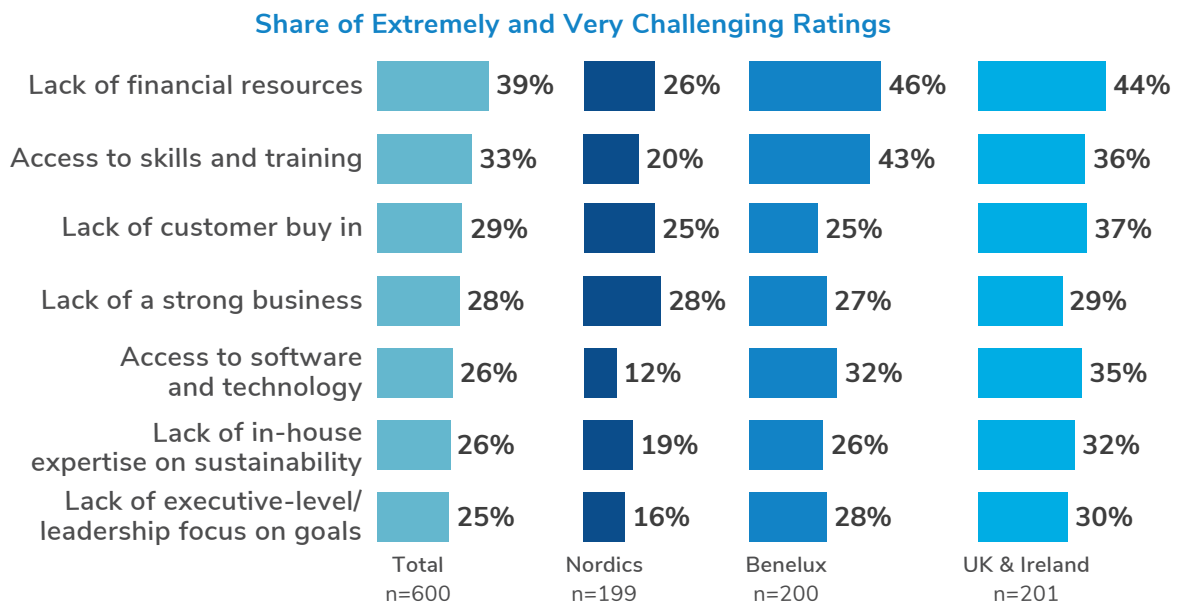


Nordics by Far the Most Mature Region in Terms of Sustainability

The Nordics emerged as the most mature regional segment ahead of Benelux, the UK and Ireland. It has the lowest level of perceived challenges, especially in financial resources and access to skills and training. These achievements reflect a long legacy of companies focusing on the environmental, social, and governance (ESG) aspects of corporate strategy and building strong capabilities and expertise in sustainability when servicing their projects and clients. Simultaneously, they have invested the much-needed upskilling and training of their employees. The maturity of digital sustainability in the Nordics is highlighted further by the region's view of access to software and technology as less of a challenge when compared to views from the other regions. Companies in the Nordics leverage software and technology to drive sustainability across the region.

Chart 7: Main Challenges for Achieving Sustainability by Region



Base: All respondents (n=600).

Q6. How challenging are the following aspects for achieving your sustainability/environmental impact goals?

Source: Frost & Sullivan

Sustainability Maturity Differs by Region in Manufacturing and AEC

Manufacturing firms in Benelux (67%) have established sustainability processes at the corporate level and build on the strong push of climate action, whereas firms in the Netherlands have focused on advancing their circular economy policy. Interestingly, A&E companies in the Nordics have a very strong corporate sustainability focus, which is rooted by a robust legacy of focus on both the environmental and social aspects of business and industry in the region. However, as a whole, AEC is stationed in the middle of its sustainability journey, with the A&E segment having progressed farther than the construction segment. This difference highlights a disconnect that needs to be addressed to effectively drive sustainability in the overall AEC industry. The A&E segment of the AEC industry does play the role of a specifier in construction projects, but lacks the controls in the final selection of materials and products in the project.