



GCS ASSOCIATES
SPECIALIST RECRUITMENT

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**WAYS THAT THE
CORONAVIRUS
OUTBREAK IS
SHAKING UP OUR
CONSTRUCTION
INDUSTRY**

Introduction

There is no denying that Covid-19 has left our construction industry facing unparalleled disruption. The continually changing situation and shifting guidance has left us scurrying to protect our staff, whilst keeping business functioning.

Unusual times demand unusual responses and we are particularly proud of the ways our industry has found new ways to collaborate and thrive in highly difficult circumstances. We truly are all in this together. It is as the BMF CEO John Newcomb stated in a recent interview that our “industry has truly stepped up to the plate in a time of crisis”. As part of the Construction Leadership Council’s Covid-19 Task force, Newcomb has been having daily meetings with the government, ensuring that all our industry’s “feedback is reaching the key ministers”. It seems clear that in these trying times, the construction sector is well and truly on the frontline of Britain’s economic response.



John Newcomb, CEO of the BMF

“Our industry has truly stepped up to the plate in a time of crisis”.

1 SUPPLY CHAIN DISRUPTION

The importance of the supply chain in the early days in keeping the wheels of construction and the local economy turning cannot be underestimated. Back in April, consultancy firm Arcadis identified supply chain capacity as the largest risk to the construction sector following the Covid-19 crisis. David Young, CEO of Bradfords Group Ltd, predicted "seismic changes in supply chain logistics following Covid-19" on a call with GCS last month. Indeed, as sites begin to reopen, issues concerning the movement of materials and the sourcing of labour urgently need to be addressed before the market can properly stabilise. Construction projects depend on the smooth operation of chains of supply - just one disturbance in that chain can disrupt the whole of an operation. However, the extent of this disruption is yet to be fully assessed and, as such, there is still a considerable amount of uncertainty.

In order to tackle this issue, John Newcomb has been chairing meetings with Merchants, Manufacturers, Tier 1 Contractors and Housebuilders in recent weeks. Newcomb states that the purpose of these meetings is "to get a broader picture of current operating levels, plans underway to reopen construction sites and to discuss what needs to be in place for the capacity to increase. One element here, of course, is the availability of materials". Newcomb spoke about the government's focus on construction's long-term recovery plan, highlighting the government's appreciation that contractors and suppliers are an essential part of our UK economy.

