



Subscribe to ECSD updates

The European Construction Sector Observatory

The **European Construction Sector Observatory (ECSD)** 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. **ECSD** 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, **170 Policy Fact Sheets**, **9 Analytical Reports**, **3 Trend Papers** and our [updated website](#) are now online.

IN THIS NEWSLETTER YOU WILL FIND:

- 4 New Policy Fact Sheets**
- 6 Updated Country Fact Sheets**
- Launch of the High Level Construction Forum**

Investment and digitalisation in the construction sector

Following the implementation of EU policy initiatives such as the Renovation Wave, and the recent publication of the agreed EU Member States Recovery and Resilience Plans, significant investments are expected to flow into the EU construction sector. These investments are not an end in themselves but rather a means to achieve the green objectives of the EU and its Member States. By supporting investments in the construction sector, policy-makers hope to foster its competitiveness and decarbonisation. Digital technologies play a key role in facilitating such a green and sustainable transition. This newsletter describes some of the vital investment and digitalisation initiatives led by governments to support their construction sectors.

Policy Fact Sheets

Four new Policy Fact Sheets (PFS) are now available for download, focusing on policies in Austria, Belgium, Croatia and Spain. The PFS provide an analysis of four national policies influencing the development of the construction sector in the area of investments and digitalisation.

Austria – klima:aktiv Building Standard

klima:aktiv is the Austrian government's **climate protection initiative**. Launched in 2004 as part of the national climate strategy, it aims to **reduce greenhouse gas emissions by increasing the market share of high-quality climate-friendly technologies and services**. As part of it, the **klima:aktiv Building Standard** was developed with a view to support the development of high-quality and energy-efficient new builds and renovations in Austria. In this context, klima:aktiv has certified a total of 104 buildings since 2005, including 81 residential buildings (78%) and 230 non-residential buildings (22%).



[Read the full Policy Fact Sheet](#)

Belgium - Construction 4.0 Initiative (Digital Wallonia)

Construction 4.0, launched as part of the Digital Wallonia initiative, aims to create a **European Digital Innovation Hub** for the Walloon construction sector. The hub focuses notably on the **promotion of digital transformation opportunities**: the provision of resources, tools, advice and support to aid decision-making and guide companies through the process; digital technology demonstrations in a range of construction settings; and **training to help companies access the skills they need to succeed**. Standout results include a Digital Maturity Self-Assessment Tool for construction companies, three construction demonstration hubs (fixed and mobile) and the set-up of the CONNECT European Digital Innovation Hub as a digital transformation one-stop-shop for the Walloon construction sector. Read the full Policy Fact Sheet.

[Read the full Policy Fact Sheet](#)

Croatia - Energy Renovation of Family Houses 2014-2020

The Croatian housing sector accounts for approximately 40% of total national energy consumption. In line with the EU average. Therefore, the goal of the **Energy Renovation of Family Houses 2014-2020 operation** is to **make existing family houses more energy efficient** and reduce their energy consumption and CO₂ emissions. It specifically targets three categories of energy efficient building upgrades: **building envelope renovations (outer shells), heating system replacements; and the use of renewables energy**. The ERHF exceeded its energy saving targets in the first three years of implementation, but is still a short of its targets since 2016.



[Read the full Policy Fact Sheet](#)

Spain – Construction Nanograd 4.0

The **Construction Nanograd 4.0 (CN4.0)** training programme was launched in April 2020 to support the digitalisation of the construction sector. It aims to provide construction sector professionals, those in related sectors, and anyone interested in a construction-related career with free of charge access to horizontal and digital construction skills training. CN4.0 has achieved significant success in less than two years since its launch, in the midst of the COVID-19 pandemic. 34,000 trainees have registered for training in the first three editions of the programme. Trainees have subscribed to a total of 74,000 individual training modules. More than 1,000 trainees have successfully completed all module modules.

