy efficiency measures and de-carbonised heat sources and will design and install the infrastructure to support decarbonisation of surface transport. In addition, it will reduce the embodied carbon of the products and materials it uses to deliver net zero carbon by 2045. Together these actions present the greatest decarbonisation challenge and opportunity for Scotland.

The industry is not without its longer-term challenges. It has a history of low productivity improvement, is highly cyclical in nature with short-term project based contracting relationships contributing to instability for workers and adversarial commercial arrangements with its customers and throughout supply chains. Some recent well documented quality failings have contributed to a mounting agenda for change across the industry. The Construction Leadership Forum and other groupings including the [UK Construction Leadership Council](#) are taking forward a range of collaborative actions to address these challenges and the addition of Covid-19 impacts has accelerated the need for change.

Covid-19 and Construction

The construction industry in Scotland has, like many others, been badly affected by the Covid-19 pandemic. Construction activity paused on all but essential sites from 23 March to 10 June 2020 as a part of the broad range of actions to support the public health response to the pandemic.

Official statistics on a quarterly basis are only available up to Q1 2020. In that quarter, the output of the Scottish economy as a whole contracted by 2.5 per cent compared with the previous quarter (2019 Q4) and by 2.3 per cent on an annual basis compared with the same quarter of last year (2019 Q1). The decline in output was even more pronounced in Scotland's construction sector which contracted by 3.4 per cent in 2020 Q1 compared to the previous quarter and by 5.6 per cent on an annual basis compared with the same quarter a year ago (2019 Q1). Analysis published in the Scottish Government's [State of the Economy: April 2020](#) and [July monthly Economic Briefing](#) found the construction sector to be one of the highest exposed sectors when assessing the potential impact of COVID-19 and an EU exit without a trade deal.

Annually, output in the Scottish construction sector contracted by 28.6% in June compared to the same month 12 months ago (June 2019). The [Business Impact of Coronavirus Survey](#) by ONS identified over half (51%) of construction firms in the UK reported that their turnover has decreased compared to what is normally expected for this time of year. In response to these difficult trading conditions, 87% of construction business applied to the coronavirus job retention which is higher than the average of all sectors of 78%. As of July 2020, 17% of construction employees remained on the furlough scheme and construction firms were actively recruiting only 1.2 job external vacancies, less than the average of 5.3 vacancies for all businesses in the UK. The Bank of England's recent survey of Chief Financial Officers indicated that employment levels in construction are predicted to be at their worst in the fourth quarter of 2020.