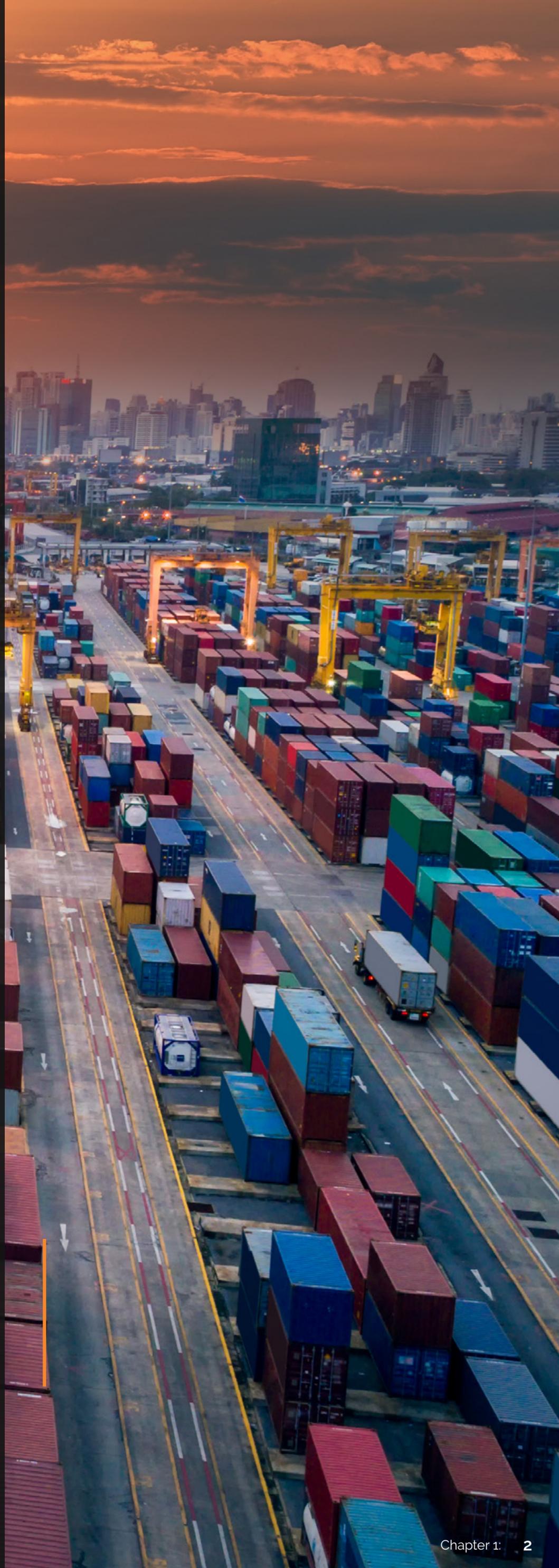


Allan Durning, one of 'the' influential leaders within the construction supply chain, is a much respected and senior figure. With over 30 years' experience within the Building Materials industry, Allan is a proven Director & CEO, with extensive board level experience for major PLC organisations and is currently working in a consultancy capacity for H&B Buying Group. Allan spoke to GCS back in mid-April. Although Durning underlined that improvements were non-essential, he did outline how essential it was that repairs and maintenance (RMI) remained a key component of the fight against Covid-19: "We have stopped. Buildings carry on". The RMI was actually recently highlighted as one of the 4 key sectors within construction in the CLC's recent 'Roadmap to Recovery'.

Regarding the early debate on whether merchants should have opened or closed, Durning acknowledged that there is "no one way" of dealing with the situations and this decision was dependent on individual corporate structures. He felt that some sites being "open in a managed way" were a key way of supporting our economy in a time of crisis. Durning said one of the real challenges facing building management was that sites are not uniform - so they can't easily marshal vans in and out without causing chaos. Durning also notes that some sites like JTD Building Supplies and Bradford Building Supplies have remained in operation by using a big car park, having people on the gates and utilising proper PPE.

Both Bradfords and JTD made the difficult decision to remain operational back in March and changed its operational structure in record time to do so - prioritising safety measures to keep customers safe. Managing Director of JTD Building Supplies, Tony Sharkey, explained to us that JTD were one of "the lucky ones" who already had the right kind of premises to implement social distancing; "we've been open throughout". Both JTD and Bradfords were initially only serving local and essential workers, but are now operating deliveries and arranged branch collection services to all customers. All of this has been in accordance with government safety recommendations. Such efforts, despite some real criticism, have been a lifeline for local tradespeople and is a reason the UK government has paid tribute to our industry for its "hugely valued and critical contribution" during this crisis. Bradford's CEO, David Young, said: "We've been trusted by the trades since 1770, and we're not about to stop now". Bradfords actually launched a campaign in May to help its customers continue to work during these trying times, called "We've Got Your Back". David Young has reported that during the pandemic, Bradfords has been working alongside housing associations to provide essential work on frontline projects.

According to a recent article in the New Civil Engineer, the Arcadis report recommended an 8-point plan to tackle supply chain disruption which included "tactical scenario planning, the rescheduling work and reviewing relevant contract clauses to help mitigate short term risk". Also according to the report, "strong relationships with suppliers" is one of the key ways that backlogs will be unclogged post Covid-19.





As lockdown restrictions begin to ease, contracting and supply chain demand will be increased and there is some anxiety about how much catch up work there will be to do at speed. When speaking to a Project Director from a social housing provider responsible for the provision of 200 new homes and working to a specific deadline, he explained how he was worried not only by the delays already encountered but also by the availability of materials. A Branch Manager of Lords Building Merchants, also expressed anxieties about the supply chain when things get going again, saying "It will go 100 mph but who will have the stock and means to supply?".

David Young, Allan Durning and Shanker Patel, all speak of the importance of anticipating future supply chain issues. Of course, most of us are necessarily focused on the operational at present, but all three leaders encourage companies to invest in supply chains before another unforeseeable event takes place. All three men allude to a sort of supply chain risk management, calling for more diverse supply chains, better product development and a focus on real business strategy and technology - new approaches and processes are the common theme here. This is about reevaluating processes and making some key changes.

Speaking to GCS, Doyle and Whitley - a Construction company based in Cornwall, gave a valuable insight into supply chain issues from a contractor's point of view . Back in May they said that they had been finding the cap on quantities difficult to deal with, and that there were still "many products unavailable" because their work is still classified as non-essential. They also expressed concern that once these materials were available again, "the cost of them will go up" affecting profit margins on fixed price work that has already started.

As stalled projects are slowly reprioritized, we are yet to fully understand the impact of increasing demand. Even if the supply chain manages to hold its nerve, there is still much that waits to be seen.

