European Commission **European Construction Sector Observatory** Providing valuable INSIGHT on the European Construction industry Dear subscribers, The ECSO Team wishes you happy winter holidays and a great start to the new year! May 2022 be filled with health and prosperity! **Subscribe to ECSO updates** The European Construction Sector Observatory The **European Construction Sector Observatory** (ECSO) aims to inform European policymakers and industry stakeholders on the market conditions and policy developments through regular analysis and comparative assessments. Visit our **website** and gain access to a wide range of industry data and analysis. **ECSO** has all the information for you to stay up to date with the latest news and practical analyses about the European Construction sector. 28 Country Fact Sheets, 175 Policy Fact Sheets, 9 Analytical Reports, 3 Trend Papers and our **updated website** are now online. IN THIS NEWSLETTER YOU WILL FIND: **6 Updated Country 5 New Policy Fact** Scenarios for a **Fact Sheets Sheets** transition pathway for a greener, more digital and resilient construction ecosystem Energy and resource efficiency in the construction sector With the EU twin transition - digital and green, the construction sector is expected to play a key role in helping the EU achieve its climate objectives. As a result, several EU MS have put in place several policy measures, programmes and initiatives addressing the construction sector. Resource efficiency focuses on reducing the consumption of primary and non-renewable materials, creating high-quality products with minimal waste, and retaining long-term product value, as well as using novel construction processes. Energy consumption of existing buildings is addressed via renovation to modernise the EU building stock and pave the way for decarbonised and clean energy systems. **Policy Fact Sheets** Five new Policy Fact Sheets (PFS) are now available for download, focusing on policies in Belgium, Luxembourg, Portugal, Romania and Sweden. The fact sheets provide an analysis of four national policies influencing the development of the construction sector in the area of energy and resource efficiency. **Belgium - Sustainable Materials Construction Programme 2014-**2020 The Sustainable Construction Materials Programme (SCMP) 2014-2020 provided a **European Construction Sector** framework to enable the construction sector **to** work with and manage materials more sustainably, based on the circular Policy fact sheet construction concept. The programme was launched in 2015 by the Public Waste Agency of Flanders (OVAM), and over 96% of construction and demolition waste was recycled as a result. SCMP focuses on i). Selective demolition and disassembly; ii) Closing the stone waste loop; iii) Closing the non-stone waste loop; iv). Environmental performance of building materials; v) Design for change. It has proven to be a successful programme receiving the 2016 Circular Award from the World Economic Forum. Read the full Policy Fact Sheet **Luxembourg - Environmental Waste Management Quality** Label Luxembourg's SuperDrecksKëscht fir Betriber (SDK) is a recognised quality label granted to businesses that have adopted **European Construction Sector** an environmentally friendly waste Observatory management plan. The SDK for Business scheme offers free assistance and guidance to businesses to help them develop a waste management plan focused on waste prevention, reuse, recycling, recovery and disposal. By the end of 2020, the total number of SDK labelled businesses reached 3,280, an increase of 0.3% from the previous year. The SDK waste prevention approach has helped to reduce paper consumption by 48% since 2016. The programme has a rating of five stars as a transferrable measure to other countries. Read the full Policy Fact Sheet **Portugal - Sustainable Buildings Programme** The Sustainable Buildings Programme (SBP-Programa de Apoio Edifícios +Sustentáveis) was launched in September 2020 as part of the Economic and Social Stabilisation Programme. It **European Construction Sector** provides grant funding to support energy Observatory and resource-efficient building renovations and improve the energy performance of Policy fact sheet buildings in Portugal. Applicants for the grant must be natural persons that own single-family houses, apartments or apartment buildings. Phase I was initially allocated a budget of EUR 4.5 million, which was later increased to **EUR 9.5 million** because of the programme's popularity. Phase II, which is ongoing, has a budget of EUR 30 million to help with the energy transition and the objectives of the European Green Deal. Read the full Policy Fact Sheet **Romania - Green Building Professional Training and Certification Programme** The **Green Building Professional Training and** Certification (GBP) Programme is designed to provide trainees from construction and **European Construction Sector** construction-related professions with Observatory multi-disciplinary training on sustainable green buildings and construction. The non-profit organisation, Romania Green <u>Building Council (ROGBC)</u> provides certification to those who finish all ten modules, as it formally recognises their competencies as Romanian specialists. Since 2010, the GBP programme has created a community within the construction sector and motivates the stakeholders to find **innovative and** sustainable solutions for green buildings in Bucharest, Cluj and Iași. Over 1000 trainees participated and over 120 have received their certification. Read the full Policy Fact Sheet **Sweden - SymbioCity** SymbioCity provides methods, processes and tools for sustainable urban development with an inclusive and holistic approach. The initiative identifies synergies between urban systems to improve living standards, safety, comfort and quality of life for all citizens. The **European Construction Sector** measure emphasises cooperation between Observatory different sectors, civil society, academia, business and other stakeholders throughout the process. SymbioCity has been used **to support** local and regional governments in 20 different city projects (across 8 countries), and capacity development programmes **spanning 15 countries**. It is an innovative and successful measure that proves that welldesigned, sustainable cities can achieve minimal environmental impact and resource use. Read the full Policy Fact Sheet **Country Fact Sheets** Six updated Country Fact Sheets are now available for download, focusing