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The European Construction Sector Observatory

The **European Construction Sector Observatory** aims to inform European policymakers and industry stakeholders about 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, 195 Policy Fact Sheets, 9 Analytical Reports and 4 Trend Papers are now online.

IN THIS NEWSLETTER YOU WILL FIND:

- 10 New Policy Fact Sheets
- 4 Updated Country Fact Sheets
- UPDATED Data Mapper

Environmental Performance in Construction

Environmental performance can be measured through a combination of factors to determine a building's environmental impact during its construction, use, and demolition, a.k.a. its lifecycle. Factors include the materials used in construction (whether they are sustainable, durable, and can be reused or recycled), energy efficiency (the more energy a building uses), water use (implementing grey water recycling and rain water collection devices), and more. This newsletter looks at various initiatives, policies and projects and how they improve Europe's environmental performance.

Policy Fact Sheets

Ten new Policy Fact Sheets (PPS) are now available for download, focusing on policies in Austria, Czechia, Denmark, Finland, France, Germany, Italy, Spain, and Sweden. The PPS provide an analysis of national policies illustrating the environmental impact of the construction sector.

Austria - Green Building Cluster of Lower Austria

The **Green Building Cluster of Lower Austria** (GBCLA) helps companies, especially SMEs, to strengthen their innovation capacities and competencies in relation to sustainable buildings in three thematic areas: climate-adaptive technologies, construction design efficiency (including energy efficiency), and digital construction. Over the last two decades, the GBCLA succeeded in developing partner and cluster strengths by building on the success of the Timber Cluster (2001-2003) and the previous Green Building Cluster (2003-2007). They delivered comprehensive and strategic support to help construction companies to transform and innovate, as well as support over 400 collaborative projects and over 2000 partners and stakeholders in the region. Finally, the GBCLA could also introduce a range of interventions at different phases of the innovation process aimed at removing bottlenecks to business innovation in the construction sector.

[Read the full Policy Fact Sheet](#)

The Czech Republic - Housing Support Programme

The National Housing Policy provides a framework for affordable housing in the Czech Republic. Most recently updated in 2016, the Housing Policy focuses on ensuring ample availability of all forms of housing, creating a stable and accessible housing market for all, reducing housing-related debt, and improving the environmental quality of residential areas. The programme co-financed 1 021 social housing and infrastructure development projects at a total cost of EUR 107.44 million. To date, there are 580 projects to develop wheelchair-accessible buildings, 263 projects to develop assisted apartments (care homes and senior community housing), and 178 technical infrastructure projects in the pipeline.

[Read the full Policy Fact Sheet](#)

Denmark - ProjectZero Sønderborg

ProjectZero Sønderborg is a joint venture between local citizens, businesses and government authorities that aims to make Sønderborg Municipality carbon neutral by 2029. As it becomes a carbon neutral city, Sønderborg can create new green jobs in knowledge-intensive industries and a workforce with the requisite mindset and skills to thrive and grow. The project achieved its 2020 target of reducing CO2 emissions by half. The city of Sønderborg is considered the poster child of sustainable energy solutions. The Haiyan County in China is using ProjectZero as a scalable model as part of the EU-China Urbanisation Partnership.

[Read the full Policy Fact Sheet](#)

Finland - ARA-Home 2049, Housing Design Competition

The **ARA-Home 2049 Housing Design Competition** was launched in 2019 to increase architecture students to envision what social housing might look like in 2049. It attracted 148 entries from a highly diverse group of candidates, including many entries from international participants. A total prize fund of EUR 12000 was awarded to seven winning entries. The first prize was for "The Future" an eco-conscious and multi-functional social housing design that fully integrates into the existing cityscape. Driven by the success of this competition, ARA has subsequently launched a number of further student and open design competitions, some of which have led to real-life construction and renovation projects.

[Read the full Policy Fact Sheet](#)

France - RECYBETON Complete Recycling of Deconstructed Concrete

RECYBETON brought together 47 public and private partners from the construction sector. They included contractors, construction companies, design offices, engineering companies producing raw materials, and construction components, public and private laboratories, universities and engineering schools, insurance federations and unions. The initiative demonstrated that it is possible to use more aggregates and recycled concrete than is allowed by French regulations (20% based on laboratory results and real test-sites, recycled aggregates are a feasible alternative in concrete production that meet the requirements in terms of structure, mechanical strength, durability over time, and high-quality fire resistance. Study results triggered 34 regulatory changes at the national level.

