

“Green” or Maturing? Environmental Sustainability in Marketing and Business Development amongst Construction Majors

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Abstract. *Perhaps international construction majors are “green” or maturing their green credentials and credibility. Thus, to what extent are major international contractors addressing environmental sustainability? The degree to which this is happening could be reasonably expected to be evident in marketing strategies and business development practices. Three possible options are examined: i) regulatory compliance, ii) alignment with best practice, iii) technical and service development to levels yielding competitive advantage. Four international construction majors are examined at several levels: a) amongst personnel with direct marketing and business development responsibilities, b) amongst other key functions that hold indirect marketing and business development roles in these respects, and c) the extent of effective vertical and cross-functional interfaces with marketing and business development. An inductive and qualitative case-based methodology and methods using semi-structured interviews was applied. The research found that international contracting majors are responders and followers to market drivers rather than proactive developers of technologies and services for injection into their projects to the benefit of clients and society. At a detailed level, marketing and business development proclaimed the “green” policies and practices, but these were largely framed around compliance and best practice rather than proactive development. This finding was supported in the hierarchy and cross-functionally with the result that the construction majors, which are leaders in the sector, have yet to add value in terms of environmental sustainability. In sum, they are “green” rather than maturing their green credentials and credibility.*

KEYWORDS: Business Development, Environmental Sustainability, Market Drivers, Marketing, Technical and Service Development

INTRODUCTION

Are international construction majors ‘green’ in the sense of being in the early stages of developing environmental service capabilities or are they “green” in the sense of being mature in their credentials and credibility? This entry point provides the springboard to examine environmental sustainability (ES) from the marketing and business development (BD) standpoint because these functions commence at the start of project lifecycles, where credentials are claimed and proclaimed to clients and stakeholders. A mature approach to ES should reasonably be evident in marketing and BD practices. Major international contractors could also be expected to be leaders and thus at the forefront of developments. The extent to which major international contractors are addressing ES and developing mature capabilities are likely to fall within three possible options, comprising a predominant emphasis upon:

1. *Regulatory compliance* – with laws, regulations and standards;
2. *Alignment with best practice* – within the sector, benchmarked against other sectors and as part of corporate social responsibility;
3. *Technical and service development* to levels yielding *competitive advantage* – that stretch capabilities beyond marginal improvement amongst the competition and develop specialisms that differentiate value propositions.

To examine these options, the definition of ES is accepted in terms of the dialogue and content espoused amongst the companies investigated, that is, company definitions, responses and actions as

to what constitutes ES. It is accepted that contractors are unlikely to be market makers, yet market followers that have to carve out their market position of which ES can play as a part, especially when the extensive bundles of (potential) environmental capabilities might be in increased demand.

Four international construction majors are examined: a) amongst personnel with direct marketing and BD responsibilities, b) amongst other key functions that hold indirect marketing and BD roles, and c) at the vertical and cross-functional interfaces with marketing and BD. Methodologically, an inductive and interpretative approach is adopted, recognising the subjectivity of respondents taking part in the semi-structured interviews and the subjectivity of interpreting the data collected. Whilst the literature was used to provide context and frame the analysis, the questions were not directly informed by the literature. An inductive and qualitative case-based method was employed. Claims are not made that the findings and analysis will lead to theory building. The findings will improve understanding of industry responses to dynamic environmental issues, and provide insights about marketing and BD in contracting organisations, which remain under-researched. Marketing and BD is addressed as part of the potential ES set of responses and actions.

The findings show international contracting majors to be reactive responders and followers to market drivers rather than proactive developers of ES technologies and services. Marketing managers and BD managers (BDMs) were aware of the need for ES inclusion into prequalification documentation but were inactive in developing ES value propositions for win-strategies and project execution. BDMs proclaimed their “green” policies and practices. Two of the case companies rhetorically expounded their leadership role in the practical development. Yet, action was confined to compliance and ‘best’ practice rather than proactive service development or market advantage. These findings were supported by a lack of systematic integration of functions for leading construction majors to add value in terms of ES and from a BD perspective, as opposed to meeting the minimum requirements. In sum, they are green in the sense of being immature. The companies examined are thought to be typical.

The paper proceeds as follows. A brief literature review covers two main areas, namely, ES, and marketing and BD, followed by a methodology and methods section. The findings and analysis of the empirical investigation are then presented. Conclusions and recommendations for research and practice round off the work.