COVID-19 MARKET DISRUPTION HAS MEANT DIGITAL OPPORTUNITIES AND OPERATIONAL CHANGE

Covid-19's immense disruption is, however, creating some opportunities for our sector to adopt new and better practices. Our task, as an industry, is to identify and nurture those practices as the immediate danger of the virus retreats. This opportunity emerges in the form of operational changes, change in sales practices, remote communication (both internal and client communication), less need to travel 100s of miles for meetings and the merging importance of e-commerce.



Allan Durning

"The more astute ones, that have invested in e-commerce and click and collect, can organise a service in a time of disruption. That is smart thinking and they've thought ahead of the game".



Digital opportunities

Michelle Barkess, Chief Information Office at Tier 1 Contractor, Mace, stated last month that Covid-19 "has seen us adopt radically new ways of working; supported by collaboration and digital platforms that we were in the process of slowly rolling out over months." Barkess sees the possible transformation into new agile and data-driven ways of working as a real positive of this pandemic.

For Allan Durning, this pandemic has really exposed the failure of many building merchants to invest sufficiently in E-commerce - be it on their website or front end electronic trading. He said " A lot of the merchants that are shut now are shut because they can't operate click and collect. They can't operate electronically. The more astute ones, that have invested in e-commerce and click and collect, can organise a service in a time of disruption. That is smart thinking and they've thought ahead of the game".

Shanker Patel is the CEO of Lords Group Trading Ltd, a business made-up of Builders merchants, civils merchants, plumbers merchants, boiler distribution, retail and manufacturing companies, that operates over 32 sites, employs over 550 people and has an annual turnover of over £275m. Patel predicts that as the demand shock eases and we start to focus on increasing supply ahead of demand, innovation and technology will help us adjust to a new post-Covid-19 norm. Patel suggests that post-Covid-19 we will move to an uber-style delivery system where customers can track their orders ahead of time. For him, new problems need new solutions - for example, now that physical delivery signage is obsolete, Patel stresses the importance of electronic systems that use photographs as proof of delivery.

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Covid-19 has certainly seen an increasing reliance on online sales. When outlining measures that can help merchants adjust to the new ways of working, digital expert and eCommonSense founder, Andy Scothern, outlined eCommerce and remote ordering as a key part of this alignment. Customers can now order at any time of the day or night. David Young told the BMF in a recent interview that "Technology will become an even more important enabler for future growth. Our website is already used more by trade customers to manage their accounts and book collections or deliveries 24/7. In a very traditional industry, there is plenty of opportunity, but we need to think differently to unlock the potential for growth."



David Young,

CEO Bradfords Building Supplies

"Technology will become an even more important enabler for future growth"

These measures do, however, widen what we can call the 'digital divide' between those embracing technology and those left behind. In BDO's recent whitepaper "Building Products and Services" this chasm is discussed. "Already, some companies are beginning to encounter a shortage of people with digital experience. This is likely to become an acute problem as the Building Products and Services sector is not one that has routinely needed to attract IT specialists".

For some, however, this pandemic has allowed for a real exploration of their digital capabilities. Steve Skeates, Commercial Manager of Riwal UK, describes how video calls have now become the "new order of the day". He sees the main positive of this pandemic as the opportunity to have a "real deep-dive" into Riwal's new IT systems.

Such digitisation in a Post-Covid world seems more relevant than ever, providing a competitive edge to operations, products and staff training. Steve also touched upon a transition to "virtual classrooms" for most training needs.

Andrew Harrison, CEO of Travis Perkins, Plumbing & Heating Division, and one of the most influential leaders in the merchants industry, took time to speak to GCS back in April. "This crisis has forced everyone to rethink what they are doing. Recent weeks have really opened peoples eyes to the use of video conferencing". And "the success of remote meetings demonstrates you can be efficient working remotely. We can take the best of what we've learnt and mix it in with the more traditional approach." Although there is always a need for face-to-face meetings with clients and your team, the success of remote meetings will reduce this need, reducing the operational burden. Andrew also explained that in terms of internal communication, "we are communicating more for smaller periods of time - there may be a change in the communication pattern".



Andrew Harrison, *CEO, Travis*

Perkins - Plumbing & Heating

"We are communicating more for smaller periods of time - there may be a change in the communication pattern"

For a long-time, the on-site nature of our work has meant that technology has been an afterthought. However, with Covid-19 and its various challenges, the industry may now be propelled into action. Despite its very real trials, this unique situation does present an opportunity for tangible and technical innovation.



