

European Commission

European Construction Sector Observatory  
Providing valuable insight on the European construction industry

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## 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 the [ECSO website](#) and gain access to a wide range of industry data and analysis. ECSO contains all the information you need to stay up to date with the latest news and practical analyses about the construction sector in Europe.

**28 Country Fact Sheets, 115 Policy Fact Sheets, 6 Analytical Reports and 3 Trend Papers are now online.**

IN THIS NEWSLETTER YOU WILL FIND:

- 5 Updated Country Fact Sheets
- 5 New Policy Fact Sheets
- Construction news and events

## Digitalisation in construction

The construction sector has a crucial role in the economy, however, is one of the least digitalised sectors. Implementation of digital solutions is uneven in Europe but growing steadily because of the uptake from the industry and the push from the policymakers. Automation and digitalisation of the construction sector have a potential to increase the productivity, efficiency and improve the image of the construction sector.

Updated Country Fact Sheets are online

Five updated Country Fact Sheets are now available for download, focusing on the construction markets of **Bulgaria, Denmark, Italy, Poland and the United Kingdom**. The reports provide an analysis of key figures, macroeconomic indicators, economic drivers, issues and barriers, innovation, the national/regional policy and regulatory frameworks, and each current status and national strategy to meet Construction 2020 objectives.



### Country Fact Sheet Bulgaria

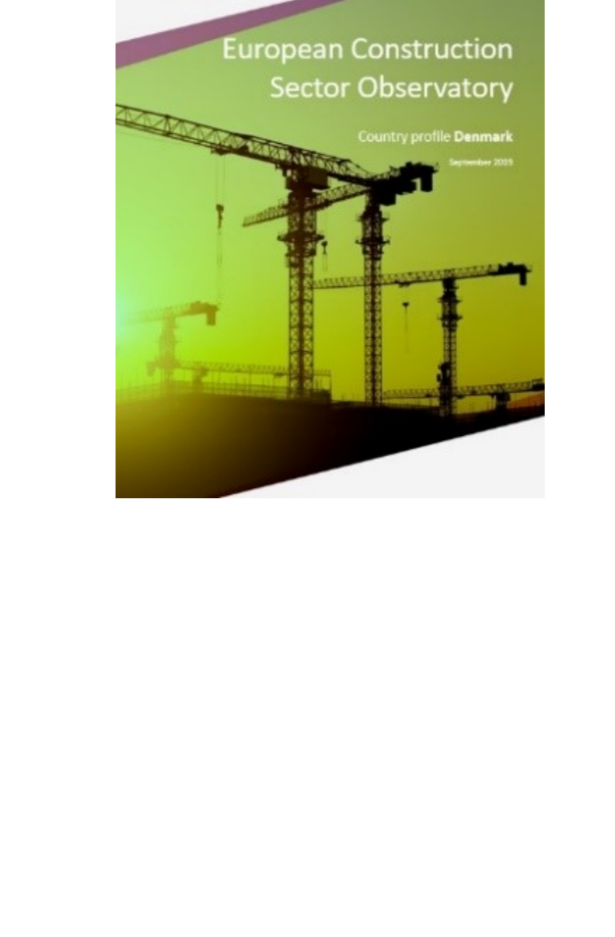
According to the 2018 Digital Economy and Society Index, Bulgaria can improve in the area of digitalisation, compared with other EU countries. To reduce this gap, in 2017 the Bulgarian authorities introduced the **"Digital Transformation of Bulgarian Industry - Industry 4.0"** strategy to support digitalisation. Building information technologies have been developed by **coBuilder and Nemeschek projects** to accelerate the digitalisation process. BIM has been promoted through specific events to inform the relevant stakeholders involved in the construction industry. Read more on the construction sector of Bulgaria in the updated Country Fact Sheet.

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### Country Fact Sheet Denmark

Denmark ranks the highest in the EU regarding BIM adaptation as it has started programmes for the digitalisation of construction skills. This is supported by public procurement that requires the use of BIM for regional and local projects with a budget above EUR 2.7 million, and for central government projects with a budget above EUR 677,000. In 2017, **BulgeBakker Spøelfond**, a housing association, introduced its digitalisation strategy, aiming to save DKK 10 million (EUR 1.4 million) by improving the productivity of the sector. According to Dansk Industri, larger Danish companies have progressively implemented virtual design and construction- extensions of BIM and 3D technology - improving financial efficiency. In 2018, the government launched the **Strategy for Digital Construction** to increase the productivity in the sector. Learn more about digitalisation of the Danish construction sector in the new Country Fact Sheet.