2 LITERATURE REVIEW

Marketing and ES are two large topic areas, which cannot be reviewed in full. Nor is it necessary to offer detailed reviews because the analysis will primarily proceed inductively with the literature acting as context and for comparative purposes to assess both new knowledge and theoretical enrichment. In addition, the definition of ES is being accepted in terms of the companies investigated.

2.1 Environmental sustainability

Construction is part of facility and infrastructure provision; it is part of the development process. As context, ES is concerned with improvement for long- and short-term outcomes through meeting economic, social, cultural and technological needs (Sage, 1998; Preece et al, 2011). Awareness has been increasing in the global ES issues since the UN Rio de Janeiro *Earth Summit* in 1992, the Kyoto protocols and the more recent Copenhagen summit. Sustainable development concepts and practices have been introduced. Sustainable construction is described as part of sustainable development, which includes design, tendering, site planning and organisation, material selection, recycling, and waste minimisation (Langston and Ding, 2001). Construction industries potentially have a significant contribution to make as construction, building materials and associated professional services account for circa 10% of GDP and are major employers in developed countries (Ive and Gruneberg, 2000). How the construction industry responds is a matter of applied practice and for research investigation. Establishing principles for sustainable development is problematic, linking back to definitions and scoping of ES. Whilst the aim is to avoid narrowing the focus, it is appropriate to review the kinds of issues that can be embraced. Facility lifecycle chronology is pertinent in that:

1. *Pre-construction* involves design and front-end construction considerations, requirements and design configuration, and the manner in which work packages are configured in relation to design rework and construction integrity in situ;
2. *Construction product* involves embodied energy derived from the design and construction, e.g. specification and choice of materials to meet specification;
3. *Project management* involves methodologies, management and behavioural practice to increase efficiency;
4. *Use* involves whole life costs of the fabric and operations, plus facilities management.

“Design and cost in use” factors are most significant, more so than how contractors perform, yet all issues are worthy of address given the sector contribution to GDP and its environmental impact. Efficient and effective input control criteria are important for:

- i) Minimisation of resource consumption.
- ii) Maximisation of resource reuse.
- iii) Use of renewable and recyclable resources.
- iv) Protection of the natural environment.
- v) Creation of a healthy and non-toxic environment.
- vi) Pursuit of quality (Miyatake, 1996; Preece et al, 2011).

Further, there are theoretical concepts that can be mobilised to achieve goals, for example:

- Lean construction applying waste elimination and last planner to increase efficiency;
- Agile practices to increase effectiveness;
- Concepts of innovation and adoption.

This review might be expected to inform the types of responses and actions of individual contractors in the marketplace. Approaches to establish applied principles arise from different practice-based viewpoints and thus can be seen as lenses through which practice can be developed and inductive research proceed. The lenses applied by practitioners frame this analysis rather than been inductively imposed by theory. How ES is evidenced on the ground can be expected to engage with multiple organisational functions, such as bid management, procurement and supply chain management. Marketing and BD functions are important functions that help shape projects (e.g. Cova et al, 2002), including ES value and service provision.

2.2 Marketing and business development

Levitt (1983) defined marketing as creating and keeping a customer. Kotler (2000) adopted an inclusive approach, as do many national professional marketing bodies. The marketing mix (Borden, 1964; see also McCarthy, 1964) was originally based upon four ingredients (4Ps, comprising product, place, promotion and price) and subsequent variants. Relationship marketing (Berry, 1983) developed around business-to-business (B2B) relationships, particularly intangible services. Precise definitions arise from paradigm choice.

The marketing mix is transactional and has been dominant in project markets (Cova et al, 2002). It remains a strong force, especially where bid price is the overriding criterion and despite the fact that outturn prices vary considerably from bid prices (Skitmore and Smyth, 2007). The transactional location of the marketing mix is at the discrete points of contract exchange and stage payments. From a sales perspective, BD is reactive, soliciting project pipeline information and engaging with clients to prequalify for projects (Smyth, 2000).

Relationship marketing is client focused, tailor-made services being configured for each exchange to add product and service value through in-depth understanding of clients. Anticipated repeat business and premium profit are direct benefits to the supplier (e.g. Grönroos, 2000; Gummesson, 2000; Christopher et al, 2002). Here, the supplier is a proactive market manager (Smyth, 2000) and shaper of projects (Cova et al, 2002). Relationship marketing emphasises service as well as technical and technological content. This has been developed in a project context as project marketing, where the shaping of projects is a particular concept pertinent to this research on ES (e.g. Cova et al, 2002).

