



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!

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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 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 insights 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:**

**5 New Policy Fact Sheets**



**6 Updated Country Fact Sheets**



**Scenarios for a transition pathway for a greener, more digital and resilient construction ecosystem**



## Energy and resource efficiency in the construction sector

With the EU's 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 EUMS 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 framework to enable the construction sector to **work with and manage materials more sustainably**, based on the circular construction concept. The programme was launched in 2015 by the Public Waste Agency of Flanders (OVAM), and over **90% of construction and demolition waste** was recycled as a result. SCMP focuses on: i) Selective demolition and dismantling; ii) Closing the stone waste loop; iii) Closing the non-stone waste loop; iv) Design for change. It has proven to be a successful programme receiving the 2016 Circular Award from the [Economic Forum](#).

[Read the full Policy Fact Sheet](#)

### Luxembourg - Environmental Waste Management Quality Label

Luxembourg's SuperDrecksKesch fir Beibier (SDKB) is a recognised quality label granted to businesses that have adopted an **environmentally friendly waste 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 SDKBs** in the country reached **1,200**, 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 transferable 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 provides **grant funding to support energy and resource-efficient building renovations** and improve the energy performance of 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. **SBP2021**, 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 (GBPTC) Programme** is designed to **provide trainees from construction and construction-related professions with multi-disciplinary training on sustainable green buildings** and construction. The non-profit organisation **Romania Green Building Council (RGCBC)** provides certification to those who finish all ten modules, as it formally recognises their competencies as Romanian specialists. Since 2016, the GBPTC 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 Iasi. **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 measure emphasises cooperation between 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 6 countries), and **capacity development programmes spanning 15 countries**. It is an innovative and successful measure that proves that well-designed, 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, Ireland, 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 investments in **resilient infrastructure and supporting circular economy** solutions. One of the major changes announced in 2020 included the adoption of the national strategy **"Circular Czech Republic 2030"**. 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 2016-2020**, **EEFIT Programme 2017-2020**, the **Public Buildings Scheme**, and the **Reasonable Energy Saving Program**.

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### 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 2050. A part of the expected EUR 2 billion of investments will target low-rise residences. The fourth National Energy Efficiency Action Plan (NEEAP-4), launched in 2017 and extended until 2023, 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 (Energia- ja lämmityskäyttö)** - to advise contractors about how to achieve, or get closer to, zero energy-use in construction.

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### 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 renovation sectors. They encourage the use of **renewable energy systems (RES) for heating, cooling and electricity** needs. In March 2021, Greece introduced its **Energy Efficiency Action Plan (EEAP)**. It is based on 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 units, insulation, energy efficiency renovations, and installation of charging points for electric vehicles**.

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### Country Fact Sheet Netherlands

The Netherlands Energy Agreement for Sustainable Growth, signed in 2013, is comprised of over 40 participants, including 36 of the largest Dutch municipalities, to **goal to create at least 15,000 construction and installation jobs** per year, while pushing for energy-saving construction work. From 2017 to 2020, the country's **renewable energy production grew by 70%**, assisted by the **Sustainable Energy Production Incentive Scheme (SPEI)** and offshore wind energy policy. The **National Energy Savings 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 Action Plan 2017-2021 (Plano Nacional de Ação 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 **finance up to 90% of the cost of insulation interventions**, up to a maximum of EUR 1,500 for roofs and EUR 3,000 for facades (units 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.

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### 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 2020**, (ii) increasing the share of renewable energy in buildings to at least two-thirds; (iii) **reducing greenhouse gas emissions in buildings by 70% by 2030**; and (iv) **renovating 1.5 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 Resilience Plan (RRP), Slovenia allocated **EUR 140 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 revise the Energy Performance of Buildings Directive, setting the vision for achieving a zero-emission 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 long-term renovation strategies, increased reliability of Energy Performance Certificates, modernisation of buildings and their systems, and better energy systems integration and introduction of building renovation passports.

[Read more](#)

#### Launch of ICMS 3: construction 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 constructs, 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 industry, governments and NGOs, Level(s) is focused on six key areas: life-cycle greenhouse gas emissions; resource efficiency; water efficiency; health and wellbeing; adaptation and resilience; and life-cycle cost and value. The **Level(s) Action Plan** and **Guidelines** (ENCL) have been working together to mainstream Level(s).

[Read more](#)

#### Public Consultation: A Drone Strategy 2.0 for a smart and sustainable unmanned aircraft 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: Scale-Ups Leading the Way Towards a More Circular Economy

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 trailblazers sharing their story and insights as well as collaborating with other firms and policymakers 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



**31 January 2022, Barcelona, Spain**

The Smart Building Conference (SBC) is a full day in-person event produced by Integrative Systems Events. The conference serves as a platform for building automation, 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](#)