[Read the full Policy Fact Sheet](#)

France - Zero Rate Eco Loan Scheme

The Zero Rate Eco Loan scheme (éco-Prêt à Taux Zéro or éco-PTZ) provides interest-free loans that range from EUR 7 000 to EUR 80 000 for financing energy efficiency renovations in primary residences. The scheme is managed by the Ministry of the Economy, Finance and Recovery, in partnership with 15 banks. The main objectives of the scheme are to offer residents access to affordable eco-friendly housing financing, improve the energy efficiency and indoor climate of primary residences, and reduce the total energy consumption of the residential sector. A total of 111 077 loans have been awarded since 2008 at a total value of over EUR 7.4 billion. However, when looking at the results a whole, the loans were awarded to just over 1% of the 28 million primary residences in France.

[Read the full Policy Fact Sheet](#)

Germany - Circular Berlin

Circular Berlin is a non-profit organization that supports the development and acceleration of the circular construction economy in Berlin and to some extent, in the rest of Germany. The organisation has launched four main activities, namely connecting Berlin construction actors who play a role in circular solutions, through workshops, the Berlin Circular Construction Ecosystem Project, the Build for Tomorrow training programme, and the Documenting Circular Construction Reuse Processes Project. To gain key insights of circular construction in Berlin, the Circular Berlin teams' 4th action was to conduct 18 interviews with diverse stakeholders. By doing so, they were able to narrow down a list of challenges, construction enablers, best practices, and new high-impact actions.

[Read the full Policy Fact Sheet](#)

Italy - Green Bonus

The Green Bonus (Bonus Verde) tax relief scheme is managed by the National Agency for New Technologies, Energy and Sustainable Economic Development (ENEA). It enables taxpayers to claim a 36% tax deduction on the cost of greening private residential spaces. Eligible examples include green roofs, roof gardens, balconies, hanging gardens, rain, irrigation systems and wells. To access the scheme, taxpayers must claim the tax relief through their annual tax declaration. Although the results are a somewhat limited, estimates show government expenditure on the scheme to be about EUR 3.7 billion per year. One aim of the scheme is to increase economic activity for the horticultural and agricultural sectors, and is contributing to development of healthier and more sustainable cities.

[Read the full Policy Fact Sheet](#)

Spain - PAREER II Programme

The **PAREER II Programme**, a successor of PAREER-CECE 2013-2016, provided grants and loan funding to encourage and support renovation with the goal of increasing energy efficiency. A basic grant would cover 20-30% of total eligible costs. An additional grant was available depending on the type of building and intervention, as well as an optional loan that would cover up to 40-70% of total eligible costs. The measure attracted high demand, achieved a 75% application success rate, quickly exhausted its budget, and increased the energy performance rating of targeted buildings by 1-3 degrees. Between 2013 and 2018, the PAREER-CECE and PAREER II programmes supported energy efficient improvements to 80 000 homes in Spain.

[Read the full Policy Fact Sheet](#)

Sweden - Linero District Renovation Project

In 2014, the Cityfied EU-funded sustainable cities development project was launched to enhance energy efficiency and resource management in German districts. In Spain, regional governments and local authorities play an important role in improving energy efficiency for buildings, as they must submit information on their energy audits and efficiency programmes to national authorities. Consequently, regional initiatives support sustainable construction, in Andalusia, the Sustainable Construction Support Programme provides property owners with financial support for construction projects that improve energy efficiency and promotes the use of renewable energies. The programme supports sustainable investments in construction with a EUR 200 million fund corresponding to 68 000 construction projects, focusing on the most efficient and relevant energy sources, with the objective of saving 06 000 tonnes of CO2 per year, and reducing the global energy bill by EUR 500 million.

[Read the full Policy Fact Sheet](#)

Country Fact Sheets

Four updated Country Fact Sheets are now available for download, focusing on the construction markets in Germany, Romania, Spain, and the UK. The reports provide an analysis of key figures, macroeconomic indicators, economic drivers, trends and barriers, innovation and the national/regional policies and regulatory frameworks.

Country Fact Sheet Germany

Germany is one of the leading EU member states in the field of eco-innovation including waste management, recycling, and environmental technologies. Recently, the country has put an increased focus on a digital agenda. Germany has an environmental technology sector with strong exports, high numbers in patent development, high environmental and safety standards, skilled employees, efficient production chains and a strong industrial sector. Together, they provide a good basis for driving the country's circular economy and eco-innovation. Nonetheless, there is still some reluctance against environmental regulation and economic instrumentation. Overcoming in waste-to-energy facilities and inadequate incentives for waste prevention are issues that the government aims to address.