Marketing conceptually includes strategies for implementation, that is, selling or BD (Preece et al, 2003). Historically, BD has been isolated from other functions and site operations (Pinto and Covin, 1992; Turner, 1995). Under relationship marketing, BD conceptually starts prior to a project being identifiable (Cova et al, 2002) and continues through the front-end and into project management during the execution phase and beyond completion, that is the “sleeping relationship” with BD sights aimed at repeat business and referrals (Cova et al, 2002; Smyth and Fitch, 2009). It has been claimed that BD is in transition from the transactional marketing mix approach towards a relationship marketing approach (Smyth, 2000; Preece et al 2003; Smyth and Fitch, 2009). Yet BDMs were recently found to treat other parties as sources of information to progress projects through the project pipeline, rather than applying any management guidance to build different types of relationship (Chambers et al, 2009). This may act as a constraint for developing ES when projects are shaped.

Integrated cross-functional systems are ideally needed over project lifecycles to deliver integrated solutions that satisfy client needs, including ES content and service provision. Such systems are key to leveraging value and reducing resource inputs to effect sustainable development. “Green marketing” became a term emanating from Europe that has been applied to reflect and promote ES practices (Cai and Li, 2008). “Green marketing” incorporates product and process in ways that benefit the customer, supplier as well as the environment (Polonsky, 1994). It aims to bring together marketing and ES. It lacks rigorous conceptual content; it is a lens to focus activity and promote services that could aid project shaping.

Construction majors have become less responsible for production on site. From a marketing perspective they are responsible for integrating value propositions and solutions supplied by others: they are systems integrators selling integrated solutions (Davies et al, 2007). The capabilities necessary for this role are the ability to identify, capture and deliver ES value from in-house, supplier and subcontractor networks. ES requires different sets of technical capability, more so if specialist areas of expertise are developed to differentiate the service. Identification and integration starts at the BD stage. BDMs have a primary role in shaping projects (Cova et al, 2002), in this case, ES propositions to form valuable solutions for integration and delivery during execution.

3 METHODOLOGY AND METHODS

Interpretative methodologies respect the value-laden nature of research: the subjective views of respondents and the subjectivity of analysis (Krieger, 1979; Sayer, 1992; Denzin, 2002). Respecting perceptions helps enrich understanding of action and behaviour amongst respondents and actors with whom they interact. It respects the strengths and weaknesses of organisational artifacts and processes, helping to yield meaning around evidential patterns and draw attention to significant events and outcomes (Smyth and Morris, 2007).

An inductive case study method (Yin, 2003) was adopted. Specifically, a case-based approach was applied (Eisenhardt, 1989; 2007), using semi-structured interviews to solicit qualitative data to address why and how issues. The analysis presented here is part of a broader programme of work with different aspects of the findings being reported elsewhere (e.g. Smyth, 2013; Smyth and Kusuma, 2013). The substantive focus here is ES. In contrast to Eisenhardt’s hybrid approach to grounded theory, there is no expectation of theory building from this analysis. Rather the aim is to ascertain whether ES, marketing and BD functions are linked on the ground through evidence and then to interpret the findings in the light of theory.

The UK operations of four international construction majors were investigated through a series of semi-structured interviews conducted over the first and second quarters of 2012. The number of interviews per contractor varied slightly, the general approach being to cover a Board Member with responsibility for Marketing, Head of Marketing/Business Development, two Business Development Managers (BDMs), Head of Procurement, and two Project Managers. All companies and personnel interviewed are kept anonymous for reporting purposes. The research has not been concerned with individual performance. The focus is organisational, and concerns business effectiveness. A schedule is provided in the Table 1.