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### Country Fact Sheet Italy

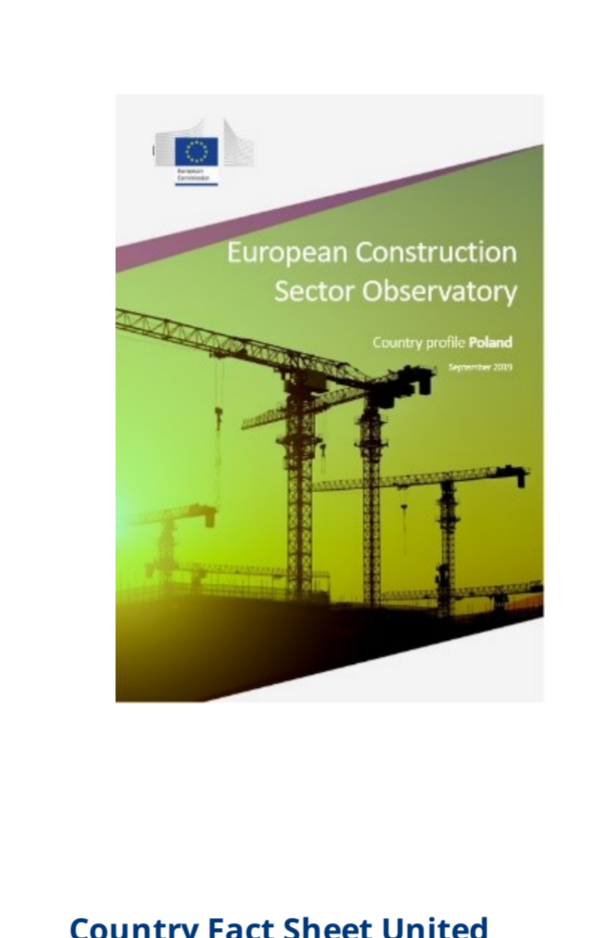
The Italian Ministry of Economic Development launched the Industry 4.0 National Plan in 2017, to boost new technologies. A new Digital Service Tax was introduced in Italy from mid-2019. Furthermore, in 2019 the Italian government committed funds for implementation of new innovative technologies (Blockchain, Internet of Things (IoT) and Artificial Intelligence (AI). **UN 1133x and the BIM Decree** regulate the inclusion of BIM in the construction industry. By 2020, BIM will become mandatory for any complex projects with a budget of EUR 50 million or more. From 2025, it will become mandatory for all construction projects to use Building Information Modelling (BIM) to digitalise the construction sector. Read more on the future of the construction sector in Italy in the updated Country Fact Sheet.

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### Country Fact Sheet Poland

The development of the Polish construction sector in terms of digitalisation, new technology and automation - especially in the MSME segment - is limited. Slow uptake of new technologies creates additional barriers to the productivity (and competitiveness) of the sector to grow. Although the Polish government recognises the issue, most of the public initiatives in the last decade focus on energy efficiency and sustainable construction, rather than purely on digitalisation. Read more on the future of the Polish construction sector in the updated Country Fact Sheet.

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### Country Fact Sheet United Kingdom

The **Government Construction Strategy 2016-2020** was established by the Infrastructure and Projects Authority in March 2016. The integration and development of digital construction processes such as Building Information Modelling (BIM) formulate parts of the policy strategy in achieving efficiency savings worth GBP 7.2 billion (EUR 2.0 billion). Since 2016, the Strategy resulted in a requirement for **all centrally-procured construction projects in the UK to achieve BIM level 2**. BIM, however, remains less affordable to SMEs, compared with larger companies, as its implementation requires additional costs related to upskilling of workers. Read more about UK's construction sector prospects in the updated Country Fact Sheet.

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## Policy Fact Sheets

Five new Policy Fact Sheets (PFS) are now available to download, focusing on policies from Austria, Finland, Lithuania, Romania and Spain. The reports provide an analysis of five national policies influencing the development of the construction sector.



### Austria - City of Tomorrow

To deal with the urban sustainability challenges in Austria, the Federal Ministry of Transport, Innovation and Technology launched in 2013 the RTD programme "City of Tomorrow" (CoT). The programme is forecasted to run for five years with a total budget of **EUR 25.1 million**. It aims to research and develop urban technologies, systems and services for sustainable and future-oriented cities. **Over 140 projects have been funded since 2013**. Based on the success of the CoT programme, similar projects have been implemented in other countries. Read more on City of Tomorrow in the new Policy Fact Sheet.

[Download the Policy Fact Sheet](#)

### Finland - Housing First

The Finnish government tackles homelessness through the Housing First initiative, first established in the United States. **The new model was widely considered a success**, in contrast to the "staircase model", as it worked to house more fragile groups, increased the housing stock and dramatically reworked the structure of the state-owned housing stock. Finland is the only EU Member State that managed to reduce the level of homelessness through the Housing First initiative. To learn more, read the full report in the updated Policy Fact Sheet.

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### Lithuania - Multi-Apartment Renovation Programme

Lithuania is, compared to its Nordic neighbours, a high energy consumer. To tackle this, in 2015 the Ministry of Environment implemented the Multi-Apartment Building Renovation Programme to increase the energy efficiency of the existing building stock. **The programme focused on multi-apartment building renovation programmes and is forecast to achieve over 75% of its renovation targets by 2020**. Once fully completed, it will result in an increase of 19% of building renovation projects.