[Download the Country Fact Sheet](#)

Country Fact Sheet Romania

Romania's Green Building Council (RoGBC) is part of the country's construction landscape. The non-profit organisation promotes environmental responsibility and energy efficiency. The council groups together numerous organisations and companies in the construction sector to promote and support sustainable development in construction. Moreover, the RoGBC has introduced a certification and training programme to provide greater transparency as to the abilities of professionals working in construction and sectors related to a sustainably built environment. In climate action, Romania's performance is below the EU-28 average for greenhouse gas emissions, and energy and renewable-energy consumption. As part of its response, the country is set to invest EUR 1.8 billion in green and safe urban mobility transport.

[Download the Country Fact Sheet](#)

Country Fact Sheet Spain

The Green Building Council Spain developed the VERGE methodology to evaluate and certify sustainable buildings according to the Building Technical Code (BTE) in Spain, regional governments and local authorities play an important role in improving energy efficiency for buildings, as they must submit information on their energy audits and efficiency programmes to national authorities. Consequently, regional initiatives support sustainable construction, in Andalusia, the Sustainable Construction Support Programme provides property owners with financial support for construction projects that improve energy efficiency and promotes the use of renewable energies. The programme supports sustainable investments in construction with a EUR 200 million fund corresponding to 68 000 construction projects, focusing on the most efficient and relevant energy sources, with the objective of saving 06 000 tonnes of CO2 per year, and reducing the global energy bill by EUR 500 million.

[Download the Country Fact Sheet](#)

Country Fact Sheet United Kingdom

Under the Autumn Budget 2021, the UK government allocated EUR 7.2 billion for its **Construction Decarbonisation Plan**. The country also allocated EUR 4.7 billion for the decarbonisation of buildings across the UK, with a plan to further invest EUR 2.1 billion into supporting low-income households to make the net-zero transition. "A Green Future: Our 25 Year Environment Plan" announced in 2018, gives the first overarching policy overview for a coherent environmental vision that has been set up by the national government. An important part of the Plan is its promise to put the natural environment at the heart of housing and infrastructure development proposals. The Environment Plan alongside the Clean Growth Strategy and Industrial Strategy will put pressure on developers, house builders and multi-residence landlords to upgrade properties to deal with future climate requirements and in this way achieve the new sustainability vision.

[Download the Country Fact Sheet](#)

Construction News and Events

Construction is changing rapidly, with new business models, concepts and technologies being introduced to respond to new demands and requirements. To keep you aware, please find below a quick summary of news and upcoming events.

Construction News



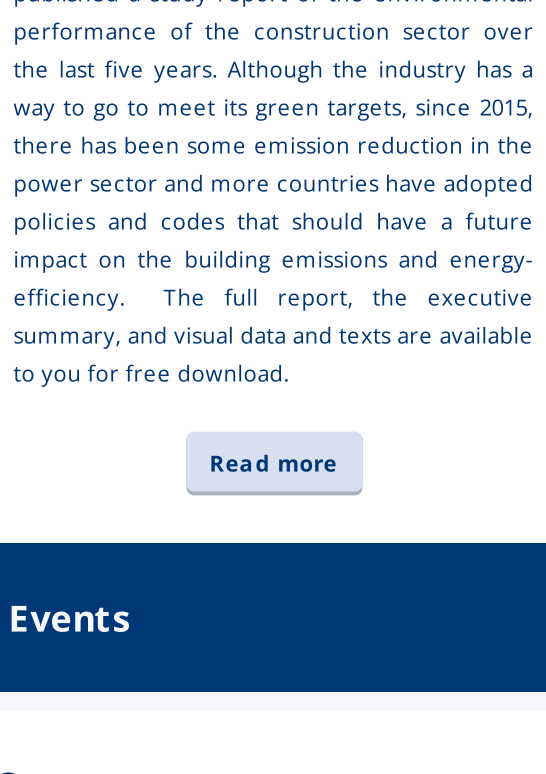
Newly updated Data mapper - ECSO website

We have "refreshed" our data mapper on the ECSO website. You can find the latest trends related to the construction sector across EU countries, whether these relate to topics such as internationalisation, skills and education, innovative trends or investments. The data mapper is based on a comprehensive set of EU comparable data across multiple years (where these are available) which are collected on a regular basis for the development of the Country Fact Sheets.