Scotland's Construction Industry

Business Confidence

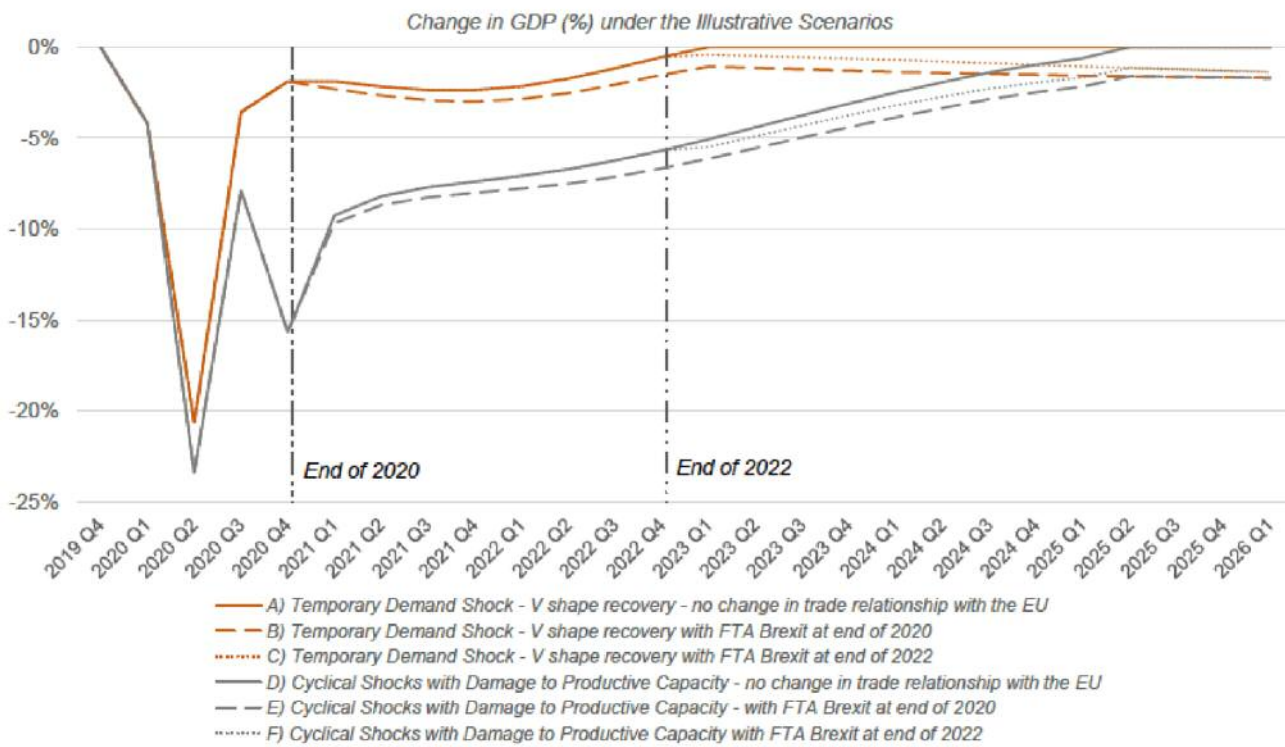
This decline in output was also reflected in business confidence for which Q2 data is available from the [Scottish Chambers of Commerce Quarterly Economic Indicator](#)

- > Business confidence in the sector was very negative as 70% of firms reported a decrease in confidence.
- > Investment intentions have suffered a heavy blow with more than half of firms reporting a decrease. Capital investment dropped and training investment has also fallen.
- > Levels of employment in the sector have reduced and the percentage of firms looking to recruit has fallen by more than half from 53% to 25%.
- > Cost pressures such as raw materials prices and other overheads are having a significant impact on firms, with 70% and 66% respectively of respondents indicating increased cost burdens from these.
- > Levels of cashflow and profits have seen substantial declines, with the majority of firms reporting falls for both trends, resulting in negative net balances of -64% and -76% respectively.
- > The construction sector is very depressed, with all trends expected to see further decline in Q3.

Recovery Forecasts

The pace and scale of the recovery for the construction sector will be directly influenced by the wider economy which in turn will be affected by many factors. [Scottish Government economic analysis](#) of June 2020 modelled different recovery scenarios including a potential second wave of COVID-19 through to the impact of Brexit at different times with or without a trade deal.

Figure 1:
 Illustrative Scenarios of Possible Macroeconomic Paths of the Scottish Economy with a Free Trade Agreement Brexit Outcome at the End of 2020 or the End of 2022



Across the scenarios considered, modelling suggests that the economy may recover to pre COVID-19 levels at the earliest during Q1 2023 through to a recovery not yet being achieved by 2026.

The construction industry has historically shown a high level of cyclicity, amplifying that of the general economy as shown for Scotland since before the global financial crisis below:

Figure 2:
Scotland GDP & Scotland Construction GDP



The data suggests that the negative forecast for the wider economy in the medium term is likely to be magnified within the construction sector and there are a number of uncertainties around how badly the economy and subsequently the construction sector will be effected. This recovery plan has been developed to be dynamic and respond to the uncertainties ahead. Where required, the priorities and range of activities will be adjusted to best support the needs of the industry going forward.