on the construction markets in Czech Republic, Finland, Greece, the Netherlands, Portugal and Slovenia. The reports provide an analysis of key figures, macroeconomic indicators, economic drivers, issues and barriers, innovation and the national/regional policy and regulatory framework. **Country Fact Sheet Czech** Republic In its 2021-2026 Recovery and Resilience Plan (RRP), the Czech Republic allocated EUR 141 million, EUR 450 million and EUR 650 million respectively, towards investing in recycling infrastructure and supporting circular **European Construction economy** solutions. One of the major changes **Sector Observatory** announced in 2020 included the adoption of the national strategy "Circular Czech Republic **2040**". Although the country showed strong performance in eco-innovation activities, their score for resource efficiency was significantly lower. To address energy efficiency, the government launched the "Insulation Programme" that provides interest-free loans for the **energy modernisation** of apartment buildings, with the aim of **reducing consumption by 20%.** Other programmes include New Green Savings Programme 2014-2021, EFEKT Programme 2017-2021, the Joint Boiler Replacement Scheme and the Reasonable Energy Saving Programmes. **Download the Country Fact Sheet Country Fact Sheet Finland** Finland's Recovery and Resilience Plan has the long-term target of phasing out oil heating by the beginning of 2030 and to reduce **CO2** emissions from the building stock by 90% between 2020 and 205 0. A part of the expected **European Construction** EUR 2 billion of investments will target low-rise Sector Observatory residences. The fourth National Energy Efficiency Action Plan (NEEAP-4), launched in 2017 and extended until 2025, continues to support energy audits of existing buildings and energy consumption monitoring while facilitating access to energy-efficient equipment and systems. To support sustainable construction further, the Finnish Ministry of the Environment launched a project in 2005 -Energy Efficient Home (Energiatehokas koti)—to advise contractors about how to achieve, or get closer to, zero energy-use in construction. Download the Country Fact Sheet **Country Fact Sheet Greece** The National Energy and Climate Plan (NECP) 2019 focuses on measures addressing energy consumption (buildings are responsible for about 40%), mostly through the construction and transport sectors. They encourage the use **European Construction** of renewable energy systems (RES) for Sector Observatory heating, cooling and electricity needs. In March 2021, Greece introduced its <u>long-term</u> renovation strategy. It is based on the latest available data about the country's building stock (2011) and takes into consideration the age and number of buildings, the climatic zones in which they are located, and their energy consumption levels and characteristics. The strategy will make subsidies available for upgrades to building or building unit insulation, energy autonomy interventions, and installation of charging points for electric vehicles. **Download the Country Fact Sheet Country Fact Sheet Netherlands** The Netherland's Energy Agreement for Sustainable Growth, signed in 2013, is comprised of over 40 participants, including 36 of the largest Dutch municipalities. Its goal is to create at least 15,000 construction and installation jobs per year, while pushing for energy-saving construction work. From 2017 to Sector Observatory 2020, the country's renewable energy production grew by 70%, assisted by the <u>Sustainable Energy Production Incentive</u> scheme (SDE++) and offshore wind energy policy. The National Energy Saving Fund (Nationaal Energiebespaar fonds - NEF), set up under the Energy Agreement, has **allocated** EUR 1 billion for housing renovation aimed at reducing energy consumption. Download the Country Fact Sheet **Country Fact Sheet Portugal** Portugal has a number of measures in place to improve resource and energy-efficiency. The main measures are the National Efficiency **European Construction** Action Plan 2017-2021 (Plano Nacional de Ação **Sector Observatory** para a Eficiência Energética – PNAEE) and the National Energy and Climate Plan 2021-2030 (Plano Nacional Energia e Clima – PNEC 2030). To help support PNAEE, the Energy Efficiency Fund was created to co-finance up to 50% of the cost of insulation interventions, up to a maximum of EUR 1,500 for roofs and EUR 3,000 for facades (funds of EUR 1 million available in total). The energy certification of buildings became compulsory in 2013, with a reduction in cost in 2016 to encourage households and SMEs to invest in it. **Download the Country Fact Sheet Country Fact Sheet Slovenia** Slovenia's long-term strategy to promote investment in energy renovations of buildings includes: (i) reducing the final energy consumption by 30% by 2030; (ii) increasing the **European Construction** share of renewable energy in buildings to at Sector Observatory least two-thirds; (iii) **reducing greenhouse gas** emissions in buildings by 70% by 2030; and (iv) renovating 1.3 to 1.7 million square meters of building area per year, including one third of nearly zero energy buildings. To achieve these objectives, an estimated EUR 6.7 billion of investment will be needed until 2030, or about EUR 350-450 million per year. Under its EUR 2.5 billion 2021-2026 Recovery and Resilience Plan (RRP), Slovenia allocated EUR 146 million towards renewable energy and energy-efficiency, EUR 86.1 million for sustainable renovation of buildings as well as EUR 48 million for the circular economy. **Download the Country Fact Sheet Construction News and Events** Construction is changing rapidly, with new business models, concepts and technologies being introduced to best respond to new demands and requirements. To keep you aware, please find below a quick summary of news and upcoming events. **Construction News Scenarios for a transition** pathway for a greener, more digital and resilient construction ecosystem The Commission prepared a Staff Working Document to outline possible scenarios for a transition pathway for a more resilient, green and digital construction ecosystem. This Staff Working Document invites the whole ecosystem to collaborate and propose concrete actions. Participate in the consultation **Delivering the European Green Deal - Commission proposes to** boost renovation and decarbonisation of buildings Through the "Delivering the European Green **Deal Package**", the Commission proposes to