Operational shifts

David Young was one of the first to implement operational changes to adhere to new guidelines stating “We changed it in an afternoon ... 7.00am the next day we had a new process launched across all branches”. He suggested that in reinforcing social distancing we were all having to break habits and that in order to combat this “we need to continually reinforce social distancing, it is easy to forget”. Young highlighted that in staying on top of these new shifts in the short-term we will form new long-term habits.

Patel also stated that “when we come out of this there will be a post Covid-19 norm, so let’s just introduce that tomorrow” and start to “innovate like hell”. But what to do when no one knows what to do? For Patel, the answer is to “make a process” based on “robust forecasting” and up-to-date information, meaning that we must also throw “old norms out the window”.

Pedro Torres, CEO of Riwal, a Global Powered Access company, spoke to GCS about Riwal’s creation of a companywide best practices document, to clearly state how to deal with Covid-19 in all levels of Riwal’s operational activities, in the depots, the workshops, during transportation and in customer bases etc. Torres stated that the goal was that everyone would take responsibility for their own local regulations - creating a balance of both central best practices and local finetuning. Due to his international reach, Torres was able to give us an invaluable global insight. He spoke of the Netherlands and Nordic countries, which continued operating at full speed and were consistently operational throughout this crisis. The complete lockdowns in France and Spain had brought operations down to around twenty percent at the worst of times, but business in these countries has recovered very fast after the lockdown ended. Regarding India’s operational shifts, Torres explained that because of the absolute lockdown the process has been very tough but the utilisation rates have increased week by week since then.

Allan Durning spoke of the potential for more work-from-home opportunities: “Some employers are looking at their costs and if people are working from home fairly productively they are probably thinking do we need a building this size?”



Shanker Patel,

CEO, Lords Builders Merchants

“It’s time to innovate like hell”

Could we reduce it? Could people work 3 days at home and 2 days in the office? The enlightened employers will look to see if there are changes that can be made if the paradigm can shift”. And Allan believes that paradigm is shifting “for the builders merchants to a more technological and logistical based approach to its customers. And this applies to the supplier too”.

Social distancing and therefore necessary operational changes are here to stay. In a conversation with GCS, Darren Price, Operations Manager for Lords Builders Merchants, spoke of the need to innovate and improvise at speed. Price described making huge operational overhauls that had to be implemented literally overnight. A branch manager of a London Builders Merchants explained, spoke of the need to make new operating processes under social distancing guidelines.

Andy Wright, CEO of Sunbelt Rentals UK, spoke with GCS about their operational changes at larger sites. Wright acknowledged that social distancing “will drive some changes to our operating model and some of these may last long after this pandemic”. Wright said that they employed a “rotational structure”, where their employees worked 3 weeks on and 3 weeks off, swapping around. This was a way to ensure a continued presence for their customer base, whilst also increasing social distancing and providing a safe of working for Sunbelt’s people. For Wright, the pandemic has also allowed for a-very-specific-to-Sunbelt silver lining, which only recently rebranded as one business (it was previously called A-Plant). This trying period has allowed the company to unite fully under a common threat and giving space for “a powerful evolution”.



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“The old buying model is potentially dead – collections as we knew them are likely to become a thing of the past. Adhering to the social guidelines, we are now at 30% capacity with the ‘Call & Collect’ practice, deliveries are up and thankfully our ecommerce is very strong, but it doesn’t make up for the loss of the collection trade to our business.”

Alan Betteridge, a construction specialist and management consultant at AJ Betteridge Ltd, gave a more detailed insight into what these operational innovations might actually look like, stating that there is “certainly an opportunity here for a new normal”. This echoes David Young’s sentiment that “this crisis has forced an improved organisation” forcing companies into “using this great opportunity to add improved change, remould.” Andy Wright, likewise, sees this crisis as an opportunity to add improved change, citing the “positive lasting consequences” and that “we need to embrace change moving forward”. In our conversation with Allan During in April, he predicted a change in buying behaviours: “studies show that habits start to form 10 weeks of a seismic change in behaviour. A lot of builders that would have come in as collect customers will now be ‘Click & Collect’ customers and are now comfortable with it”. And one look at Bradford’s most recent Trust Pilot reviews, reveals that customers are not only adjusting to these behaviors but finding the process pleasant and straightforward.

There has certainly been an increase in contactless ‘Click & Collect’ services across the country. These are operated outside of stores and mean that customers only travel to branches if they receive confirmation that their order is ready. Of course, these services do mean that collection times are a little longer.