[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 Bulgaria, Denmark, Hungary, Italy, Poland and Slovakia. The reports provide an analysis of key figures, macroeconomic indicators, regulatory barriers and barriers, innovation and the national/regional policy and regulatory framework.

Country Fact Sheet Bulgaria

Investment in the narrow construction sub-sector increased by 16.9% from 2019 to 2018, from EUR 1,219.3 million to EUR 1,420.1 million. Such growth is partially explained by the surge in investment in dwellings, which grew by 18.1% over the period 2019-2020. This trend is expected to increase over the next few years, supported by the Recovery and Resilience Plan, as well as other policy measures relating to the field of transport infrastructure and digitalisation. This includes, for instance, Bulgaria's **Governance Programme 2021-2023** and the **Transport Connectivity Programme 2021-2027**. Read more about the future of the construction sector in Bulgaria in the [new Country Fact Sheet](#).

[Download the Country Fact Sheet](#)

Country Fact Sheet Denmark

In March 2021, the Danish Parliament adopted a new **National strategy for sustainable construction** that includes CO₂ reduction requirements from 2023 for buildings larger than 1,000 square meters. The strategy contains **21 different initiatives to promote sustainable solutions** in the construction industry, encompassing issues such as the digitalisation of the building industry, climate friendly materials and intelligent energy management and energy renovations. These elements will be important to realise the benefits expected from the Danish Recovery and Resilience Plan, which places important emphasis on the **sustainable development of the construction and building sectors**. Read more about the future of the construction sector in Denmark in the [new Country Fact Sheet](#).



[Download the Country Fact Sheet](#)

Country Fact Sheet Hungary

While the share of firms in the Hungarian construction sector implementing digital technologies stands at 38%, the lowest share among economic sectors, the digitalisation process of the construction sector is ongoing. For instance, **34.0% of firms report using BIM**, **and 26% the Internet of Things (IoT)**, which is higher than the EU-27 average of 22.0%. Amongst recent projects leveraging digital technologies in Hungary is the **Erzsébet Park Budapest Building**. The 14-storey **Building 11** has been **designed with BIM** (Building Information Modelling), an intelligent 3D-model based process that gives professionals the ability to **plan, design, construct and manage buildings and infrastructure more efficiently**. Read more about the future of the construction sector in Hungary in the [new Country Fact Sheet](#).

[Download the Country Fact Sheet](#)

Country Fact Sheet Italy

Even before the COVID-19 pandemic, the real estate and construction market had witnessed growing interest and demand for **advanced professional and digitalised services**. This includes, for instance, the development of virtual agencies, video conference and video calling tools. Beyond real estate, the Italian construction sector has shown an increased appetite for digital technologies and particularly BIM. The **BIM Decree (DM 560/2017)**, also sometimes referred to as the **Barattino Decree**, played a key role in this respect, by **progressively imposing BIM requirements in public procurement processes**. Further investments in this field and more generally in the construction sector are expected moving forward. Discover more about the Italian construction sector and the investment initiatives driving it in the [new Country Fact Sheet](#).



[Download the Country Fact Sheet](#)