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### Romania - Build Up Skills QualiShell Project

The Nearly Zero Energy Building concept has not been widely implemented in Romania. Build Up Skills QualiShell project with a total budget of **EUR 511,000** was launched in 2013 to accelerate the NZEB process. The project aimed to develop two National Qualification Schemes for installers of opaque thermal insulation systems and installers of thermally insulated window. QualiShell was successfully implemented resulting in **two qualification schemes and 11 partnership agreements** between training providers and construction sector businesses. Learn more about the QualiShell Project in the new Policy Fact Sheet.

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### Spain - Sustainable Construction Programme in Andalusia

The Sustainable Construction Programme (PICS) sought to bolster the construction sector and lay the foundation to a new model based on energy efficiency, environmental protection and balanced urban development through the renovation of buildings already in use. A key objective of the programme was to promote energy saving and energy improvements in Andalusian buildings. **The programme intended to support 68,000 energy efficiency renovations and 10,000 collaborating companies**, leading to a reduction in CO2 emissions of about 168,000 tonnes a year. The program is still in high demand and initiated a dialogue about sustainable construction in the region. Read more about the success of the Sustainable Construction Programme in the new Policy Fact Sheet.

[Download the Policy 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 fresh news and upcoming events.

### Fresh Construction News

**Study on supporting digitalisation of the construction sector and SMEs is published**

This new report published on behalf of the European Commission on Critical gaps in the digitalisation of construction SMEs is now available online. The Study focuses on the digitalisation technologies relevant for the construction sectors, including BIM, state of play and market penetration of digitalisation technologies. It provides an analysis of gaps in the digitalisation of the construction sector and suggests a roll-out plan for the policy maker who is on the uptake of new technologies for construction.

[Read more](#)

**JRC publishes a report on the digital transformation in construction**

A new policy report published on behalf of the Joint Research Centre providing analysis into digital transformation covering different policy areas including construction, energy, government and public administration. For each of the four sectors, the report presents an overview of digital transformation and analysis its drivers, barriers and impacts. The report puts forward recommendations for policymakers and future research.

[Read more](#)

**DigiPLACE is set up to develop a Reference Architecture Framework for digital construction**

DG CONNECT has recently launched a new project to support the digital transformation of the construction sector. The project called DigiPLACE brings together 19 partners from 11 countries led by Politecnico di Milano. DigiPLACE aims to tackle issues of low capitalisation, a lack of skilled employees, low investment in innovation, and a long supply chain in the construction sector. DigiPLACE will define a Reference Architecture Framework for digital construction platform in the EU.

[Read more](#)

**New study on the EU Framework for a Building's Digital Logbook**

The work on an EU Framework for a Building's Digital Logbook, kicked off in Brussels on 16 January 2020. The study will run until December 2020, starting with analysing existing national and sectoral schemes, with wide stakeholder participation in the steering of it.

### Upcoming events

**Digital Construction and BIM in Greece**  
| 19 February | Greece

Digital Construction and BIM in Greece is the EU BIM Task Group national event organised by the Technical Chamber of Greece. The event will present the status of BIM in Europe and the opportunities that occur from its use, European practices and experiences, governmental policies, technical standards and issues regarding the implementation of BIM will be discussed. Furthermore, event features a session dedicated on mapping the needs and difficulties in implementing BIM in Greece.

[See more](#)

**Construction, real estate and infrastructure into the digital era**  
| 31 March - 01 April | France

EU BIM WORLD organises a conference on digitalisation in construction, real estate and infrastructure, which will take place on the 31st March-1st April in Paris. The purpose of the event is to bring together 12,000 participants, 350 exhibitors and 1,500 panelists to discuss the digitalisation transformation of the sector. In parallel, EU BIM Task Group is organising a dedicated workshop for the use of BIM in Public Procurement, featuring speakers from the European Commission.

[See more](#)

**Hannover Messe**  
| 20 - 24 April | Germany

Hannover Messe is one of the most important industrial trade fairs in the world. The 2020 edition of the show will be staged from the 20th to 24th of April at Hannover Fairground. Within the event's frame, 10 concurrent expos will be held. Over 240,000 square metres exhibition space will welcome 225,000 international trade professionals which will have the opportunity to explore the new technology, future developments and services of more than 6,500 exhibitors. Some of the core themes of the event are: Predictive maintenance • Adaptive maintenance • Industry 4.0 • Smart materials and components.

[See more](#)

**European BIM Summit**  
| 28 - 29 May | Spain

The European BIM Summit has become the most advanced reference meeting on construction digitalisation in Europe. The objective of the event is to spread good practices of using BIM. The event is organised by CENATEC, BIM Academy and Building Smart Spanish chapter. The 2020 congress has reworked its format and content to fit in with this new landscape. The event is expected to gather more than 250 speakers from 40 countries and more than 2,600 participants.

[See more](#)