




Dear subscribers,

The ECSO Team wishes you happy winter holidays and good start of the year! May 2021 be filled with peace, health and happiness!

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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, 145 Policy Fact Sheets, 7 Analytical Reports and 3 Trend Papers are now online.

IN THIS NEWSLETTER YOU WILL FIND:

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






Resource and energy efficiency in the construction sector

Buildings account for a large percentage of energy consumption and greenhouse gas emissions in the EU. As part of the **Renovation Wave Strategy**, the EU is committed to at least double the current annual deep renovation rate of residential and non-residential buildings, and to encourage circular approaches over the whole life cycle. If together we achieve this goal, the EU objective to be carbon-neutral by 2050 could very well become a reality. This newsletter therefore investigates some of the initiatives and trends related to resource and energy efficiency in several European countries.

Updated Country Fact Sheets are online

Six updated Country Fact Sheets are now available for download, focusing on the construction markets in Bulgaria, Denmark, Italy, Poland, Slovakia and the United Kingdom. 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 Bulgaria



Construction and demolition activities in Bulgaria produce an increasing amount of waste. To address this issue and foster resource efficiency, Bulgaria responded with the development of a **'pay-as-you-throw'** programme for construction companies, starting in 2022. At the same time, the government has been active in upgrading the national waste management system. As part of this endeavour, the European Commission approved earlier this year a EUR 77.0 million ERDF investment to upgrade the integrated **waste management system** in the city of Sofia. The objective is to construct a highly efficient plant for producing heat and electricity while using fuel derived from unrecyclable municipal waste. Read more about the future of the construction sector in Bulgaria in the [new Country Fact Sheet](#).

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Country Fact Sheet Denmark



Committed to support its **sustainable development**, the Danish government developed several measures to support the construction sector in going green and sustainable. The government has notably made significant investments in **green building** initiatives that emphasise energy and resource efficiency. In parallel, the government developed a strategy for **energy efficiency and renovation** "road to energy efficient buildings in the Denmark of the future", which aims to reduce energy consumption (mainly through improving existing heating systems) by 29% by 2050. Read more about the future of the construction sector in Denmark in the [new Country Fact Sheet](#).

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Country Fact Sheet Italy



Buildings still represent a major source of CO2 emissions in Italy, accounting for 19% of the energy-related CO2 emissions in 2018. To **improve the energy efficiency** of the current building stock, Italy is pushing towards sustainable construction and renovation. In April 2020, it adopted the **Superbonus 110%** – a fiscal measure providing a tax credit amounting to 110% to households for energy efficient and seismic related renovation. Launched in June, this scheme planned implementation is meant to last until December 2021, and could potentially generate up to **EUR 5 billion of investments**. Discover more about the Italian construction sector and the measures put in place to support resource and energy efficiency in the [new Country Fact Sheet](#).

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Country Fact Sheet Poland



The Polish government developed several initiatives to support investment in energy efficient construction and renovation. One such programme is the **"Energy efficient construction industry: Reduction of energy consumption in the construction industry"**. With a budget of PLN 1.13 billion (approx. EUR 252 millions), it provides financial support for the renovation of public and private buildings. Similarly, the **Thermal Upgrade and Refurbishment Fund (Fundusz Termomodernizacji i Remontów)** awards premiums helping pay back up to 20% of the loan for thermal upgrade or refurbishment of residential buildings. The programme helped to save approximately **PLN 900.0 million (EUR 200.1 million)** on energy costs by the end of 2015. Read more about the future of the construction sector in Poland in the [new Country Fact Sheet](#).

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Country Fact Sheet Slovakia



Slovakia's Energy Policy is consistent with the EU goals for energy and is translated in the fourth National Energy Efficiency Action Plans. The country's target is to annually **renovate 3% of the total floor area of buildings owned and occupied by all public buildings**. To do so, the National Energy and Climate Plan estimates that investments amounting to **EUR 3 billion** will be required by 2030. Residential buildings are also being targeted through a scheme to support thermal insulation and financial support to the thermal performance of residential buildings. Read more about the future of the construction sector in Slovakia in the [new Country Fact Sheet](#).

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Country Fact Sheet United Kingdom



The UK construction sector is considered as a key vector to meet future energy efficiency targets. The government has recently published a new **"Future Homes Standard"** requiring new homes to have reduced energy consumption and to be fitted with clean heating technologies rather than fossil fuel heating systems starting from 2025. By introducing these standards, the government hopes to **cut greenhouse gas emissions by 80% in new homes**. The UK policy framework puts the environment at the heart of every construction project, with the hopes that it will put pressure on developers, house builders and multi-tenure landlords to upgrade their properties and make them more sustainable. Read more about the future of the construction sector in the United Kingdom in the [new Country Fact Sheet](#).

