

SUPPLY CHAIN SUSTAINABILITY



Impact 2026

**Expanding Reach, Deepening
Impact: Sustainability Progress
Across the Supply Chain**

A note from our CEO

The built environment sector continues to face increasing pressure to deliver against ambitious sustainability targets, while navigating economic uncertainty and evolving regulatory requirements. In this context, the role of collaboration, knowledge sharing and accessible learning has never been more critical.

This year's findings highlight both the growing reach of the Supply Chain Sustainability School and the shifting profile of its membership. As we expand into a broader and more diverse audience, including those earlier in their sustainability journey, we see both challenges and opportunities emerge.

While some reported sustainability and business performance outcomes have declined, this report demonstrates that the School's impact on knowledge, awareness and capability building is stronger than ever. In many areas, attribution to the School has increased significantly, reinforcing its value as a critical enabler for the industry.

Looking ahead, our focus is clear: evolve our offering to meet the needs of a maturing membership while continuing to support new entrants on their sustainability journey.



Ian Heptonstall
Chief Executive Officer
Supply Chain Sustainability School

Executive Summary

Sustainability remains a top priority in the built environment, with growing regulation and reporting requirements driving supply chains to meet client expectations. The School has continued to grow, with more individuals engaging this year, reaching an impressive 51,237 people actively completing learning. With 97% of respondents preferring virtual delivery, the School is well placed to upskill the industry at scale. This year's annual impact survey gathered 1,430 responses, 46% from small or medium-sized businesses.

Metrics on sustainability, commercial and business outcomes across the membership have broadly declined

Despite the School's growth, this year's survey shows a broad decline in reported sustainability and business outcomes compared to 2025. The proportion of members measuring carbon emissions dropped 13 percentage points to 59%, community engagement fell 27 points to 36%, and improvements in Fairness, Inclusion and Respect (FIR) declined 21 points to 47%. Business performance metrics, including winning new business, improving bid quality, and reducing reputational risk, all fell by between 17 and 20 percentage points year on year.

Understanding the context behind the data

These declines should be read in context. Survey participation grew significantly, bringing in a broader and more diverse respondent base. Many of these newer participants are earlier in their sustainability journey and may not yet have embedded specific initiatives. This is reflected in the data: lower agreement is driven by more neutral responses, suggesting uncertainty rather than negative outcomes.

The School's membership is also maturing as it approaches its 15th year. Organisations that already achieved progress in prior years may not register the same incremental improvements annually. Business performance declines are also linked to wider economic pressures limiting investment.



Executive Summary contd.

The School is still having significant influence, with attribution improving in most areas

Even where overall outcomes have declined, the School's attributed impact has increased in a majority of areas, in some cases significantly. Attribution for understanding of retrofit increased 36 points and FIR attribution jumped 31 points, demonstrating the School's growing role in helping businesses develop knowledge.

The impact of the School is greater on smaller businesses

Larger organisations (250+ employees) consistently report stronger sustainability outcomes. This reflects their generally greater resource and more established sustainability functions.

Smaller organisations, however, show stronger attribution to the School across several areas including carbon measurement, waste reduction and FIR. For these businesses, the School functions as an essential resource, providing proportionally more value where in-house sustainability capacity is limited.

Members tend to attribute a greater share of sustainability and commercial impact to the School, whereas Partners, typically larger or Tier 1 organisations, are more likely to draw on sustainability initiatives from beyond the School.



The School has the strongest impact on newly joined members

Members who joined within the past year report higher School attribution across almost every category, particularly in water reduction (69% vs. 46%), waste (57% vs. 44%) and nature impact (67% vs. 57%). This suggests the School's current content is most impactful for those early in their sustainability journey.

As the membership base matures, the School must evolve beyond introductory content to offer deeper, sector and role specific learning that sustains long term impact and engagement.

Headline Insights

The Supply Chain Sustainability School's reach is growing, but reported sustainability outcomes have declined due to a broader, less mature membership base and economic pressures. Attribution to the School, however, has increased significantly, highlighting its continued value. Future success depends on evolving content to support both new entrants and more advanced organisations.



While fewer organisations report improvements to sustainability and commercial impacts, more attribute their progress to the School.



Declines are driven more by uncertainty than negative performance.



Larger organisations perform better, but smaller organisations rely more heavily on the School.

Looking Ahead: Key Takeaways

1 Move to more specialised learning
Members continue to value the accessible learning that supports those earlier in their sustainability journey. As the membership base matures, there is an increasing need to complement introductory content with more advanced and specialised learning opportunities.

2 Accessible learning remains a key strength
Members value the quality and free availability of the School's resources. The School is recognised as a trusted source of sustainability knowledge for the built environment.

3 Demand for more specific content
While the breadth of learning is valued, there is growing demand for more tailored learning, case studies and practical examples that reflect different sectors and roles across the industry.

4 Time remains a barrier to engagement
Members value the webinars, training and resources, but time constraints can limit participation. A mix of short, flexible and on-demand learning formats will support engagement.

5 Simplify the learning journey
With the expansion of topics and resources, members find it difficult to navigate the content and knowing where to start can be challenging, particularly for newer members. Clearer pathways and guided journeys will help members navigate learning more easily.

You Asked, We Delivered



Based on feedback from 2025 survey, this is how we've put your suggestions into action.



Practical Resources: Move from “why” to “how to”

1. Science Based Targets E-learning for small businesses
2. Re-development of the Scope 3 Carbon Calculator
3. Modern Slavery due diligence assessment
4. Guide to Waste Measurement and Reporting
5. Video case studies and workshops on onsite Net Zero skills



Accessibility: Learning for those onsite

1. Development of Black Hats App on Fairness, Inclusion & Respect
2. Telematics and Sustainable Consumption Onsite one pagers
3. Sustainable Site Set-up E-learning and case study videos
4. Site visits on Decarbonising Plant and Nature Recovery



Focused Training: Role, trade and sector specific learning

1. Targeted Learning Pathways: Rail sector, Wales, Waste, Nature and Social Value
2. Embedding Sustainability for Commercial Teams workshop
3. Sector-specific case studies for Retrofit
4. Climate in Procurement working group
5. 'Train the trainer' workshops and animations for educators to upskill on Net Zero



Learning for all Knowledge Levels

1. Introductory resources on Nature in the Built Environment
2. Routes into Industry videos for Future Workforce
3. Advanced content developed: Battery Report and Guidance on non-Fossil Fuel alternatives
4. Thought leadership on topics such as AI

Engagement is shifting from organisations to individuals

Over the past five years, the School's reach has expanded significantly, growing from 16,800 people in 2022 to 51,237 this year. This more diverse audience enables greater impact but requires more tailored learning approaches. Although company engagement has slightly declined, more individuals within member organisations are participating, demonstrating deeper organisational impact. Learners complete an average of five activities annually, showing strong integration. To boost engagement, the School will deepen collaboration with existing Partners to extend reach across supply chains, while prioritising growth of the Partnership base.