Covid-19 Response

As a response to the pandemic, the Forum has been temporarily re-purposed as a Covid-19 Industry Re-Start and Recovery Forum to build on the collective leadership approach and level of joint working that has been developed through the existing collaboration. The [Minister for Local Government, Housing and Planning](#) has chaired the reconstituted Forum for this activity and it has been joined by a broader range of representatives¹ with an interest in the health and success of the construction industry in Scotland. In addition to a wide range of construction and construction related businesses, the Forum's membership also includes representatives from trade and professional bodies, trade unions, and other Scottish public sector organisations. It has met at least every two weeks since April with a specific focus to develop and implement a plan to successfully restart the construction industry in Scotland and to develop a Recovery Plan. The joint working between business and government aligns with recommendations of the [Advisory Group on Economic Recovery](#) and represents a significant advance in collaborative working arrangements.

¹ [Links to participants page](#)

Covid-19 Construction Industry Restart

The Re-start & Recovery Forum has coordinated collaborative work on the Construction Industry's [Phased Re-start plan](#) and the associated [Site Operating Guidance](#) which supported a restart of site-based construction activity in line with the Scottish Government's [Route Map Through and Out of the Crisis](#). The level of collaborative working, including rapid co-design, consultation and communication of working practices to support industry restart was unprecedented. It incorporated business leaders, professional and trade bodies, trades unions and Government and provides a sound platform to move through recovery and into transformation with a shared agenda and established ways of working which have been proven to be able to deliver meaningful results quickly.

Progress has been made through restart and the industry has moved to phase 5, the final phase of the restart plan.

Construction Industry Recovery Plan

The Restart & Recovery Forum has now turned its attention to recovery planning for the construction industry in Scotland to help the industry [Rebuild Better](#).

This draft recovery plan establishes a shared view across government, industry and trade unions of the short term response to Covid-19 and sets out the pathway between this and the longer term transformation required to build a stronger, fairer and greener economic future for Scotland. We have a shared vision of a safe, productive, profitable, digitally-enabled, low-carbon, and socially responsible construction industry which offers quality jobs and fair work to a highly skilled and diverse workforce and a quality and life-time value product to its customers.

The longer-term transformation aims for the industry are consistent with Scotland's [National Performance Framework](#) and [climate commitments](#) but are being progressed in a highly uncertain environment where many industry participants at all levels have suffered financial losses and are fearful for their businesses and livelihoods in the short term. While it is agreed that long term transformation is necessary, it is recognised that a range of short-term actions are critical. The recovery plan will therefore focus on the immediate and short term. Where agreed actions can be progressed immediately, they will be, using the most appropriate means. Some of the actions will build on work already underway in several arenas, which can be directed towards the recovery effort.

Construction Industry Demand

Throughout the process of developing a joint Industry Recovery Plan it has been clear from the industry that its most immediate need is for its clients across the public, private and domestic sectors to continue to buy its products and services. Businesses are facing substantial income shortfalls from the period where the majority of site-based activity was suspended, and many remain at lower productivity levels meaning that the value earned on each project every month is lower than normal. A greater number of projects therefore need to be in design development and construction to support the totality of the industry's productive capacity and employment. The industry has made a wide range of suggestions to assist with the development of a healthier pipeline position and has also provided many ideas and recommendations to remove some of the barriers and blockages that cause unintended delay for projects already in the system. It is our intention to further review these proposals.

The Construction Industry Statistics section evidences the contribution the sector makes to both economic activity and employment in Scotland, and its position at the heart of meeting Scotland's long-term challenge of achieving net-zero emissions of all greenhouse gases by 2045. Continued investment is critical by the public sector in both new infrastructure and the repurposing, retrofitting and maintenance of existing assets to support an inclusive and green recovery. The Forum understands that the Government will shortly publish its Infrastructure Investment Plan, covering the next 5 years of public investment. This will help to provide visibility of the Government's investment priorities and planned infrastructure projects and programmes. Private sector development and investment in both new and existing assets is equally important for construction industry pipeline and is encouraged through a strong economic and policy response. Many of Scotland's construction industry SMEs work directly for householders and rely on their ability and incentive to maintain and improve their homes. Creating demand relies on decision making by clients and investors across the public, private and domestic sectors. The joint working of this Recovery Action Plan can inform development of those plans and seek to maximise their benefit for the Construction Industry in Scotland.