Table 1 : Schedule of case study contractors and personnel

Contractor Alias	Ownership	Primary Activities	Divisions Interviewed	Interview Respondents
EUCo	EU country	Civil Engineering & Infrastructure and Specialist Subcontracting	Civil Engineering & Infrastructure	Chief Executive
				2 Regional Business Development Managers (BDMs), 1 Senior BDM and 2 BDMs
				Head of Public Relations and Communications
				Contracts Manager
				Head of Business Processes and Sustainability
EuroCo	European	Building, Civil Engineering & Infrastructure and Specialist Subcontracting	Building, Civil Engineering & Infrastructure	Customer Solutions Director
				Head of BD
				Sector BDM
				BD Coordinator
				Head of Procurement
				Commercial Director
				Technical Service Director
2 Project Directors				
AntCo	Antipodean	Construction and Development	Construction	Head of New Business
				Head of Procurement
				Bid Manager
				Head of Project Management
UKCo	UK	Building, Civil Engineering & Infrastructure, Consultancy	Infrastructure and Consultancy	BD Director
				2 BDMs
				Head of Procurement
				2 Project Managers

Source: Smyth, 2013.

The inductive approach means that the case study firms set their own parameters as to what constitutes ES, indeed marketing and BD. The extent to which the evidence aligns with theory, especially marketing theory, provides the basis to evaluate how penetrating ES is in project business practice located in a competitive marketplace.

4 FINDINGS AND ANALYSIS

The prioritisation of “environmental sustainability” was addressed to all respondents, respecting the definition, and understanding they each carried and responsive action taken for ES. Profit was assumed as a given priority for survival and growth. Health and Safety (H&S) figured strongly as an equal top priority with one senior management respondent saying that H&S was necessary to be “in the game”. ES was generally described as a second level priority – see Table 2 – thus yet to be fully developed in thinking and action. This overview, which was taken as a “snapshot” in all firms, was confirmed at a more detailed level through subsequent evidence provided.

There was a widespread recognition that ES was becoming increasingly important, although internal company rhetoric appeared to be ahead of practice (see below). Project Managers recorded the lowest priority for ES, hence for site operations (Table 2). One possible reason was due to the implementation of behavioural programmes akin to H&S. Behaviour covered site operations yet extended to cover the rest of people’s life (cf. Roberts et al, 2012). A behavioural programme is easier to apply to office rather than site operations for ES, so mainly covered issues of travel to work, recycling in the office and the rest of people’s personal life. EUCo started a behavioural initiative with these attributes through a series of workshops. Progress on site has also been constrained by client rollback, recession constraining the demand and development of environment-related services. Clients, including the government, were reported as currently interested in lower costs; therefore sustainability is perceived to the extent of employing lean agendas for site operations and reduced whole life costs. Therefore importance was being ascribed to ES but it was not penetrating the project lifecycle and project execution. This begs the question as to whether it was being given consideration

at the front of the front-end where projects are (potentially) shaped through marketing and BD functions.

Table 2 : Prioritisation of environmental sustainability

Company	Respondent	Environmental Sustainability	
		Prioritisation (Rank where stated)	Comment
EUCo	Chief Executive	2 nd or lower	Aspirational initiative
	BDM	-	...almost a given
	BDM	2 nd or lower	Important for particular clients
	BDM	-	H&S is no.1, and sustainability is linked through behaviours and cultures
	Head Public Relations and Communications	-	Talked about H&S, not ES
	BD Director	-	-
	Contracts Manager	2 nd or lower	-
	Head of Business Processes and Sustainability	2 nd	Company has won awards in the area
EuroCo	Customer Solutions Director	2 nd	A second tier priority
	Head of BD	2 nd	Would not add 1% total to a bid price for it: "its not belt and braces, just braces".
	BDM	2 nd	Company has won awards in the area
	BD Coordinator	2 nd	A differentiator for selling
	Project Director	3 rd	-
	Project Director	2 nd or lower	1 st as the "party line"; lower in reality
	Technical Service Director	1 st -2 nd	1 st for limiting environmental damage, not marketing; "they still have a long way to go"
	Commercial Director	-	Compliance
AntCo	Head of New Business	-	They want to leave positive legacies
	Head of Procurement	2 nd	-
	Bid Manager	2 nd	"We are genuinely better than the competition on that. ...It's a huge differentiator."
	Head of Project Management	2 nd or lower	A "core belief" and needs to be embedded to be effective
UKCo	BD Director	-	"We fly the corporate flag"; "the messages they want to portray to the world"
	Head of Procurement	2 nd	"Just trying to shape what that looks like"
	Project Manager	-	"...being forced down that avenue. Whether we would have done it naturally is a matter of debate."
	Project Manager	2 nd or lower	"...very much there"; yet still on the margin of becoming a top priority
	BDM	2 nd or lower	Moving up the pecking order
	BDM	2 nd or lower	ES is addressed through the lenses of compliance and best practice in PQQs; not an active part of marketing and BD