People



7,111
active organisations **-7% ↓**



51,237
active users **1% ↑**



1,483
bronze, silver, gold level members **5% ↑**



217
Partners **-3% ↓**

Assess



5,218
Corporate skills assessments **331% ↑**



1,303
Corporate re-assessments **-5% ↓**

12,565
Individual skills assessments **5% ↑**

4,145
Individual skills re-assessments **9% ↑**



Learn



24,164
attendees at training

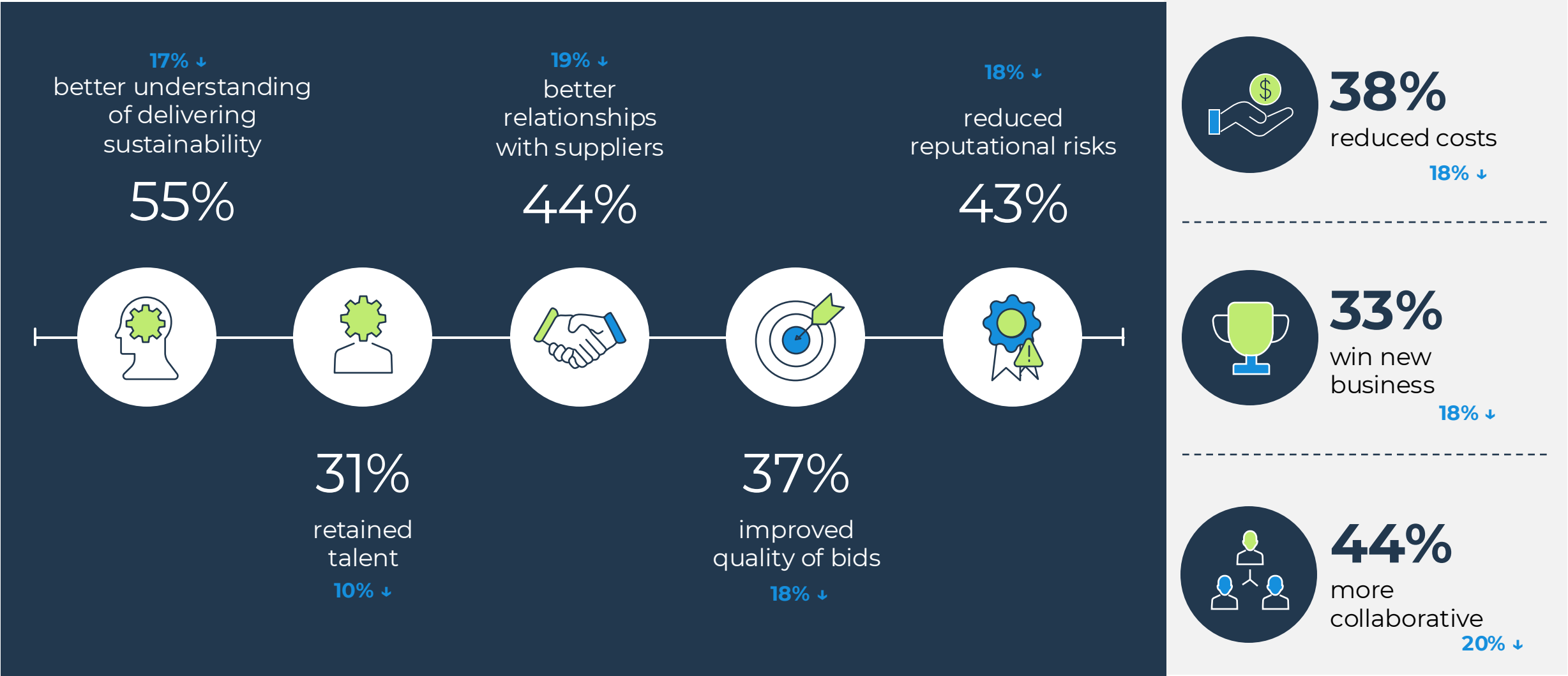


102,667
downloads of e-learning



138,936
resources accessed

Commercial impact is becoming more indirect as the School reaches a wider audience