[Data mapper](#)

A new project for climate-positive circular communities, funded by EU's Green Deal

ANP (meaning heritage in Norwegian) is a four-year project by Housing Europe that has received EUR 20 million in funding from the EU's Green Deal to research climate positive circular communities in Europe. The project will provide guidelines and a political framework for future energy efficient and circular solutions in the construction industry. 35 partners from around Europe are involved, and the goal is to innovate scalable solutions for renovation in different climatic conditions and cultural contexts. Project sites are planned in Oslo in Norway, Sønderborg in Denmark, Karviná in the Czech Republic, Utrecht in the Netherlands, Palma in Spain, and Trento in Italy.



[Read more](#)

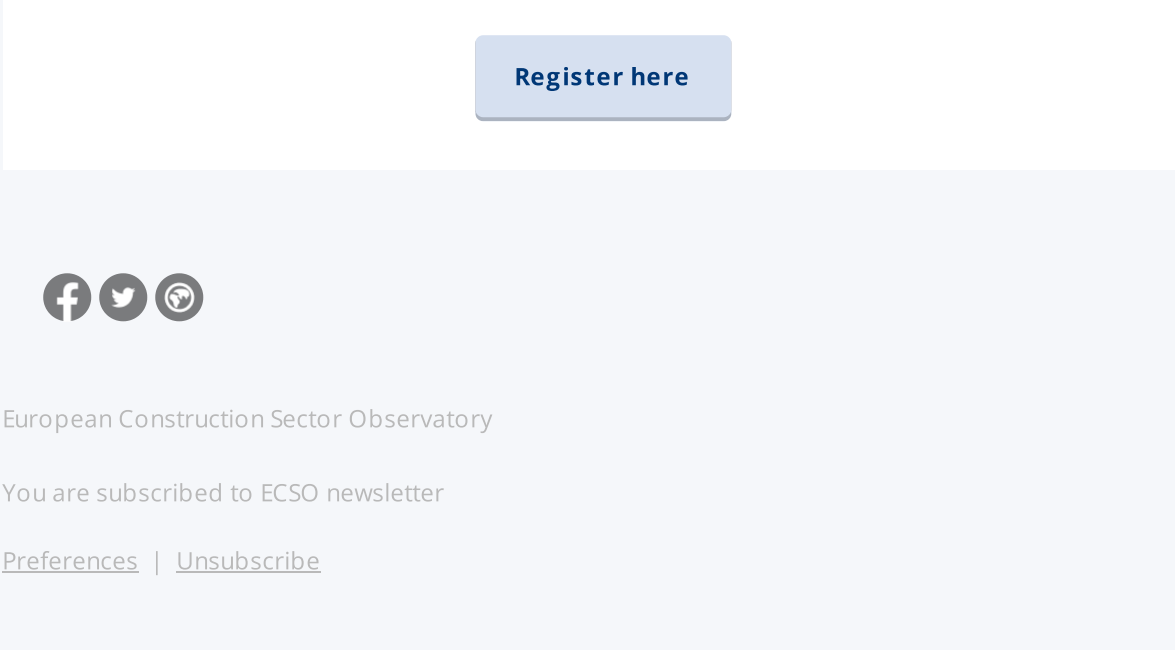
Global Status Report for Buildings and Construction

The UN Environment Programme (UNEP), hosted by the **Global Alliance for Buildings and Construction** (GlobalABC), has recently published a study report of the environmental performance of the construction sector over the last five years. Although the industry has a way to go to meet its green targets, since 2015, there has been some notable green action in the power sector and more countries have adopted policies and codes that should have a future impact on the building emissions and energy efficiency. The full report, the executive summary, and visual data and texts are available to you for free download.

[Read more](#)

Upcoming Events

Building Green



At Building Green Aarhus, the focus will be on sustainable choices. The event aims to prepare construction stakeholders to make decisions about transformation, sustainable materials, and the relationship between the urban environment and nature. This is an annual event with free attendance. Over two days, there will be more than 80 speakers and 70 exhibitors of sustainable solutions and products for the construction industry. There will be two stages presenting inspiring keynote speakers and interesting debates.

[Find out more](#)

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Central Europe towards Sustainable Building 2022



This international scientific conference will focus on topics like innovative technologies and systems, new materials and components for sustainable buildings, energy-efficient buildings and districts, adopting design, construction and operation of buildings to climate goals, integration of circular economy principles into building design processes, decision-support tools and assessment methods for a sustainable built environment, sustainable renovation of cultural and industrial heritage, sustainable urban development, and more.

[Find out more](#)

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