BDMs gave ES a similar prioritisation to other respondents (Table 2). BDMs acted in response mode rather than proactively developing value propositions: "If you know the drivers you can recognise what opportunities are likely to have most success..." (Interview with a Senior BDM, EUCo). Understanding "drivers" was problematic. Personnel across the case companies repeatedly hide behind business jargon; the real issues were obscured and value compromised. To most respondents, "client drivers" concerned getting information on project requirements, to some respondents it meant understanding the criteria of key clients and professional decision makers, to a few it meant understanding client business solutions or organisational purposes the projects were addressing, and to one person it meant understanding the client core business to appreciate what they perceive as valuable. This finding pervaded all opportunities to shape projects, but specifically

affected ES. Identifying and capturing ES covers multiple functions, starting with value configuration derived from BD – shaping that helps assess how “green” or mature firms are in relation to ES.

For EuroCo specifically, added value was largely perceived to be about cost reduction via lean and value engineering. BDMs were selling a vision rather than making promises. The Customer Solutions Director emphasised managing risk, rather than value as the selling point. ES was confined to meeting requirements. It was part of EuroCo’s marketing strategy, however, this was more concerned with compliance to secure qualification than delivering value during execution. Similarly, EUCo’s top management stated that all the identification of value comes through BD, and is injected into the prequalification stage.

Across all the case companies, BDMs failed to understand supply chain capabilities and key suppliers as a means to add value in tailored ways to suit client needs. Similarly, Procurement was insufficiently engaged with BDMs across the companies in order to effectively align procurement decisions with client needs. Therefore, identifying technical value propositions was marginal for BDMs. Value was inadequately handled between BDMs, Bid Managers, during post-tender negotiations by Procurement and Project Managers in execution. As a EUCo Senior Business Development Director commented, *the one thing is that there is a lack of imagination*; and furthermore, *the company does not recognise itself as a service provider*. Therefore, developing capabilities to secure certain types of ES technological and service content that would aid BD and responding to particular ES requirements of clients was largely excluded through Procurement and supply chain management functions, which developed their own independent qualifying processes.

Bid Managers, Procurement and Project Managers therefore address projects through their own lenses of expertise, typically reinforced through a task rather than a service or client focus. ES provision is seen as purely technical defined separately through each function, in evidence through the separate and independent procurement system and application of ES principles within Procurement. AntCo’s Procurement had some sound sourcing principles for suppliers, yet there was insufficient ES collaboration with subcontractors. An AntCo Bid Manager stated: *They do work fantastically well together if they are joined together in the right way*. Silo thinking was reported as dominant and did not identify opportunities early enough in the cycle – they have yet to develop “stretch targets” and map out pathways to develop and mature capabilities (Interview with the Head of Project Management, AntCo). The approach was to respond bid-by-bid, project-by-project rather than to develop consistent capabilities because it was reported, “Power builds up walls” (Interview with a Bid Manager, AntCo).

In EUCo, responsible sourcing had been introduced, yet ES practices were not working well with subcontractors (Interview with the Head of Business Processes and Sustainability, EUCo). Every bid has a sustainability impact assessment and every trade “a heat map” and risk mitigation assessment, but this only extended to the first tier of supply chains. Assessment was more concerned with risk than ES criteria. As a Contracts Manager reflectively commented: *We are not great of thinking of more for ourselves*. In EuroCo, all subcontractors were assessed against their KPIs for their last three projects. Subcontractors sign a sustainability procurement document, covering: H&S; ethical sourcing; equality, diversity and inclusion; environmental and green sourcing; best value procurement; quality management. This initiative was adopted from the public sector, the Olympic Delivery Authority and the Greater London Authority policies being influencers. There was an expectation that subcontractors reach the same standards as EuroCo, but there were mismatches. The company has introduced coaching and support to improve subcontractor performance. UKCo have also introduced centrally led strategic sourcing in procurement. It had not yet resulted in a seamless ES service. UKCo were probably lagging compared to the other three case companies in this respect.

All the companies had procurement systems that were uneven and partial in relation to ES. Procurement did not interface with other functions, including marketing and BD, hampering the ability to deliver integrated services and added ES value. Thinking and systems were confined to departmental expertise and function respectively. Subcontracts and work packages across all the companies were divided up for ease of contractual management and risk management rather than value maximisation. There were weak systems between functions across project lifecycles (cf. Roberts et al, 2012).