Business impact is positive, but softening with broader reach

NEW

Engage business
leaders in
sustainability

53%



Embed
sustainability in
business
processes

55%



Embed
sustainability in
procurement
processes

47%



61%
Understand
sustainability
impacts

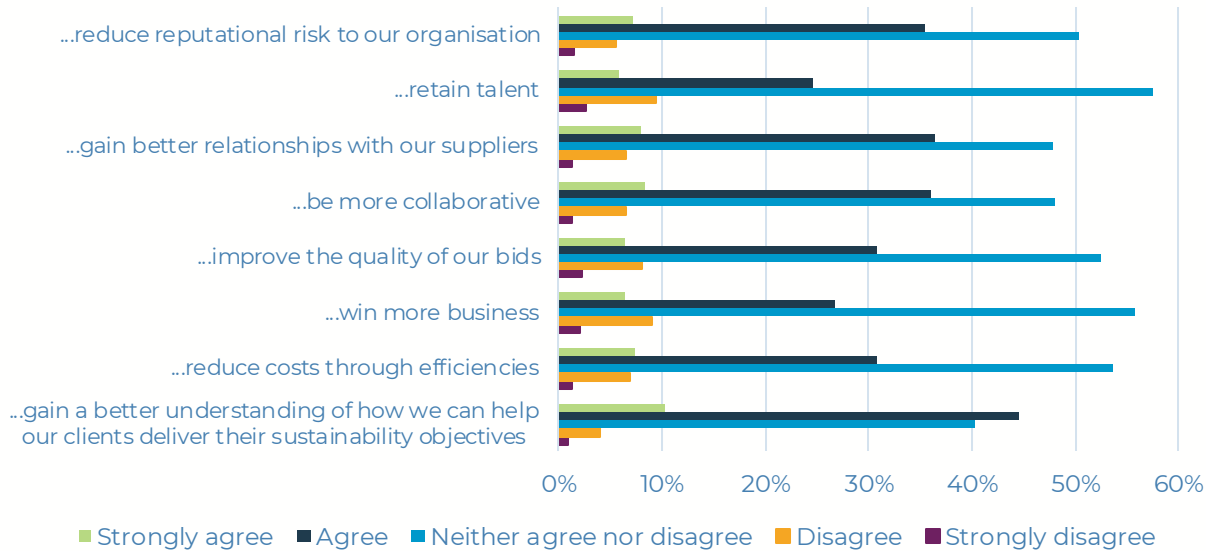


46%
Report
sustainability
impacts



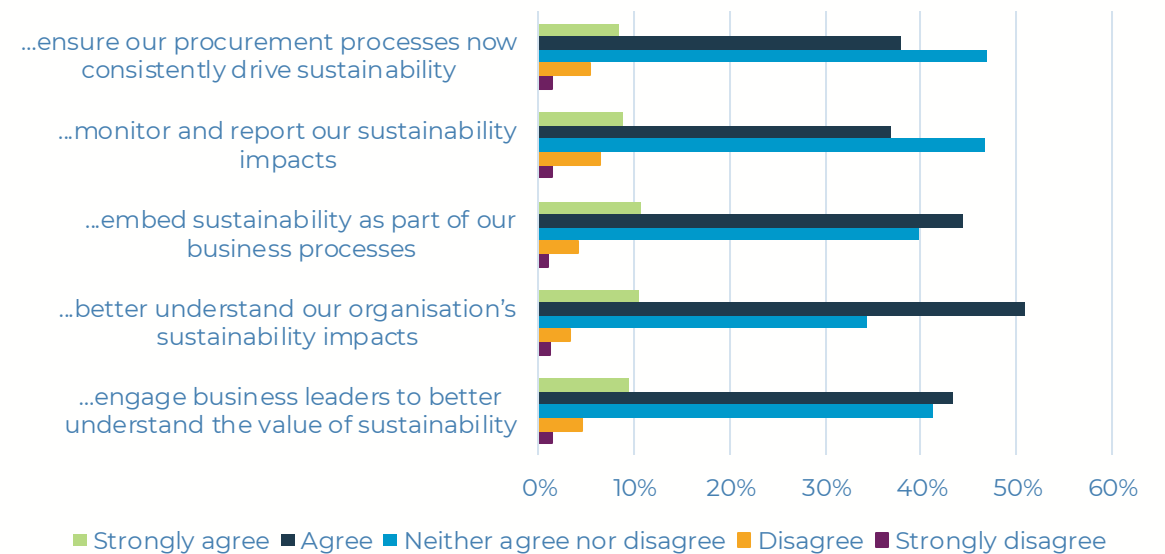
Business and Commercial Impact

Figure 1. Commercial impacts on members – 2026



- Perceived commercial impact from the School is softening, with more learners selecting “neither agree nor disagree” likely reflecting broader reach beyond those directly involved in commercial decisions.
- Tougher market conditions are making it harder for businesses to realise commercial gains from sustainability, highlighting the need to better communicate business value.
- A more diverse audience requires more tailored training, aligned to organisation size and sustainability maturity.

Figure 2. Business processes impacts on members – 2026



- Embedding sustainability into business processes is essential to sustain sector progress, especially in a tougher economic climate.
- Most learners agree the School supports embedding sustainability, understanding impacts and engaging leaders, though stronger support is needed for sustainability reporting.
- Consistent results across organisation sizes highlights the need for varied content, language and training levels.

Sustainability implementation is down but the School's influence is rising



61% -1% ↓

reduced total fuel usage & carbon emissions



59% -13% ↓

measured carbon emissions



40% -2% ↓

reported emissions publicly



50% -2% ↓

developed and implemented a Carbon Reduction Plan (CRP)



31% NEW

reduced its impact on nature

41% 1% ↑

agree the School helped achieve this

38% 2% ↑

agree the School helped achieve this

34% 5% ↑

agree the School helped achieve this

37% -2% ↓

agree the School helped achieve this

59%

agree the School helped achieve this



26% -3% ↓

improved understanding of retrofit



44% -9% ↓

reduced its total waste



20% -7% ↓

reduced its total water consumption



23% -13% ↓

improved its overall air quality control



37% -6% ↓

improved its understanding of responsible sourcing

83% 36% ↑

agree the School helped achieve this

47% 8% ↑

agree the School helped achieve this

52% 15% ↑

agree the School helped achieve this

51% 14% ↑

agree the School helped achieve this

76% 13% ↑

agree the School helped achieve this

Sustainability implementation is down but the School's influence is rising



46% -17% ↓

increased community engagement activities

51% 13% ↑

agree the School helped achieve this



31% -13% ↓

increased the number of apprentices it employs

34% 6% ↑

agree the School helped achieve this



48% -16% ↓

improved understanding of modern slavery issues

75% 9% ↑

agree the School helped achieve this



47% -21% ↓

improved understanding of Fairness, Inclusion and Respect

79% 31% ↑

agree the School helped achieve this



50% NEW

improved approach to the wellbeing of staff

51%

agree the School helped achieve this



14% -10% ↓

implemented a policy for assessing the benefits of using MMC

59% 3% ↑

agree the School helped achieve this



12% -35% ↓

implemented a policy for assessing the benefits derived from implementing lean techniques