Action Plan

The Restart & Recovery Forum has identified five themed areas for concerted and collaborative efforts over the coming months and has established Sub-Groups² to develop and progress actions plans. These Groups and joint Action Plans are set out below

Pipeline & Commercials

The most immediate need is for a clear pipeline of work, brought to market quickly and efficiently on fair commercial terms which reflect the reality of the Covid-19 environment. In the anticipated economic environment under-pricing of construction work and unfair treatment of supply chains is a significant risk to short term industry recovery, medium term sector sustainability, and ultimately the longer-term existence of a Scottish based delivery capability. Alongside this price led approaches can impact on client value, quality of product, and successful project delivery. Building on [current best practices](#) these can, and should, be avoided through sustainable procurement practices and responsible industry behaviour. Over the longer term, action must be taken to transform the commercial relationship between clients (public and private), their contractors, supply chains and advisors to deliver transformative improvement in productivity and outcomes for businesses, clients and workers across Scotland. [View Action Plan](#)

Skills & Workforce

The most immediate need is to support employment, fairness of work and those who may become unemployed through what will be a difficult period. A particular focus is needed on the younger workforce. Getting apprentices back into work and learning, supporting their continued employment and development must be a key sector priority, alongside maintaining opportunities for graduates in the industry and encouraging new entrants from diverse backgrounds to consider construction as a career of choice. In the medium term, embedding a fair work culture and upskilling the workforce for a digitalised industry and the range and scale of design, manufacture, construction, and maintenance activities required to deliver a decarbonised built environment is the major challenge. More flexible

learning will be required to support upskilling and reskilling for those moving into different sectors and leadership skills can be enhanced to enable industry to drive forward the new agendas. [View Action Plan](#)

Transformation

The most immediate need is to transform working practices to maintain and enhance worker safety whilst enabling productivity in the Covid-19 working environment. A focus on digitisation, and especially supporting SMEs to embrace digital ways of working in the short term will be important to maximise the whole-life benefits of these technologies and minimise any digital divide in the industry. A renewed focus on construction quality, including regulatory compliance, will improve life-cycle value to clients and productivity of the industry.

Over the medium term further strategic change should seek to fully digitalise and embrace more manufactured assemblies and complete assets, reducing on-site work whilst maximising local value-add. As well as resetting the roles of key players and construction delivery approaches towards a more whole-life, outcomes focussed and more efficient and effective process. The grand challenge of decarbonising Scotland's built environment will be central to the industry's workload over the coming decades. Wide-ranging changes will be needed across the industry to prepare for the new decarbonisation workload, constructing and refurbishing net-zero assets in a resource efficient way.

It has been recognised that the circumstances arising from the pandemic has hastened the change in some elements of the way we work. It has seen unprecedented levels of collaboration between government and industry and within those spheres themselves, as well as the development of solutions to ways of working together that we can now seek to build on. [View Action Plan](#)

Supply Chain Resilience & Capability

The most immediate need throughout the supply chain is for confidence building through clear pipelines of investment in both new build and refurbishment of existing assets, and measures to encourage development and activity. Actions on fast tracking opportunities for SMEs have been explored and ideas to stimulate private sector demand, particularly in relation to regeneration of town centres, change of use and brownfield regeneration have been generated. Further investment into affordable and mid-market rent housing has been identified as being an ideal route to helping the industry recover at pace while delivering social outcomes, and investor appetite for this asset class remains strong. In addition, incentivising energy efficiency investment and the use of low embodied carbon materials would build confidence in shaping the supply chain to meet the future capacity and skills needed to decarbonise the built environment. Further work is required to map the wider Scottish construction supply chain from primary materials, including timber and quarry products, through manufacturing, supply and distribution to site-based general, specialist and trade sub-contractors along with the intrinsically linked professions and advisors. Medium term actions will seek to build further resilience across that chain and demonstrate approaches to asset specification and delivery which promote supply-chain development and maximise local economic and community benefits. [View Action Plan](#)