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Policy Fact Sheets

Five new Policy Fact Sheets (PFS) are now available for download, focusing on policies in Cyprus, Denmark, France, Luxembourg and Poland. The PFS provide an analysis of five national policies influencing the development of the construction sector in the area of resource and energy efficiency.

Cyprus - I Save, I Upgrade



The **"I Save, I Upgrade"** Programme (2014-2020) was launched to promote major energy renovations, by providing households with non-repayable financial aid. With a budget of EUR 18.4 million, the initiative aimed to improve energy efficiency in buildings by at least 50%. A total of 2,369 applications were submitted, contributing to **energy savings of 1,928 kWh/m²/year**. Read more about the "I Save, I Upgrade" Programme in the [new Policy Fact Sheet](#).

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Denmark – Innovation network for sustainable construction - InnoBYG



InnoBYG is an **innovation network** setting the sustainable and energy efficient construction agenda. It aims to promote, coordinate and streamline construction sector innovation, and to boost innovation, competition and growth within construction companies and the industry. It is financed in part by public funding with matching funds from private sources. Membership in the network has been steadily increasing since its launch, along with successful innovative ideas. To date, it has supported **59 innovation projects** (47 completed and 12 ongoing) involving over 230 businesses. Read more about InnoBYG in the [new Policy Fact Sheet](#).

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France – Recognised Environmental Guarantor Label (RGE)



The French Government and a group of professional organisations, training providers and certification bodies launched the **Recognised Environmental Guarantor (Reconnu Garant de l'Environnement)** certification and labelling system almost a decade ago. The initiative's goal is to **improve energy efficiency in residential renovation projects**. Through the establishment of the RGE certification as a pre-requisite for energy efficiency renovations, they hope to incentivise construction companies to develop their skills, give access to green loans, and help customers select competent contractors. As a result, over **67,500 companies hold an RGE certificate**, with an average of 11,250 energy efficiency projects per year. Read more about RGE in the [new Policy Fact Sheet](#).

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Luxembourg – Wood Cluster



The **Luxembourg Wood Cluster** was created in 2016 as an exchange platform for the numerous companies in Luxembourg working directly or indirectly with wood. The initiative has several objectives. The first of which is to promote the use of wood as a sustainable resource in construction projects. The second is to **promote product and process innovation, in turn improving resource efficiency**. To achieve these objectives, the cluster provides companies with research and development strategies and set up collaborative projects with research centres. To date, the cluster has about **125 member companies and 51 strategic partners**. Read more about the Luxembourg Wood Cluster in the [new Policy Fact Sheet](#).

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Poland - Energy Saving Construction Programme (ESCP)



The **Energy Saving Construction Programme (ESCP)** was set up to incentivise the construction of newly built homes that comply with EU building energy performance directives and regulations. The ESCP gave households the opportunity to access lower or higher **grants to build or purchase energy efficient or passive homes**, depending on the energy-saving standards achieved by their proposed project. Unfortunately, the programme did not achieve its objectives partly because the grants offered were not proportional to the level of investment potential beneficiaries were expected to make. Read more about the Energy Saving Construction Programme (ESCP) in the [new Policy Fact Sheet](#).

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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

2020 report on State of the Energy Union: updates on different aspects of EU energy policy




The 2020 State of the Energy Union report focuses on various aspects of the EU energy policy since the adoption of the **European Green Deal**. Notably, it reviews the Energy Union's contribution to long-term climate goals in Europe. There are five dimensions of the energy union.

They are decarbonisation, the internal energy market, security of supply and research, innovation and competitiveness.

Decarbonisation encompasses energy efficiency, which is most relevant to the construction sector. The report evaluates the progress made in each dimension with a view on the future. It is accompanied by several other reports and annexes on the subject. Read the full report [here](#).

[Read more](#)

Energy-efficient building renovation: a Franco-German challenge



To achieve climate neutrality by 2050, the question of renovating buildings to be more energy-efficient is of crucial importance. More than ever before, it is the subject of debate on both sides of the Rhine. This Euracity report shows some of the **main challenges** and governmental measures adopted in France and Germany to tackle the issue of **energy efficiency** – revealing some lessons learnt, which may be useful for other EU countries.

Read the full article [here](#).

[read more](#)

EIB and Gmp join forces to promote investment in sustainable buildings in Madrid



The European Investment Bank (EIB) and GMP PROPERTY SOCIEMI (Gmp), one of Spain's biggest real estate groups, are set to finance **green investments** in Madrid, reducing energy consumption and CO2 emissions in office buildings.

To this end, the EU bank will provide the Spanish company with €28 million in financing for the development of **near zero energy buildings (NZEBs)** and for refurbishments works aimed at improving energy efficiency. The operation is supported by the European Fund for Strategic Investments (EFSI), the main pillar of the Investment Plan for Europe. Read the full article [here](#).

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