65% 45% ↑

agree the School helped achieve this



28% -10% ↓

begun a policy to implement digital transformation

23% -4% ↓

agree the School helped achieve this



32% -14% ↓

saved cost through more effective procurement

46% 25% ↑

agree the School helped achieve this



22% -13% ↓

delivered measurable value improvements through supplier performance management

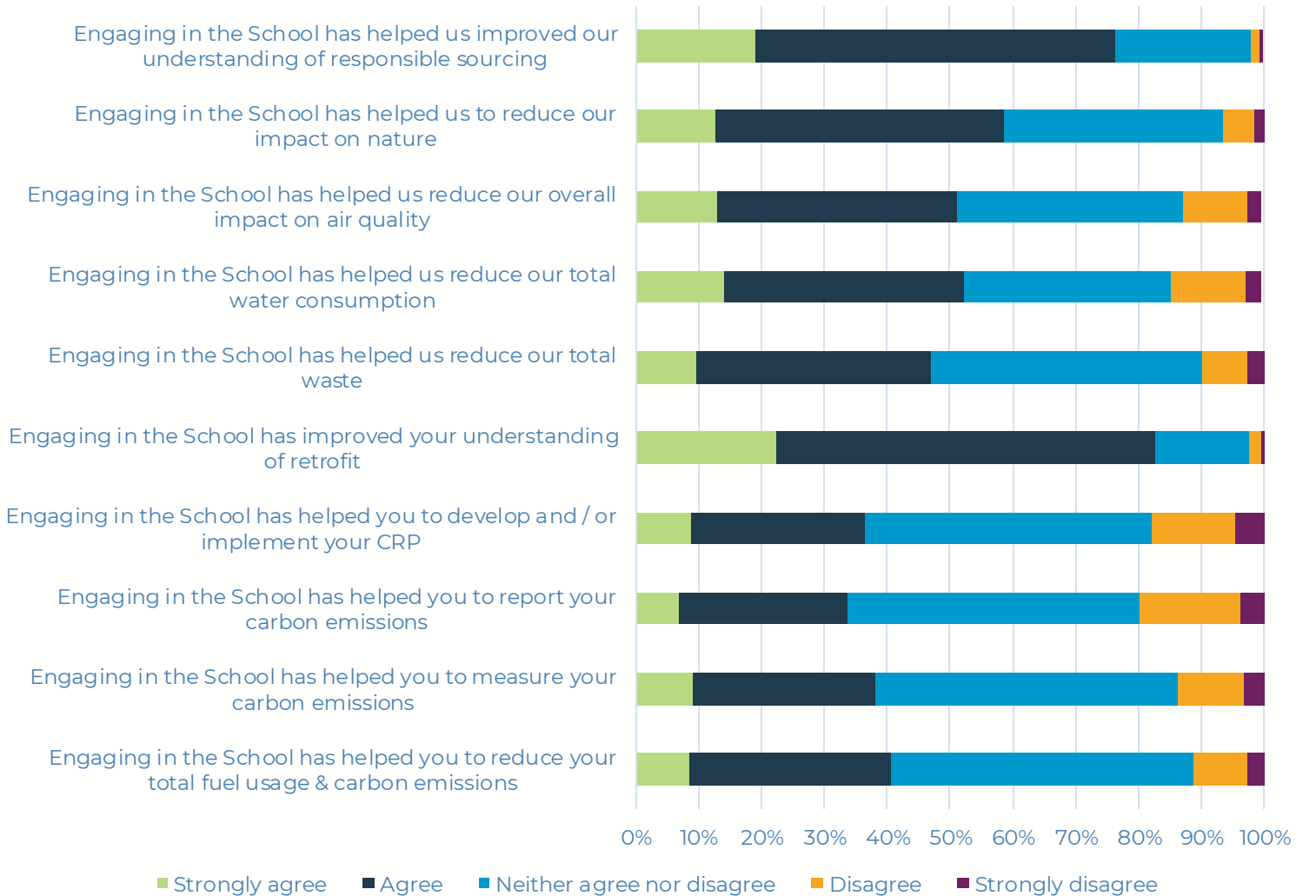
55% 10% ↑

agree the School helped achieve this

Sustainability Impact

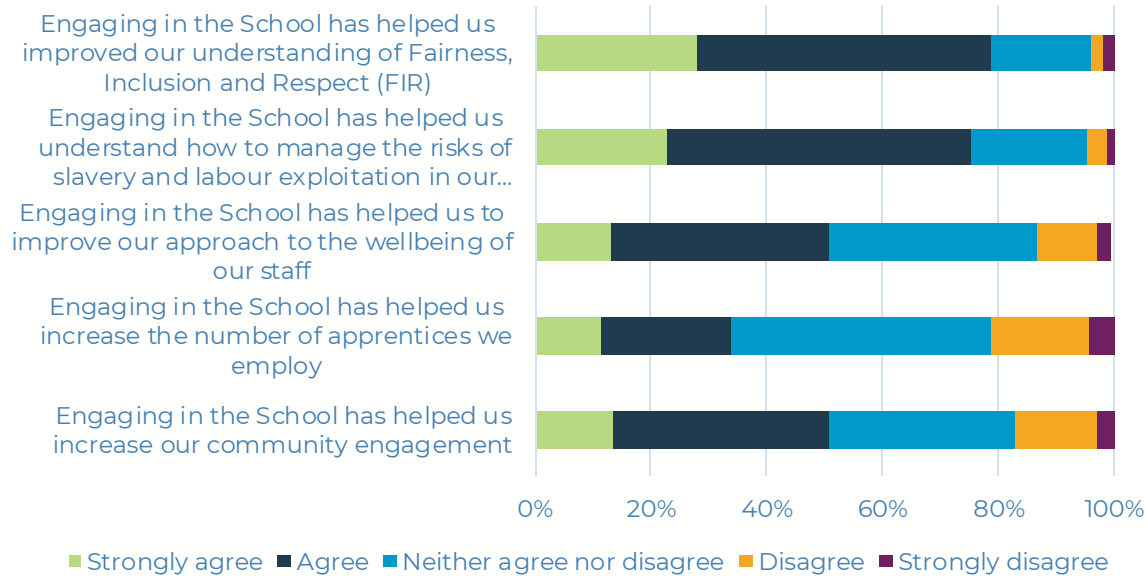
- Metrics on members implementing sustainability practices has fallen in most areas this year, the attribution to the School has increased, sometimes significantly, highlighting the role of the School in a more challenging climate.
- Attribution to the School's impact on carbon reporting and measurement has grown. 14% of members have reported using the Carbon Calculator - the School should prioritise engaging more organisations with this tool. Investment in the Carbon Calculator technology is an ongoing priority.
- Positive progress has also been seen in retrofit, waste reduction, water use, responsible sourcing, and air quality.
- Nature, newly prioritised this year, performed above average in attribution, reinforcing the need for continued focus in this area.
- Smaller businesses report the School has a strong impact on implementing sustainability initiatives, reinforcing its role as a key resource for those starting out and filling gaps where in house expertise is limited.
- More advanced content will be required to continue to impact larger businesses (250+ employees) as their internal maturity improves.
- Impact is highest among newer members (joined < year), reinforcing the need to evolve learning as knowledge matures.

Figure 3. Environmental sustainability impacts attribution – 2026



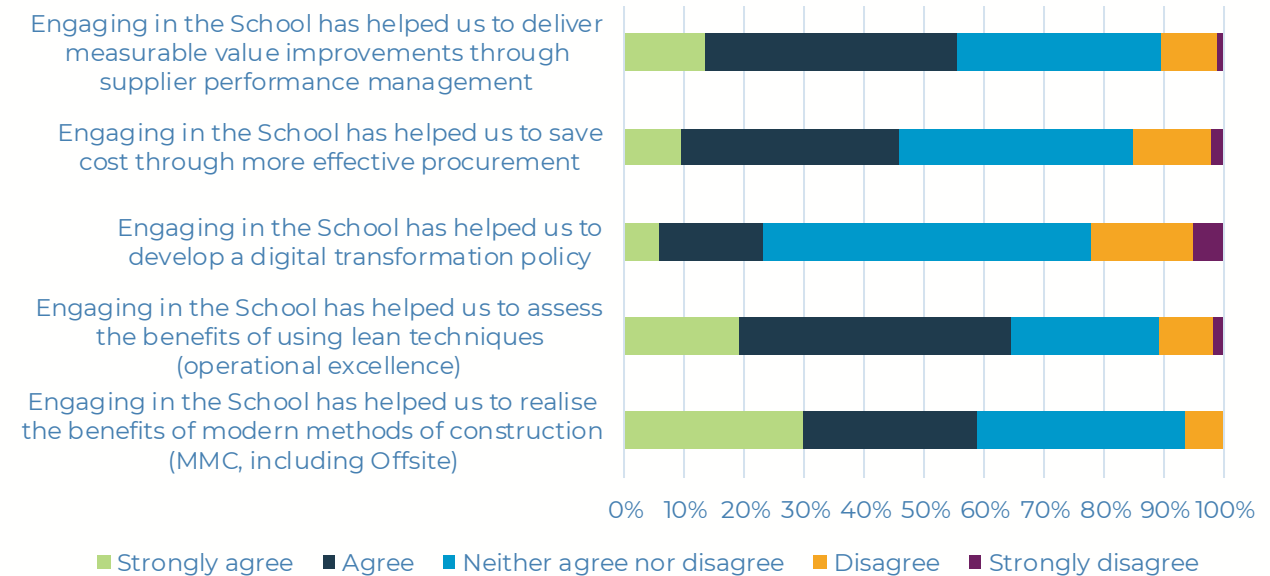
Sustainability Impact

Figure 4. Social sustainability impacts attribution – 2026



- Fairness, Inclusion and Respect content saw major gains, with attribution up 31 points, reflecting recent investment.
- Improvements were also seen in modern slavery awareness and community engagement. Wellbeing, as a new surveyed topic, also performed above average, supporting continued focus in these areas.
- Impact is strongest among smaller businesses and newer members, highlighting the School's role for those early in their journey around people focused topics.