Industry Data & Insight

The most immediate need is for clearer construction pipeline information, better data sets to understand the broad and deep Scottish construction and related sectors in the context of the whole economy and to provide a framework for the collation and dissemination of industry-wide data sets which can inform industry decision making, investment and policy making. In the medium-term a more coherent approach to collaborative industry data management and the provision of a real-time industry data dashboard will further enhance decision making across the sector. [View Action Plan](#)

Next Steps

This Scottish Construction Industry Recovery Plan will be developed as a website so that it can remain a living document with actions added and tracked through time by the Forum and the website updated accordingly. The sub-groups working on the themes identified have made much progress in a short space of time and have developed more detailed thoughts to take forward the actions summarised. The Forum wishes to express its thanks to all of the sub-group members and its hope that they will carry on to drive implementation of the Plan.

Consultation

Feedback and comments from industry participants and stakeholders on the content and actions set out in this draft plan are welcomed. An initial period for consultation on the Plan will run to 15 September with any comments made by then considered by the relevant sub-group of the Forum for incorporation in a finalised plan targeting publication in early October. Comments should be sent via email to enquiries@constructionforum.scot

Implementation

During September, the Forum will finalised governance and working arrangements for the implementation of the plan and publish these in the finalised version. It is anticipated that these will include a tracker to monitor progress against actions and an ongoing ability via the website to add comments and suggestions during the implementation phase. Based on comments and feedback received it may be that new areas of collaborative activity are developed which require new groups to be constituted, or the work of the groups may be re-focussed or expanded within available resources.

Action Plan

Work Stream	Immediate (Achieved by September 2020)	Short (Achieved by December 2020)	Medium (Achieved by December 2021)	Long (2022 and beyond)
Time scales indicate priority and targets but are not prescriptive				
Pipeline & Commercial	<p>For recovery purposes – establish a presumption for quick quote, framework, and restricted procedures.</p> <p>Achieved</p> <p>Issue clarification that “30-day payment” should never over-ride shorter payment cycles in standard contracts.</p> <p>Achieved</p> <p>Develop / identify indicators to track (public and private) projects coming on stream.</p>	<p>Finalise and publish an alternative tender price appraisal tool and issue updated guidance on quality evaluation and Abnormally Low Tenders</p> <p>Finalise joint development of a Scottish Civil Engineering framework incorporating the leading practices from all work streams set out in this document.</p> <p>Focus on immediate operational cashflow through the “supply chain” – main contractors, consultants, sub-contractors, material suppliers.</p> <p>Agree next practical steps to deliver pipeline & commercial improvements.</p> <p>Develop outline proposal for a forecast construction pipeline database extending to wider public sector</p> <p>Agree future approach to shut-down requests.</p> <p>Gather evidence of agreed COVID costs for on-going benchmarking</p> <p>Engage with Scottish Government on the Infrastructure Investment Plan Pipeline to maximise local industry benefit</p>	<p>Consult and collaborate with industry on the requirement for a sustainable assurance method for contractor performance.</p> <p>Develop guidance and training material on risk allocation and transfer for public and private sector clients.</p> <p>Establish route to transform pipeline and commercial practices and start implementation.</p> <p>Development of a Scottish Building framework or equivalent procurement vehicle for building work, incorporating the leading practices from all work streams set out in this document</p>	<p>Sustainable assurance method for contractor performance in place. Complete transformation in pipeline and commercial engagement</p> <p>Embed and monitor sustainable performance assurance and payment practices to address industry-wide issues with retention and payment terms</p>