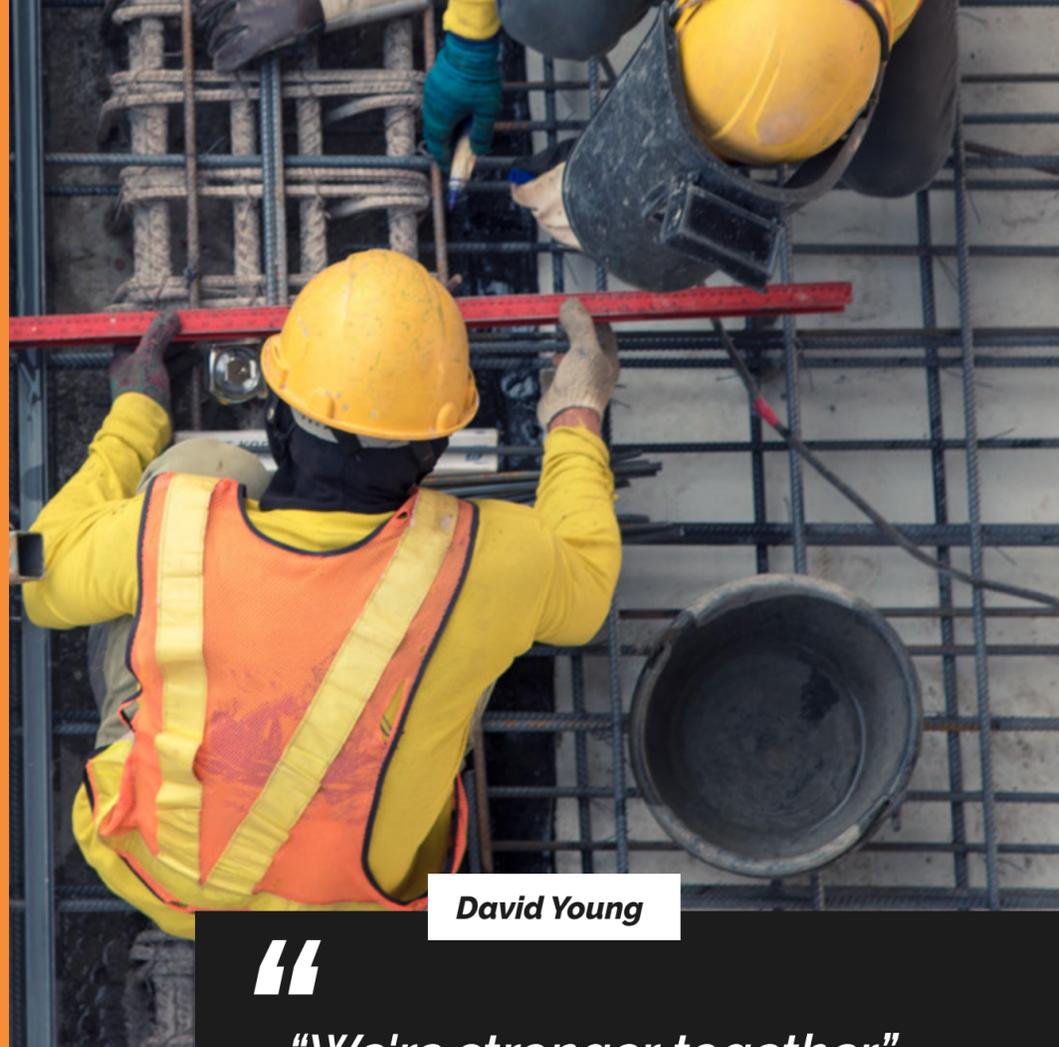
The Click or Call and Collect model is still in its infancy so time will tell how efficient or practical it is. David Young comments that the “model has advantages but it is labour intensive”. Allan Durning also raised the point that Click/Call & Collect will work better in certain sites than others, becoming more problematic in the more dense, urban areas. Something Shanker Patel echoed suggesting “The issue will be with space constraints”.

Back in April, a Regional Director for a leading Independent merchant commented that “the old buying model is potentially dead – collections as we knew them are likely to become a thing of the past. Adhering to the social guidelines, we are now at 30% capacity with the ‘Call & Collect’ practice, deliveries are up and thankfully our e-commerce is very strong, but it doesn’t make up for the loss of the collection trade to our business.” It is certainly a worrying time for many, and large question marks remain over how viable the ‘Click & Collect’ and ‘DIY sales model’ is within the world of the merchants.