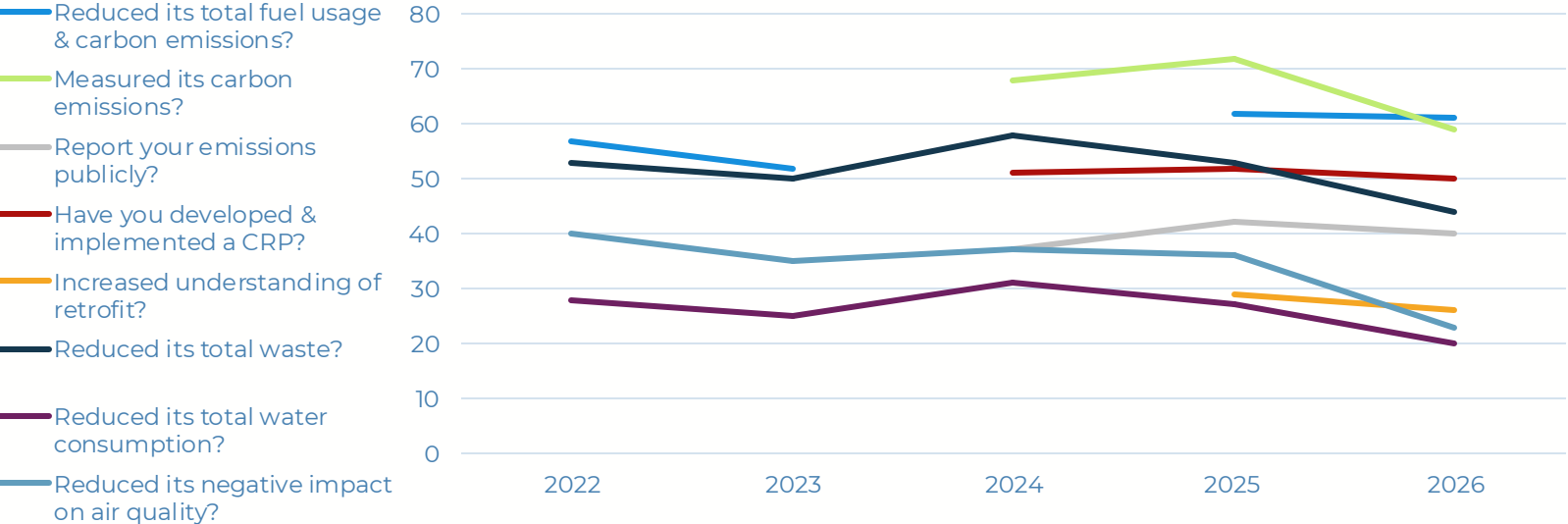
Figure 5. Governance sustainability impacts attribution – 2026



- Attribution has increased significantly for topics like lean and procurement, highlighting the School's role in improving sustainable business processes.
- The refocused topic of lean to incorporate content on operational excellence and quality has been well received and should continue. Members will put value on doing business differently during the current climate.
- The pattern continues among smaller and newer members, where impact remains highest, reinforcing the School's role in introducing new business concepts early in the sustainability journey.

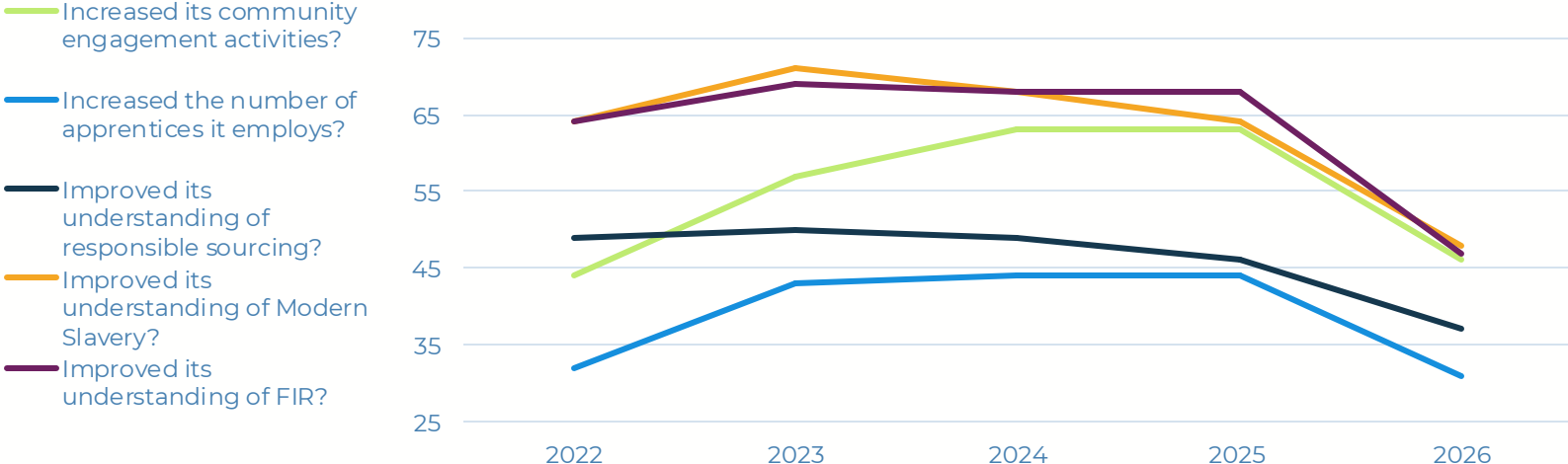
Sustainability Impact: Trends

Figure 6. Environmental sustainability impact on members 2022-2026



- Nearly all indicators drop noticeably in 2026, which could reflect reduced organisational commitment on environmental areas, due to external pressures.
- Likely that as the membership base grows, we reach more people who are not tangibly changing their business processes. The content provided needs to be relevant for different job roles we now reach.
- Carbon measurement and reducing carbon emissions are consistently the highest-performing metrics, suggesting organisations prioritise tracking emissions above other sustainability actions.

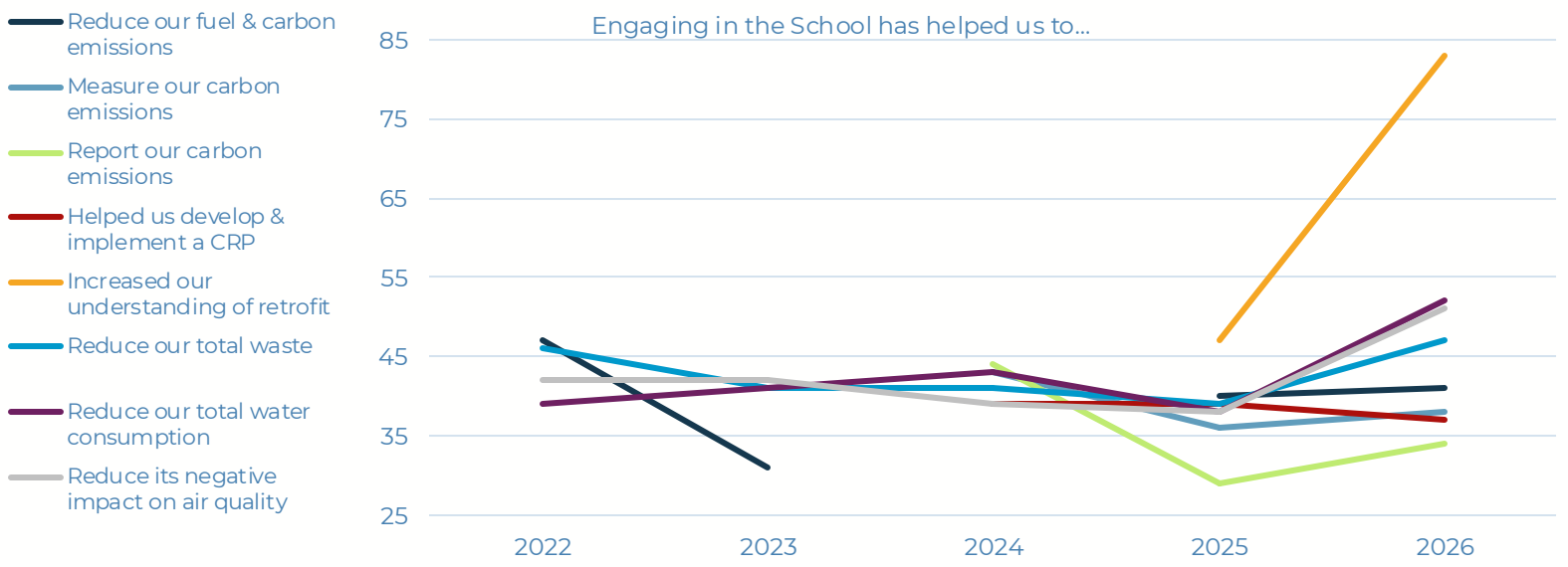
Figure 7. Social sustainability impact on members 2022-2026



- Nearly all indicators drop noticeably in 2026, which could reflect reduced organisational commitment on social issues, due to external pressures.
- Modern Slavery and understanding of FIR have seen significant drops in 2026, suggesting these initiatives may have lost momentum or organisational focus.
- The School should focus on providing impactful tangible content that delivers business needs, moving focus from “why” to “how to”.