> INTERNATIONAL COST MANAGEMENT STANDARD life cycle costs and carbon emissions An international coalition has launched the third edition of the International Cost Management Standard (ICMS) for construction works. Following the first two editions which addressed a global voluntary standard for measuring and reporting construction costs and life cycle costs respectively, the third edition expands this to include carbon emissions. The ICMS coalition is a non-profit, non-governmental group of 49 professional organisations. Read the full Report The Life for Level(s) project To mainstream a life-cycle approach and help the construction sector reduce the total environmental impact of the buildings it invests in, designs, builds, occupies and deconstructs, the European Commission created Level(s). This is a framework of common EU indicators to address the life-cycle environmental performance of buildings. Developed with hundreds of actors from industries,

Launch of ICMS 3: construction

revise the Energy Performance of Buildings Directive, setting the vision for achieving a zeroemission building stock by 2050. The revision proposes the gradual introduction of minimum energy performance standards to trigger renovation of the lowest-performing buildings, a more ambitious vision for new buildings, Building Renovation Plans to replace the longterm renovation strategies, increased reliability

of Energy Performance Certificates,

and better energy system integration,

modernisation of buildings and their systems,

introduction of building renovation passports.

Read more

governments and NGOs, Level(s) is focussed on

emissions; resource efficiency; water efficiency; health and wellbeing; adaptation and resilience; and life-cycle cost and value. The European network of Green Building Councils (GBCs) have been working together to mainstream Level(s).

Read more

Circular Trailblazers: Scale-Ups

Leading the Way Towards a

The report from the World Economic Forum emphasises the need for more scale-ups to become leaders in resource and energy efficiency. They stress the importance of

More Circular Economy

six key areas: life-cycle greenhouse gas

Public Consultation: A Drone Strategy 2.0 for a smart and European sustainable unmanned aircraft Commission eco-system in Europe The Commission is currently developing "A Drone Strategy 2.0 for a smart and sustainable unmanned aircraft eco-system in Europe". Building on the policies and regulatory framework already in place at EU level in this area, this public consultation aims to gather information and feedback from the most relevant stakeholders and from the wider public as to how the EU Drone Policy can contribute to a new offer of sustainable aerial services and transport. This consultation should help to identify the steps that could be taken to support a wider use of drones and the concerns that would need to be addressed by EU public intervention to ensure a safe, efficient and sustainable development of a drone ecosystem. Consultation period closes on 31 December, 2021.

View Consultation Specifications

Circular Trailblazers: ale-Ups Leading the

Way Towards a More Circular Economy

trailblazers sharing their story and insights as well as collaborating with other firms and policy-makers to lead the construction industry to change. The report outlines the tactics that trailblazers are encouraged to use together with the need for ecosystem support and concludes with how circular trailblazers can be supported. In order to meet UN's Sustainable Development Goals, the next ten years must be a "decade of action". Download the full Report **Upcoming Events Smart Building Conference 2022**

BUILDING CONFERENCE

31 January 2022, Barcelona, Spain

The Smart Building Conference (SBC) is a full day in-person event produced by Integrated Systems Events. The conference serves as a platform for building automation, in-building technologies, and at least 12 categories of smart building technology. SBC will be attended by traditional leaders who can

share their visions, and start-ups who can introduce themselves. Tickets range from EUR 280 to EUR 400. Find out more **Register here** European Construction Sector Observatory

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