Main contractors are said to be systems integrators selling integrated solutions (Davies et al, 2007). They subcontract work for design on D&B, PPP and turnkey projects and subcontract site work. All

the case companies subcontracted site work. Three companies had specialist subcontract divisions, one of which included professional services, yet they were treated along similar lines to subcontractors. The case companies were inefficient and ineffective systems integrators from an ES value viewpoint, although they may be deemed efficient from an economic perspective of input-output ratios, return on capital employed (ROCE), where survival drives costs and investment to minimal functional levels (Skitmore and Smyth, 2007), which are functions of effective risk management outcomes. Meeting time, cost and quality/scope against the requirements at a minimal level provided the activity focus for ES. In EUCo, ES was about compliance with regulations and pursuit of best practice. Clients drove change. The construction majors were not driving the development of new environmental capabilities and specialisms to differentiate value propositions as win-strategies and secure competitive advantage.

There was a sense that rhetoric is extended beyond reality. Three case companies stated they were the best: *We are genuinely better than the competition on that. ...It's a huge differentiator* (Interview with a Bid Manager, AntCo). They cannot all be 'best' or equal best. It is likely that several are close and insufficiently differentiated: *...there is a lot of spin going on around sustainability... and a lot more that could be done* (Interview with the Chief Executive, EUCo). As a EuroCo Contracts Manager admitted about environmental capability: *It needs to be more honed and get more direct applications made use of. ...We are too inward facing. We are not brave enough approaching clients.*

In summary, BDMs tended to be isolated. They did not shape projects towards developing ES (cf. Cova et al, 2002). The case companies are largely structured around projects and project tasks rather than clients or services. The front-end and project management lacked integration (cf. Morris, 1994). There was a great deal of rhetoric about ES, but it lack substantive content and most of the actions were stated as meeting regulatory requirements and accepted (largely undifferentiated) industry standards. ES compliance and 'best' practice therefore dominated despite claims to go further. Compliance is conformance to regulatory and company policy, whereas reflective practice is aimed to improve behaviour in management and for site operations. To paraphrase from recent H&S research:

Marketing and [ES] were largely disconnected strategically. There was evidence of tactically using [ES] in pitching for work, following conformance and track record, especially for prequalification. Service development for competitive advantage and adding service value was absent. (Smyth et al, 2012)

5 CONCLUSIONS AND RECOMMENDATIONS

International construction majors are responders and followers rather than proactive developers of ES technologies and services for clients and society. Marketing and BD proclaimed the "green" policies and practices, termed ES in the findings. Several of the case companies rhetorically expounded their leadership role, yet practice fell short. Substantive content was aligned to regulatory requirements and industry standards. Action was therefore framed around compliance and best practice rather than technical content and service development. Content that is aligned with regulatory requirements and industry standards fails to differentiate ES responses that would align with effective marketing. Thus the companies were 'green' rather than mature in establishing ES credentials and credibility. From the marketing perspective, it would be reasonable to expect that ES might form a service of competitive advantage, driven by cost reduction or added value, but this was not found in this research, confirming other research on H&S as service provision (Smyth et al, 2012). Therefore in terms of capability maturity set out at the beginning, *regulatory compliance* and *alignment with best practice* were prevalent rather than *technical and service development* to yield *competitive advantage*. Thus, the analysis found international contractors fall short of adequate systems integration (cf. Davies et al, 2007) because of the lack of internal systems as well as a consequential lack of systems for drawing together suppliers and subcontractors to deliver ES, and contractors were not proactively developing ES services; they remain reactive.

Normative or prescriptive ES capability is not essential. Yet the findings show that most of the case companies believe they have developed these capabilities and are leaders. The findings contradict the claims made. ES is a domain for socio-political and economic concerns, which society is trying to address. The international contractors have yet to substantially contribute to mitigate these

societal concerns. Marketing and BD do not exhibit evidence of ES development for competitiveness and are not driving ES improvement.

The number of in-depth case companies investigated is limited. Yet, the findings confirm other recent work on marketing services (Roberts et al, 2012; Smyth et al, 2012). The ES angle makes an original knowledge contribution derived from inductive analysis. Further research is recommended into a broader range of contractors by size and service provision. The practice recommendations are for contractors to develop integrated systems (Smyth and Fitch, 2009) and senior management to develop robust approaches towards marketing and business development.

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