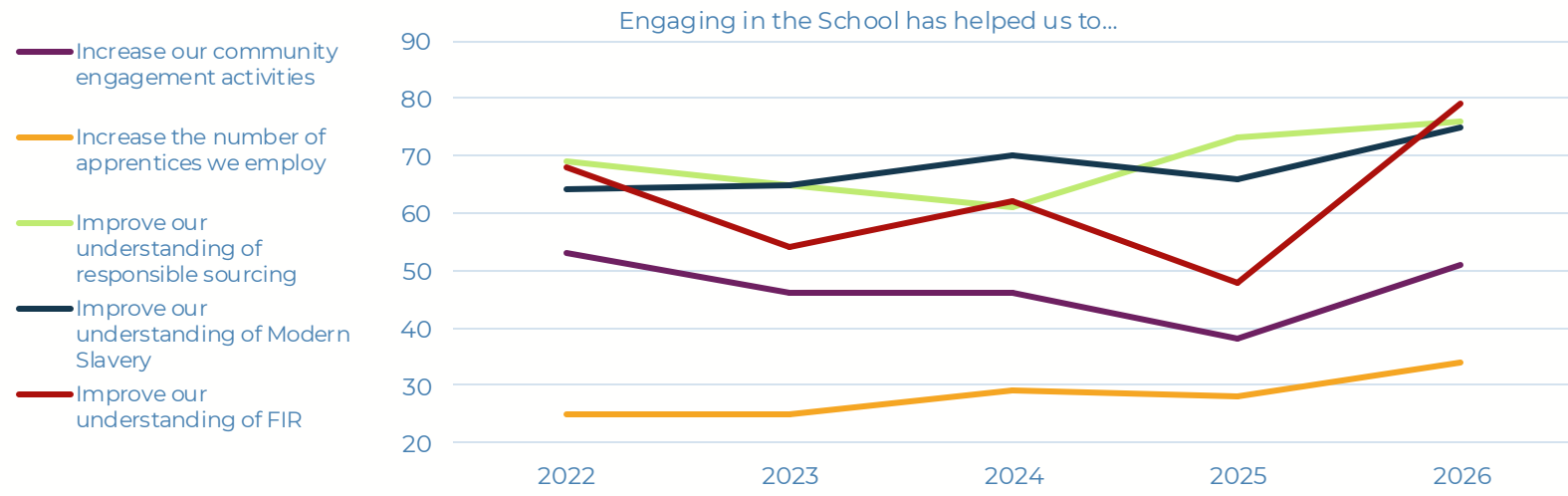
Sustainability Impact: Trends

Figure 8. Environmental sustainability impacts attribution 2022-2026



- Attribution to the School has remained broadly consistent over time, with nearly all metrics rising from 2025 to 2026, sometimes significantly.
- This demonstrates that even as overall impact outcomes face pressure, the School continues to make a difference when it is needed most.
- The sharp recent increase in understanding of retrofit highlights the importance of maintaining focus on this topic as the industry's focus evolves from new build.

Figure 9. Social sustainability impacts attribution 2022-2026



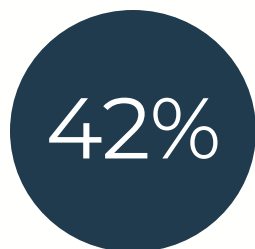
- Attribution to the School on people focused topics has generally improved over time, reflecting the development of improved resources and growing engagement.
- The sharp increase in FIR and Modern Slavery attribution in 2026 reinforces the School's position as a market leader in topics that remain poorly understood further down the supply chain.
- 2026 shows broad improvement across all metrics, recovering from a 2025 dip, though apprenticeships remain a weak spot and a priority for action through the social value topic.

Our Customer's Feedback

Net Promoter Scores (NPS) remain stable at 42% across the customer base, reflecting the ongoing value of the School's accessible, free learning in supporting team upskilling and client needs. However, Partner NPS has declined by 15%, indicating a need to address feedback on advanced learning, platform functionality and role-specific content. These areas require focused improvement to better meet Partner expectations. Encouragingly, NPS across all segments remains within the "great" benchmark range, the standard the School aims to uphold.

Combined

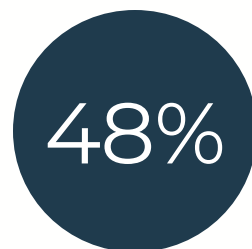
Score	Response	%age
0	4	0
1	2	0
2	3	0
3	7	1
4	7	1
5	52	5
6	55	5
7	125	12
8	213	21
9	175	17
10	372	37
Total	1015	



0%

Partner

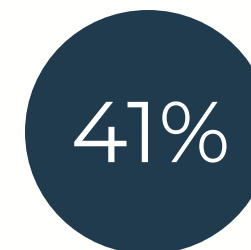
Score	Response	%age
0	0	0
1	0	0
2	0	0
3	1	1
4	0	0
5	3	3
6	7	6
7	14	12
8	26	22
9	23	19
10	45	38
Total	119	



-15% ↓

Member

Score	Response	%age
0	4	0
1	2	0
2	3	0
3	6	1
4	7	1
5	49	5
6	48	5
7	111	12
8	187	21
9	152	17
10	327	36
Total	896	



0%

Demand is towards shorter, flexible and on-demand learning

- 74% of members prefer virtual delivery. The School will continue to offer mostly virtual training across multiple formats to suit different learning styles.
- Whilst virtual workshops, sustainability shorts, e-learning and conferences remain popular, improvements are needed to Learning Pathways and webinars, with Pathway functionality a key development priority for 2026.
- Significant web-enabled enhancements to the assessment and action plan features have been positively received, with 84% of members rating them as good or excellent.

Figure 10. How would you like the School to offer training?