3 CONSTRUCTION SECTOR UNITE FOR COMMON CAUSE

Despite initial confusion as to whether the construction sector and its supply chain should remain open, tireless efforts by the Construction Leadership Council (with the support of the BMF) have meant our industry has remained a vital cog in our nation's economy during this unprecedented time. Faced with an unprecedented disaster, the construction industry has cooperated with the government throughout, providing vital support and guidance to those in real need.

The role both the CLC and the BMF played in convincing our government to provide clear and visible support to our industry and its supply chain, during this time of Covid-19, cannot be underestimated. Their early efforts put in place measures that drastically assisted the cashflow pressures affecting all our businesses and were essential in allowing us to support a strong economic recovery. As David Young stated, "The BMF has done a superb job. I can't speak highly enough of them. Their communication has been first class and to get the Secretary of State to send that letter when I desperately needed it - they allowed us to change the mood of people". Shanker Patel went so far as to see this might have been the BMF's "finest hour".



David Young

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“We're stronger together”

There has also been internal support from those working inside the cogs of our supply chain. David Young worked tirelessly to make sure that there was transparency amongst merchants, passing on information from the BMF to smaller suppliers. He understood that independent businesses would play a vital role in getting our industry up and running again: "If we can get every merchant back, every supplier back, and get the construction sites running, we can hopefully snowball from there." It is precisely this sense of community spirit that prompted Shanker Patel to comment "David (Young) has been a pillar throughout. He innovated at pace and shared what he was doing, which can only be commended".

Merchants have also been a source of great support during this trying time, strengthening our UK economy when it most needed it. It is as Patel states that "Our industry is one of the pillars of the UK economy. Stop construction and you stop the economy." Certainly, these merchants were of great service to their customer bases, which included the core of the key worker effort- hospitals, care homes etc. Patel called these merchant decisions "based on empathy". Tony Sharkey of JTD, spoke of how they were proud to be a lifeline for local tradespeople: "We had so many people thanking us for remaining open in those early days". David Young also spoke of "construction as a motor for recovery", critically supporting local trade who "would not be earning" if merchants weren't open. He stated a few months ago that his "mantra all the way through this has been firstly; make sure everybody is safe, and [...] secondly to keep the public sector moving - NHS, Care Homes, social housing."



The role of the construction sector in supporting our NHS's efforts throughout the last few months is another key point of pride. Graham Watts, the Chief Executive of the Construction Industry Council, wrote a comment piece on May 1st describing the bravery and tenacity of our sector throughout this pandemic. Watts highlighted the construction work on medical facilities, focusing primarily on the creation of the NHS Nightingale Birmingham in just 7 days and the transformation of the Scottish Events Camp into the NHS Louisa Jordan in similar record time: "The NHS and social care workers are on the front line but if that wartime analogy is continued it is construction that is backing up these vital services, akin to the Royal Engineers, building vital logistical and infrastructural support."

Likewise, Travis Perkins, (despite closing depots to non-essential services - resulting in like for like trading figures of 25% for the period of April compared to 2019) became a key partner to the NHS during this time. In conversation with GCS, Savanna of Travis Perkins stated that they had made 34,000 disposable respirators for the NHS in Wales, 640 pairs of protective eyewear to the NHS in South West, donated PPE goggles and glasses to hospitals in Cheltenham and Lancaster and vanity units, plumbing and electrical items, plaster boards, timber and paint to new clinic rooms at St Albans Hospital.

CEO of Sunbelt Rentals UK, Andy Wright, stated that "closing our branches was never an option for us. We recognised our place as a critical service provider to the UK". Wright described that Sunbelt has been working daily with the NHS and other governmental bodies, focusing on critical production of "a range of things [...] outside construction".

Through the Covid-19 period, Sunbelt Rentals have contributed to 95% of the testing centres. For Wright, the objective was always "to keep as much of [their] network open as possible, to be there for the customer" as safely as was possible.



Andy Wright, CEO of Sunbelt Rentals UK

"Closing our branches was never an option for us. We recognised our place as a critical service provider to the UK".

David Young of Bradford's Building Supplies stresses the role of housing associations on front line projects during this crisis, providing emergency plumbing work for elderly people and freeing up critical capacity in hospitals. Young also revealed Bradfords' role in providing materials to several NHS trusts, creating temporary isolation units and extending the capacity of GP surgeries.