Work Stream	Immediate (Achieved by September 2020)	Short (Achieved by December 2020)	Medium (Achieved by December 2021)	Long (2022 and beyond)
Time scales indicate priority and targets but are not prescriptive				
Skills and Workforce	<p>Maximise support for employers and employees who are facing redundancies. Signpost to available support such as PACE, Adopt an Apprentice and the Construction Retention Talent Scheme.</p> <p>Look at establishing a database of redundant apprentices and opportunities for funded short course upskilling provision for those that have been made redundant</p> <p>Work to retain current and future apprentice talent pipeline:</p> <ol style="list-style-type: none"> 1. Addressing backlog of Skills Test for construction apprentices 2. Maximising 2020 take-up 3. Supporting redundant apprentices to access new opportunities 4. Develop an industry backed pre-apprentice route Understand and identify FE capacity this year, given the need for physical distancing and blended learning <p>Raise awareness of digital skills training and support available to employers and employees</p>	<p>Maximise Government & Agency / Industry engagement around Fair Work, IT poverty & access (apprentices) and financial support for skills and employment both for new entrants and to upskill and retain existing workforce.</p> <p>Create an Industry wide best practice communication plan covering employers, employees and the supply chain. Ensure industry aware of all available support, guidance as well as sharing of good practice.</p> <p>Ensure plans are in place for any second wave, including localised lockdowns, focus on Apprentices (Incl Graduate), improved engagement with workforce and access to any available support schemes</p> <p>Ensure Industry needs are represented around funded workforce and skills initiatives</p> <p>Continue to promote blended / remote learning and assessment across all construction apprenticeships ensuring digital accessibility.</p>	<p>Support industry through next stage of Brexit including the implications of immigration requirements and monitoring of impact on employment</p> <p>Investigate viability of introducing compulsory registration for apprentices that links to employment T&C's.</p> <p>Investigate viability of restoration of partnership agreements for construction craft qualifications.</p> <p>Work with employers to promote the apprenticeship route, particularly in areas with high demand from young people.</p> <p>Work with skills groups to gather employer and apprentice views, review and adapt existing apprenticeships, qualifications, training and assessment to ensure fit for purpose and identify any skills gaps.</p> <p>Develop and embed an industry wide approach to school engagement and career promotion, including resources that showcase pathways into and through the industry across all professions.</p>	<p>Develop a competency framework that includes a focus on digital skills, meta-skills, management and leadership skills in addition to technical skills and competencies.</p> <p>Create a system to track and monitor Industry CPD e.g. Construction Skills Passport where not already available</p> <p>Create an online National Construction Skills Academy, with the development of regional training hubs for face to face learning. Including training linked to low carbon, digital skills and high-quality management training and signposting to existing training resources</p> <p>Look at approach to encourage direct employment and embed all principles of Fair Work across sector - focus both in development of business strategies and incentives through procurement</p> <p>Use technology to its potential within workforce planning. This should focus on both demand and supply of skills</p>

Work Stream	Immediate (Achieved by September 2020)	Short (Achieved by December 2020)	Medium (Achieved by December 2021)	Long (2022 and beyond)
Time scales indicate priority and targets but are not prescriptive				
Skills and Workforce (continued)		<p>Investigate the viability and desirability of shared apprenticeship schemes</p> <p>Engage with SDS and FE and HE sector to ensure that there are clear routes into the sector from existing construction training and skills courses.</p> <p>Identify best practice to support young construction professionals as they enter and develop in the industry.</p> <p>Map cross industry activities around skills and training, to aid sharing of good practice and collaboration and minimise duplication.</p> <p>Look at how to support and embed existing Fair Work principles across Industry.</p> <p>Develop employment support initiatives to prepare for Brexit</p>	<p>Stimulate industry investment in high-impact upskilling opportunities aligned with green recovery plans and building meaningful digital skills.</p> <p>Support development of online CPD courses for professions to focus on future skills.</p> <p>Develop CPD for college lecturers and others involved in construction training to maintain awareness of innovation, change and future skills needs</p> <p>Work with industry and sector skills bodies to ensure that Scottish qualification and training needs are fully reflected.</p> <p>Review collective bargaining</p> <p>Consider a fair work charter for construction sector following publication of the Fair Work Convention report</p> <p>Begin development of a national programme to support industry to improve diversity and inclusion including positive action and financial support.</p>	