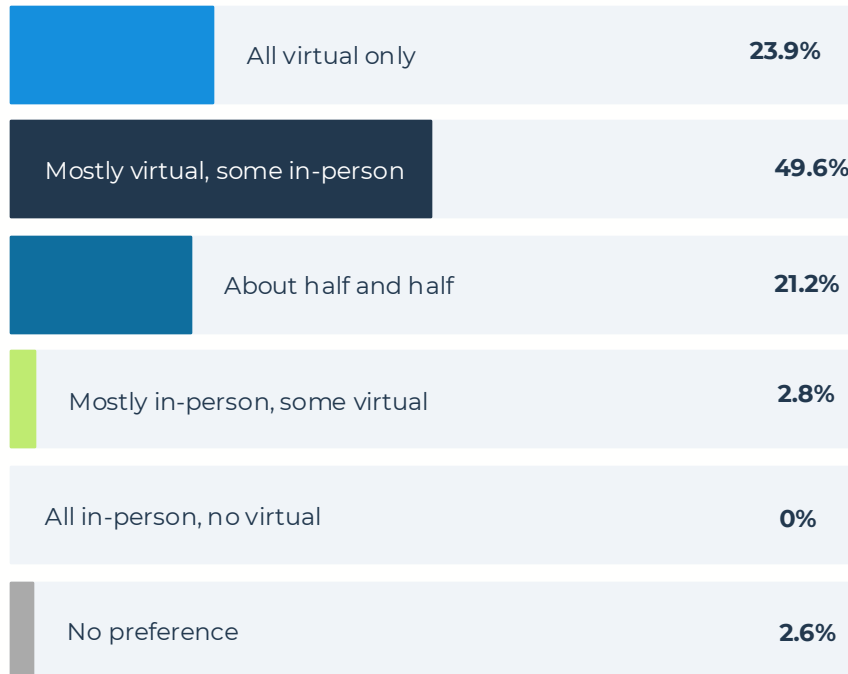
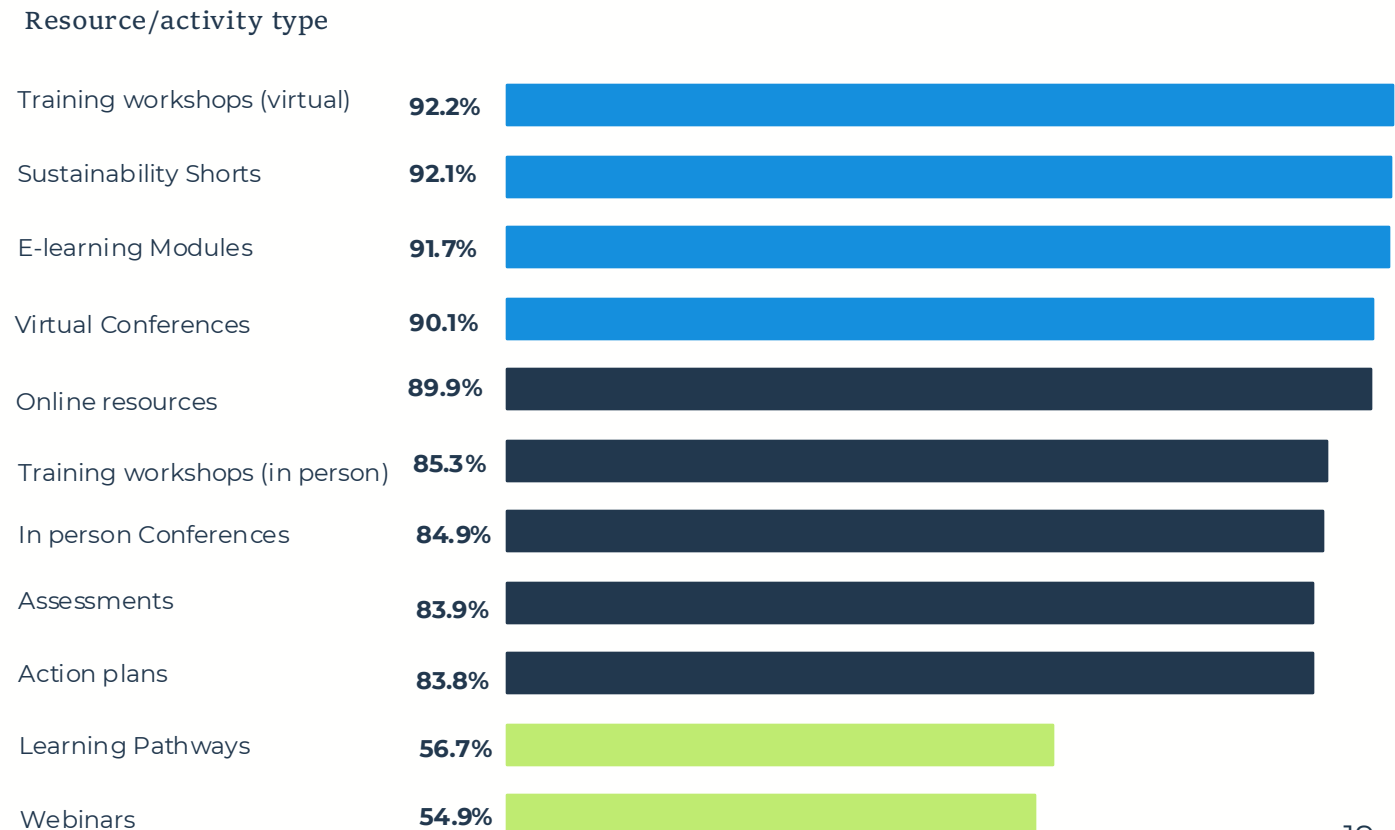


Figure 11. Satisfaction ratings for each resource or activity type

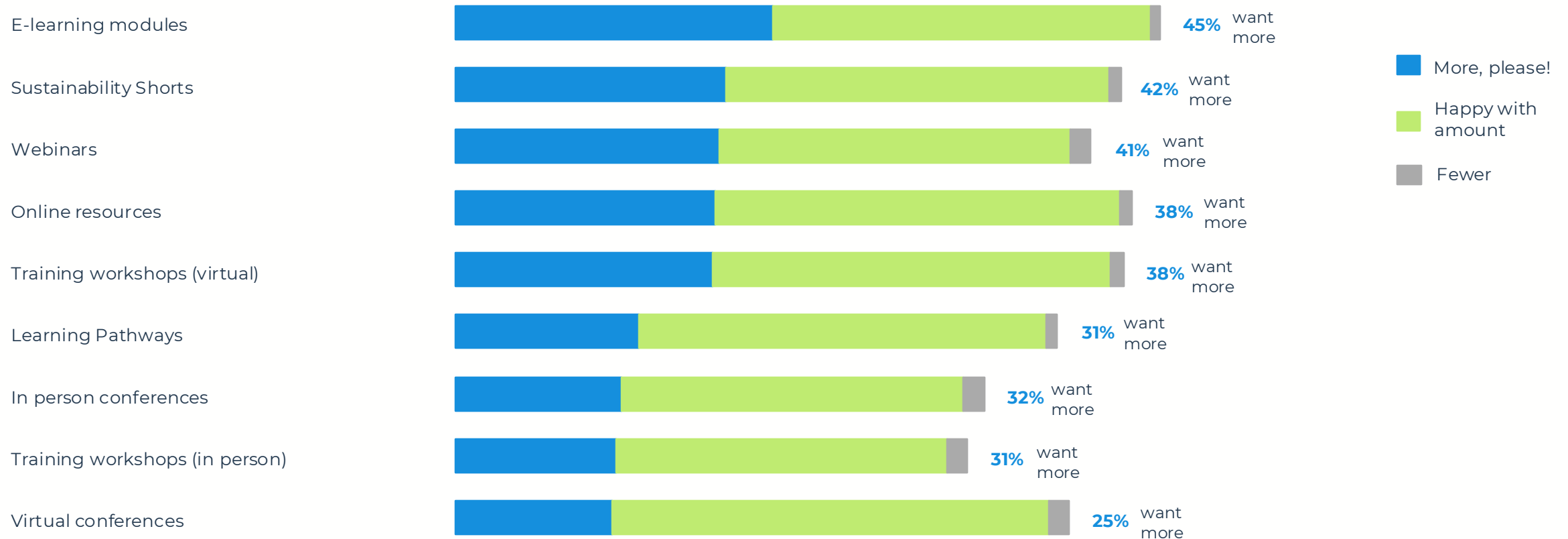


Demand is towards shorter, flexible and on-demand learning

- Members value a range of learning resources, linked to the diverse ways individuals learn. A preference for short-form virtual learning is indicated, with requests for more e-learning, Sustainability Shorts and webinars.
- These resource types are the most accessed resources which shows the need for short, easily accessible on-demand learning. The School's new app will support delivery of this approach. Longer or more traditional formats are still useful and should be provided to deliver a balanced training programme, but less prioritised.