Perhaps, it is the culminating effect of all these efforts combined that prompted Build UK's Suzannah Nichol to say "Never before have I been so proud to represent the construction industry". Nichol goes on to state that it is precisely this ability to unite under a common cause that reinforces how "important our sector is to the economy".

These are only a few examples of some of the incredible work our sector has undertaken in the last few weeks. To account for it all would simply be too great a task. The BMF are running a campaign that will feature case studies on the website, showcasing the commitment of the construction industry to overcome this crisis. They are seeking more case studies so do contact them with your inspirational stories.

4 LOOKING AFTER STAFF

With the present skills shortage and limited workforce, the retention of staff is more a priority now than it has ever been. Now more than ever there is a need for humanity within the workplace.

Thomas & Adamson's senior partner, Alastair Wallace, wrote an article in April detailing the importance of keeping in touch with staff during lockdown: "During this time of high uncertainty, employee health and wellbeing should be viewed as a priority by every company. Additional care and support should be made available to help staff not only feel valued and supported, but also to ensure that they can handle the additional challenges that changes to their daily routine can bring".

During these unprecedented times, much of our industry's Covid-19 response is about understanding the additional pressures on individuals. Unavoidably, staff are working with unprecedented anxieties, so efforts are being made across the board to provide visible support. With the combined pressures of self-isolation, remote working, personal worries, increased workloads and a general cloud of uncertainty, what emerges as key is clear guidance communication to ensure a measured approach to the outbreak.

Bradford's Building Supplies has also focused its efforts on a different type of support by collaborating with Mental Health UK to support colleagues' wellbeing and raise vital funds at a time when employees have been continuing essential work. David Young of Bradford's states that "We are all in this together so we're doing everything we can to keep a close eye on all 740 of our staff to ensure they're staying in touch and supporting each other"



This emphasis on communication has been across the board, with a branch manager of Lords stressing the need to keep in touch with the furloughed staff. Gray states that this is a unique situation and a lot of those furloughed will be genuinely worried about having a job to go back to. Gray keeps in regular contact with every furloughed staff member, checking in every Monday morning. Gray sees this communication as vital to preserving "a passionate workforce to get stuck in on the other side. Andrew Harrison of Travis Perkins told us they have a "Check in Tuesday" where all staff furloughed can fill in a survey giving them an opportunity to express what is on their mind. Our "Check in Tuesday" goes to all colleagues, colleagues in work, those working from home and those on Furlough. It was really useful to help us keep in touch and support all three distinct groups. Andrew also mentioned the use of WhatsApp groups was a useful method of communication.

For Steve Skeates, Commercial Manager of Riwal UK, it has been critically important to reconfigure the working day, appreciating that screen time is draining and that productivity levels will invariably be lower at home. He organises a gam daily call that is used to bolster team spirit and makes sure that each meeting is no longer than 25 minutes to ensure focus. Steve Skeates stresses the importance of adopting a more empathetic approach now people are working from home, as well as balancing the need to facilitate "more breaks" for productivity.