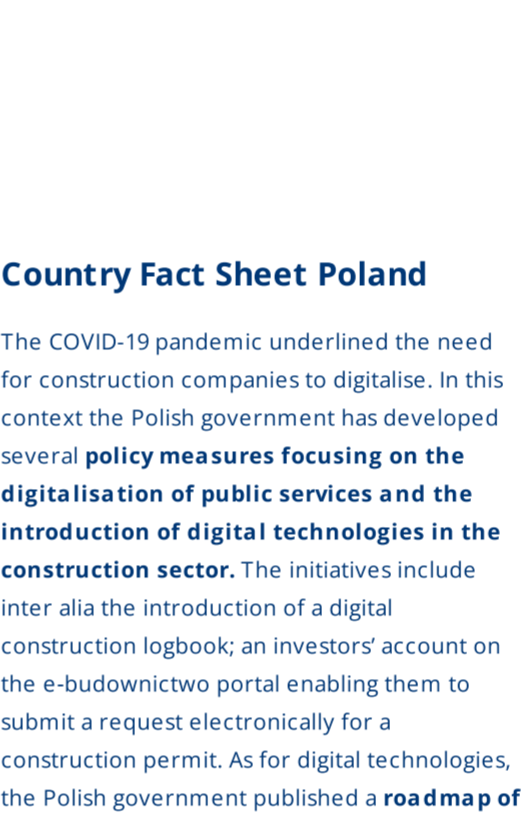
Country Fact Sheet Poland

The COVID-19 pandemic underlined the need for construction companies to digitalise. In this context the Polish government has developed several **policy measures focusing on the digitalisation of public services and the introduction of digital technologies in the construction sector**. The initiatives include inter alia the introduction of a digital construction logbook, an investors' account on the e-Audiamenro portal enabling them to submit a request electronically for a construction permit. As for digital technologies, the Polish government published a **roadmap of BIM implementation for public procurement in Poland**. Read more about the future of the construction sector in Poland in the new Country Fact Sheet.

[Download the Country Fact Sheet](#)

Country Fact Sheet Slovakia

The **Slovak Recovery and Resilience Plan** is expected to dedicate parts of its **funding to decarbonising transport facilities, promoting energy efficiency and investing in innovative decarbonisation technologies** – thus having an impact on the construction sector. Importantly, about 21.0% of the total allocation will be used to support digital objectives and reforms in the country. This includes a **EUR 177.5 million investment** to introduce friendly e-government solutions for citizens and businesses as well as a EUR 140.0 million investment geared towards digitalising businesses, establishing a network of digital hubs and providing training for digital skills. Read more about the future of the construction sector in Slovakia in the new Country Fact Sheet.



[Download the Country Fact Sheet](#)

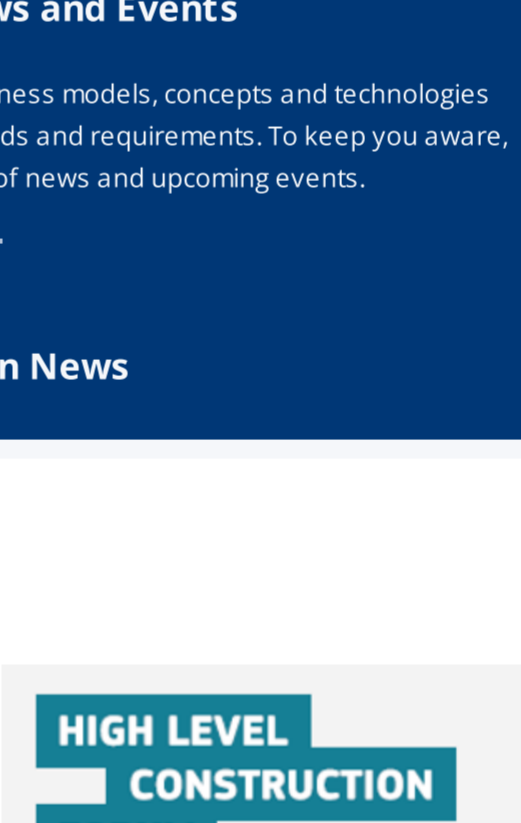
Construction News and Events

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

Launch of the High Level Construction Forum

On 28 September 2021 the European Commission launched the first High Level Construction Forum (HLCF) meeting to initiate the co-creation process of a transition pathway towards a green, digital and resilient construction ecosystem. About 220 representatives from industry, EU countries, European Commission, social partners and other stakeholders joined to exchange on the main priorities and themes of the HLCF. Overall, the invitation by the European Commission to join this co-creation process was embraced by stakeholders, highlighting the HLCF as a valuable platform to collaborate on a wide range of topics of relevance to the sector and for identifying the pathway for a green, digital and resilient transition.