Figure 12. Resources the School offers – would you like to see more or less?

Resource type



Demand for a mix of topics, with a focus on practical implementation

- High demand for environmental sustainability and strategic topics, with over half of respondents requesting more content on energy & carbon, circular economy, environmental management, sustainability strategy and sustainable procurement.
- Secondary focus areas should be supply chain resilience, innovation, and workforce topics, including wellbeing, employment, ethics and the skills shortage.
- New resources should concentrate on these priority areas: practical sustainability implementation, supply chain transparency, and workforce capability, whilst continuing to deliver broader training across all School topic offerings.

Figure 13. What topics do our members want to learn more about – Governance

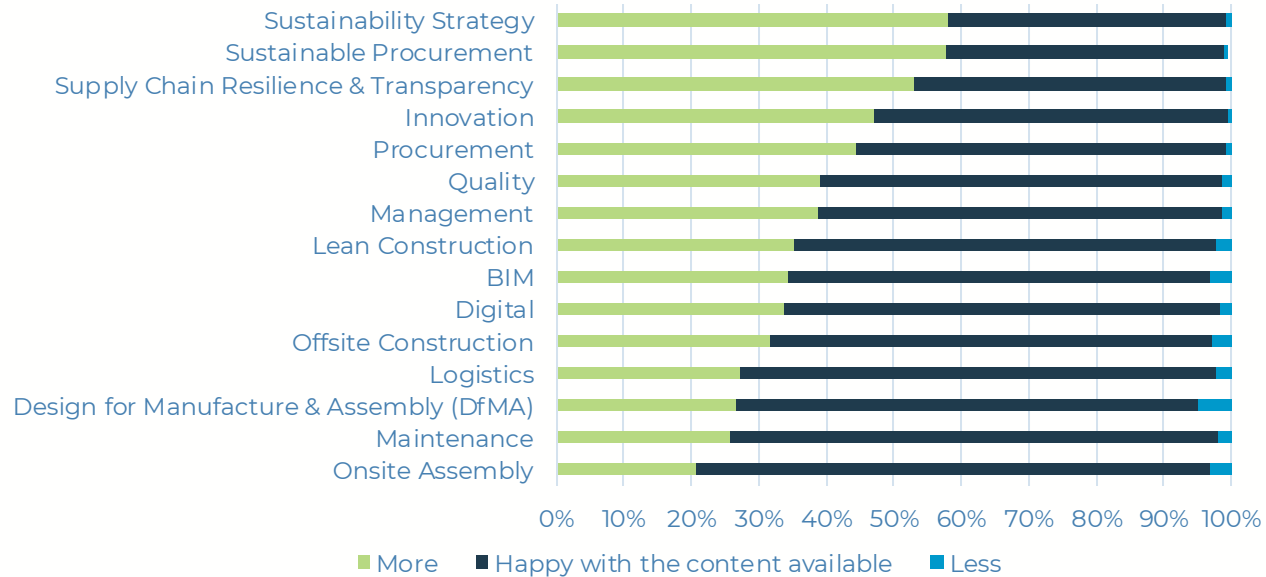


Figure 14. What topics do our members want to learn more about - Environmental

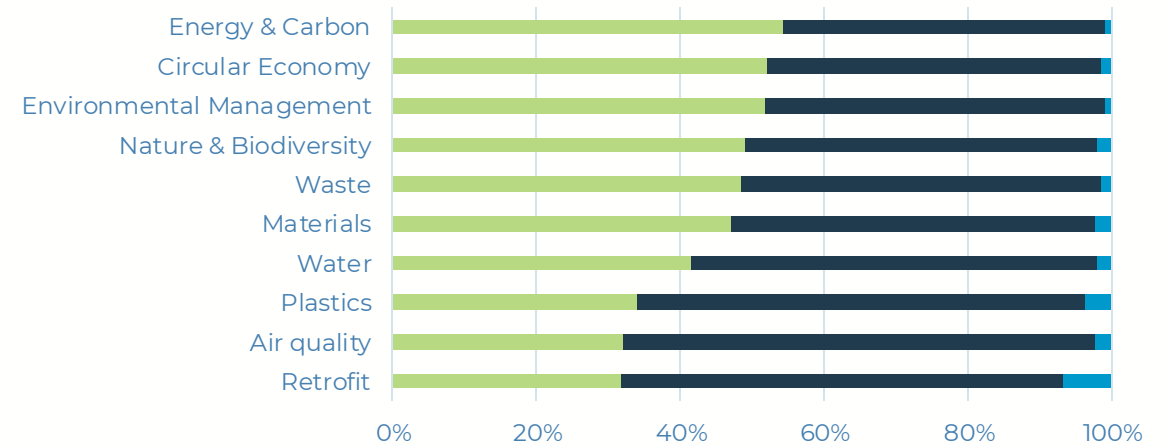
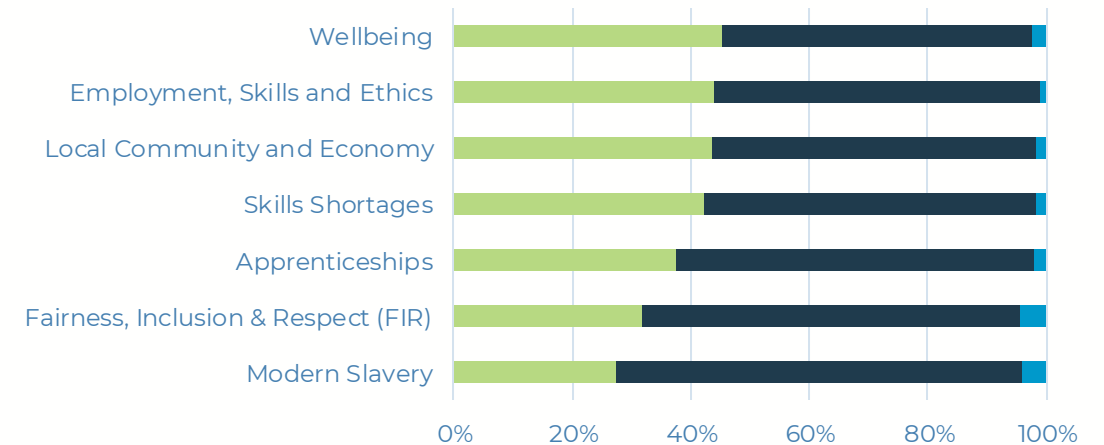


Figure 15. What topics do our members want to learn more about - Social



What this means going forward: From reach to impact

We continue to expand our reach across the industry – the School is reaching more people than ever before.

Impact now depends on deeper, more tailored learning.

The next phase is about turning knowledge into measurable outcomes. The School's role is to evolve from raising awareness to enabling action.



SUPPLY CHAIN SUSTAINABILITY

SCHOOL

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