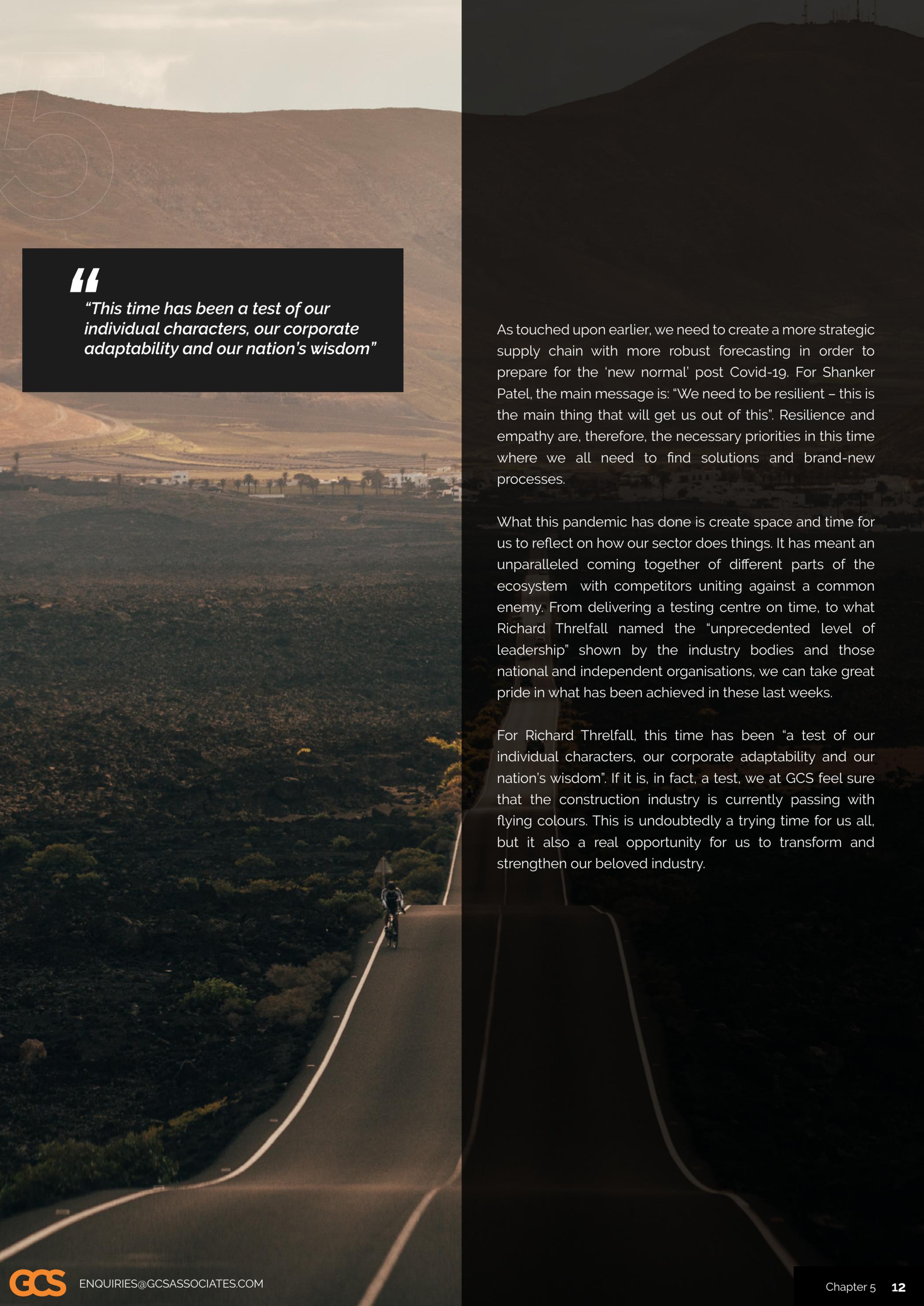
5 PREPARING FOR THE UNKNOWN AND POSSIBILITY

The CLC's recent publication of an Industry Recovery Plan for the UK Construction Sector, called "Roadmap to Recovery", has cited that our sector's recovery from Covid-19 will be gradual, with it taking two years to fully recover lost output. It also stated that costs and delivery time are likely to increase as a result of lost productivity from implementing social distancing and that this may erode low margins further, and place additional cost pressure on firms. It states that a single industry plan is needed to coordinate activity necessary for the reactivation of the whole ecosystem.

One moment signs seem positive, the next, news brings you back to reality. Having spoken to a number of merchants in recent days, trading seems to be almost back to where it should be. Positive signs but likely a 'false bubble'. It is far too early to claim confidence especially when we are hearing of large scale redundancies within our sector.

There is, of course, a real sense of the unknown still. Arcadis' report has said that despite the potential for some recovery in our sector, it may take until "at least 2022 to return to growth" in some private sector markets like house building and commercial development. As new projections emerge about how this pandemic will play out and government regulations continue to change, we need to be at the ready. Ready, as Shanker Patel would approve, to "make processes" for whatever may occur.





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“This time has been a test of our individual characters, our corporate adaptability and our nation's wisdom”

As touched upon earlier, we need to create a more strategic supply chain with more robust forecasting in order to prepare for the 'new normal' post Covid-19. For Shanker Patel, the main message is: “We need to be resilient – this is the main thing that will get us out of this”. Resilience and empathy are, therefore, the necessary priorities in this time where we all need to find solutions and brand-new processes.

What this pandemic has done is create space and time for us to reflect on how our sector does things. It has meant an unparalleled coming together of different parts of the ecosystem with competitors uniting against a common enemy. From delivering a testing centre on time, to what Richard Threlfall named the “unprecedented level of leadership” shown by the industry bodies and those national and independent organisations, we can take great pride in what has been achieved in these last weeks.

For Richard Threlfall, this time has been “a test of our individual characters, our corporate adaptability and our nation's wisdom”. If it is, in fact, a test, we at GCS feel sure that the construction industry is currently passing with flying colours. This is undoubtedly a trying time for us all, but it also a real opportunity for us to transform and strengthen our beloved industry.