[Read more](#)

Call for tenders: Technical study for the development and implementation of digital building logbooks

In the **Renovation Wave Communication, the Circular Economy Action Plan** and the **EU Strategy on adaptation to climate change**, the Commission committed to introducing Digital Building Logbooks, which will serve as repositories for data on individual buildings and facilitate information sharing within the construction sector, and between building owners and tenants, financial institutions, and public authorities. Digital building logbooks will also be a gateway and a provider of building related data from and to the **Building Renovation Passports, Smart Buildings Indicators Levels** and **Energy Performance Certificates (EPCs)** to ensure compatibility and integration of data throughout the lifecycle of buildings. DG GROW is calling on economic operators to submit their offers by 8 December 2021.

[View Tender Specifications](#)

It's time for Europe's building sector to go digital

The upcoming EU Building Renovation Wave package offers a once-in-a-lifetime opportunity to accelerate the digital transformation of a sector that employs 18 million people directly and accounts for the EU GDP, all while establishing a global model for building innovation, sustainability, and job creation. This article, written by DIGITAL4BRIQLE, explains why Europe's buildings and construction sectors must harness digital technology if they are to become more efficient and sustainable.



[Read the Full Article](#)

Will 2021 mark the beginning of a massive digitalisation decade in construction?

In the aftermath of lockdowns caused by the COVID19 pandemic, it has become clear to construction industry experts that digitalisation is crucial. There are many steps to take in the construction projects lifecycle that could be transferred—from manual, physical involvement, to the digital environment. The article focuses on design development, the project brief, contractor collaboration, documents and reporting as areas where digitalisation can be used to improve the efficiency of projects by minimising non-value adding activities. Moreover, digital tools will help with the sustainability and smart development goals of the sector. By improving construction project management, a lot of material waste can be avoided.



[Read the Full Article](#)

Upcoming Events

SME Assembly 2021



The SME assembly takes place during the **European SME week**. This on-site event will feature a combination of high-level panels and interviews, expert roundtables, interactive workshops, informative masterclasses, and innovative networking opportunities. This assembly will address the pressing questions that we face as a community, on how to move forward in light of the COVID-19 health crisis.

[Find out more](#)

Level(s): reshaping sustainability practices in the built environment



This online conference will introduce a new suite of tools to help construction professionals and stakeholders use the **Level(s) framework**. The framework ensures that individual buildings can make a measurable impact on crucial issues such as climate change, circular economy, climate adaptation and health. Speakers will explain how Level(s) is having an impact on EU and national legislation, provide examples of how the indicators have been used in building projects as well as how national certification schemes align with the framework. Register before Monday 22 November.

[Find out more](#)

The 2nd international conference on Circularity in the Built Environment (CIBEn)



The second international conference on Circularity in the Built Environment will start with a welcome reception in the old City Hall in Delft. The tickets to the conference also includes participation with all presentations, workshops and panel discussions, an off-site technical tour, lunches, coffees and a conference dinner to close the event. Keynote speakers will include Construction sector stakeholders, Peter Rem, Jorge de Brito, Vincenzo Genete and Mark Tomlinson.

[Find out more](#)

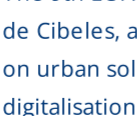
ECTP Conference



The 9th ECTP Conference is organised as a hybrid event, both with attendees onsite in Madrid, Palacio de Cibeles, and with an online broadcast for those unable to join in person. The conference will focus on urban solutions, people-centred building projects, a progressive construction ecosystem and digitalisation. Additionally, the new Horizon Europe programme, the partnership Built4People, the new Strategic Research Agenda of the ECTP and more will be presented.

[Registration](#)

[Find out more](#)



European Construction Sector Observatory
You are subscribed to ECSD newsletter
[Preferences](#) | [Unsubscribe](#)