Work Stream	Immediate (Achieved by September 2020)	Short (Achieved by December 2020)	Medium (Achieved by December 2021)	Long (2022 and beyond)
Time scales indicate priority and targets but are not prescriptive				
Skills and Workforce (continued)			<p>Create a professional Human Resources and Learning & Development group, responsible for gathering real-time data for both industry and Government supporting development of sector focussed courses and leading on diversity, inclusion and Fair Work</p> <p>Consider a cross construction industry mental health initiative</p>	

Work Stream	Immediate (Achieved by September 2020)	Short (Achieved by December 2020)	Medium (Achieved by December 2021)	Long (2022 and beyond)
Time scales indicate priority and targets but are not prescriptive				
Transformation	<p>New ways of working for managing infection control health & safety.</p> <p>Achieved</p> <p>Digital improvements in Building Standards, e.g. e-Building Standards, Remote Verification, and promotion of Certification approaches.</p> <p>Achieved</p>	<p>Review / develop outline digital strategy for industry – notably SMEs</p> <p>Extend reach of the Transforming the Value of Consultancy initiative and develop outcomes-based approaches</p> <p>Gather and disseminate lessons from construction quality improvement initiatives and issue guidance on maintaining focus on construction quality and regulatory compliance during economic downturn.</p>	<p>Develop a construction business facing Technology Navigator.</p> <p>Establish the infrastructure to take forward and accelerate the work of the Construction Quality Improvement Collaborative.</p> <p>Establish route to develop alternative working methods for the industry including manufacturing approaches and off-site production</p> <p>Build on existing work to prepare the industry to deliver a net-zero carbon built environment</p>	<p>Complete transformation of the industry in response to the well-being economic recovery</p>

Work Stream	Immediate (Achieved by September 2020)	Short (Achieved by December 2020)	Medium (Achieved by December 2021)	Long (2022 and beyond)
Time scales indicate priority and targets but are not prescriptive				
Supply Chain Resilience & Capability	<p>Promote removal of VAT from restoration, repair and retrofit work.</p> <p>Continue to develop an on-line construction directory, take forward supply chain analysis, capability mapping and case studies including needs for long-term net-zero transition and potential for local content</p>	<p>Build upon the suggested routes to improving the pipeline of opportunities for the supply chain and promote these ideas more widely.</p> <p>Develop understanding of supply chain needs for long-term net-zero investment in building and wider infrastructure to maximise local input</p> <p>Develop case-studies (public and private projects) on maximised local value-add by building / project types</p> <p>Encourage increased use of local, sustainable and recycled materials to minimise embodied carbon including promotion of indigenous supply chain particularly timber and recycled materials and consideration of the potential for specifying minimum content of sustainable natural materials or recycled materials in new public buildings</p> <p>Analyse Brexit impacts for construction products supply and develop response options to enhance supply chain resilience</p>	<p>Support supply chain development in Scotland (e.g. building energy efficiency, offsite construction, infrastructure) and promote opportunities for industry development</p> <p>Promote use of local materials and expertise to the domestic and wider market</p>	<p>Embed low embedded carbon materials as a central feature of life-cycle net-zero assets</p> <p>Prioritise local supply chains to support a whole life net zero sector</p> <p>Develop clusters including for timber products and recycled materials and seek exporting / development opportunities</p>

Work Stream	Immediate (Achieved by September 2020)	Short (Achieved by December 2020)	Medium (Achieved by December 2021)	Long (2022 and beyond)
Time scales indicate priority and targets but are not prescriptive				
Industry Data & Insight	<p>Develop a data framework for project pipeline communication.</p> <p>Create data and intelligence portal for the hosting of industry evidence and data to support the recovery plan.</p> <p>Achieved</p> <p>Assemble evidence base on economic impact of Scottish construction industry</p>	<p>Start development of an industry monitoring data dashboard with high-level metrics upon which to track the construction sector's health and improvement in defined areas.</p>	<p>Develop a construction sector data strategy</p> <p>Publish and maintain industry monitoring data dashboard</p>	<p>Embed sustainable data management approach to maintain actionable insight for the industry and support industry objectives.</p>

