

Client-Driven Sustainability Priorities in Construction: Insights for Strategic Business Model Transformation

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Abstract

The transition toward sustainable business models in the construction sector requires not only internal organizational changes but also a deep understanding of client expectations regarding environmental, social, and governance (ESG) performance. Anchored in stakeholder theory, this study examines how client-driven sustainability priorities shape strategic business model transformation in construction. Semi-structured interviews were conducted with six key clients—three public sector and three private international organizations—selected through purposive sampling in collaboration with a leading construction company. The interviews explored perceptions of sustainability relevance, expectations for science-based CO₂ reduction targets, and the relative importance of 14 ESG aspects.

Findings reveal a unanimous recognition of sustainability as an essential criterion in selecting construction partners. Although science-based CO₂ targets are not yet widely implemented, half of the respondents anticipate such requirements within the next one to two years, indicating a rapidly evolving regulatory and market environment. A clear hierarchy of client priorities emerged: ethical governance, transparency, anti-corruption measures, and employee well-being form the highest-priority group, underscoring a holistic interpretation of sustainability that extends beyond traditional environmental concerns. Mid-priority topics include waste management and biodiversity protection, while technology-driven or material-specific aspects such as BIM/LCA, use of recycled materials, and renewable diesel appear less critical for clients at present.

The results offer actionable insights for construction firms seeking alignment with client expectations and strategic differentiation in a sustainability-driven market. The study highlights the need for further research involving broader client groups and longitudinal tracking of evolving sustainability requirements.

Keywords: sustainability; ESG; business strategy; corporate governance; stakeholders management

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