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Industry Recovery Plan

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- Tony Elliot, CECA, SAAB, Robertson Group
- Jim Young, ICE
- Ian Rogers, SDF, SPADAC, SCORE, CFM
- Neil Rogers, SDF
- Paul Mitchell, SBF
- Iain Hughes, CITB
- Steven Dillon, Unite the Union
- Douglas Morrison, CSIC
- Elaine Ellis, SDS
- Allan Whyte, Scottish Heads of Property
- Gordon Nelson, Federation of Master Builders.
- Karen Stevenson, RIAS
- Jackie Archer, Belfour Beatty
- Mark Bramley, Pat Munro
- Fiona Harper, SELECT, SECTT
- Rebecca Crossland BESA
- Saffron Grant, Digital Construction Skills
- Linzi Shearer, Cala Group
- Lesley Laid, Equate
- Scott McGibbon, Pivitol Consultancy
- Lisa Deane, CSIC
- Grahame Barn, CECA Scotland
- Tam Kirby, Unite the Union
- Jim Brown, ESP
- Lesley Laird, Equate Scotland
- Elyse McBride, T Clarke
- Nicole McCann CSIC

Transformation Sub-Group

- Ron Fraser, Construction Scotland (Co-Chair)
- Colin Proctor, Scottish Futures Trust (Co-Chair)
- Colin Campbell, Scottish Futures Trust
- Paul Dodd, Scottish Futures Trust
- Stephen Good, Construction Scotland Innovation Centre
- Douglas Morrison, Construction Scotland Innovation Centre
- Graham Porteous, Scottish Government
- Ian Gilzean, Scottish Government
- Mark Turley, Scottish Government
- Stephen Garvin, Scottish Government
- Dave Forrester, SELECT
- Ian Honeyman, Scottish Building Federation
- Mark Arthur, ACE/Hurley Palmer Flatt
- Stewart Macartney, IStructE/Blyth and Blyth
- Patrick Brown, City of Edinburgh Council
- Alasdair Burt, George Leslie Ltd/CECA
- Iain Kent, Morgan Sindall/BuildUK
- Jim Young, CHAP Construction/ICE
- Karen Stevenson, RIAS
- Paul Lowe, FES
- Martyn Raine, SNIPEF
- Scott Mackenzie, North Ayrshire Council

Industry Recovery Plan (continued)

Supply Chain Resilience & Capability

Sub-Group

- Dermot Rhatigan, Scottish Government (Co-Chair)
- Andrew Richards, SafeDem (Co-Chair)
- Alan Wilson, SELECT
- Andrew Gillon, Solway Precast
- Bob Leishman, Tough Construction
- Colin Fraser, Pinsent Masons
- David Ross, Keppie Design
- Irene Wilson, Robertson Group
- Jackie Mackintosh, Wheatley Group
- John Edwards, PMP
- Stephen Boyle, Zero Waste Scotland
- John Forster, Forster Group
- Ken Munro, Superglass
- Margaret Watson, Scottish Enterprise
- Paul Lowe, FES
- Stephen Mann, Scottish Government
- Sharon Miller, Scottish Government
- Gary Gibb, Miller Fabrication
- John Campbell, Walker Timber
- N Penny, Savills
- K Reid, Cruden Investments
- Stephen Good, CSIC
- Simon Goodson, Goodsons Engineers
- Stephen Slessor, Morrison Construction
- Stewart Lynes, Miller Homes
- Steven Hutcheon, Highlands & Island Enterprise

Data Sub-Group

- Paul Dodd, Scottish Futures Trust (Co-Chair)
- Stephen Good, CSIC (Co-Chair)
- Sharon Miller, Scottish Government
- Margret Watson, Scottish Enterprise
- Sean Murchie, Scottish Government