

Going sustainable in buildings

TOOL 01

STRATEGY

Introduction

This guidance tool supports users from different backgrounds (students, trainers, teachers, professionals, etc) in a reflection activity for define and explore the strategy approach for going sustainable in the building value chain. It helps individuals or teams identify their role, assess their maturity level, set short and long-term goals, explore future scenarios, plan practical actions, communicate the transition, and select relevant EXCEL4Housing 4.0 tools and resources.

There are no right or wrong answers. Use the questions to reflect on your current situation and identify possible next steps.



User Journey

- 1 Identify user
- 2 Check maturity
- 3 Set goals
- 4 Imagine the future
- 5 Explore business models
- 6 Communicate
- 7 Tools suggestions

WHO AM I?

User profile

Define yourself or your team

Reflect and define your role – Defining a simple user profile in the initial phase is an important step in driving meaningful self-reflection. Encouraging users to reflect on who they are and assess their current situation, helps to gain a clear understanding of users background, needs and context.

This self-awareness lays a foundation for the entire guidance journey. Understanding the current baseline makes it significantly easier to identify specific training needs and select the most relevant tools.

Note: This initial step aims to establish contact between the user and the guidance tool. Although it does not directly influence the selection of tools presented to the user, it prompts them to reflect on their purpose and goals. Defining a profile statement serves to characterize their profile and objectives, guiding their overall action

Select your profile

- ☐ Municipality / public authority
- ☐ Housing provider / developer
- ☐ Architect / designer / engineer
- ☐ Construction company
- ☐ Manufacturer / supplier
- ☐ Construction waste manager
- ☐ Facility or property manager
- ☐ Educator / trainer
- ☐ Student
- ☐ Researcher
- ☐ Other:

Main sustainability
needs

Profile statement

I am _____ working on _____ and
need guidance to _____.

Maturity Level

Define your level

Define your current sustainability maturity level to identify what you already have, what is missing, and what support is needed to progress

Level	Maturity stage	Description
Level 0	Unformed	Characterized by limited and/or ad-hoc actions, for example waste legal compliance.
Level 1	Basic	Initial framing and scoping, actively exploring opportunities.
Level 2	Improving	Process improvement. Characterized by ways of working that align with circular economy principles.
Level 3	Engaged	Product, service or process innovation. To align the value proposition to circular economy principles.
Level 4	Optimizing	Business model innovation. Organisational ways of doing business and creating value fully align to circular economy principles.



Select your level



Justify your selection

Questions for reflection

What do you need to jump one level?

Training, better data, tool access, budget, management support, stakeholder collaboration, clear KPIs, procurement criteria, regulatory knowledge, other.

What do you need to reach the final level?

Define a roadmap, assign responsibilities, create standard methods, test tools in real projects, monitor results and share lessons learned, other.

Defining goals

Move from broad ambition to clear short, medium and long-term goals, identifying what can start now, what can be applied next year, and what future transformation is desired. This can be education and knowledge goals, or business and professional goals.

Example

Time Horizon	Tomorrow	Next year	5/10 years
Goal	Learn one key concept or test one tool	Apply sustainability criteria in at least one project or training activity.	Make low-carbon, circular and resilient housing a standard practice.
Why it matters	Starts the transition with a small realistic action.	Turns learning into practice.	Creates long-term transformation.
What I need	A short training, example or tool link.	Data, tools, responsibilities and pilot case.	Roadmap, procurement rules, collaboration and monitoring.
Indicator of progress	One person/tool/concept identified.	Pilot completed and lessons documented.	Targets integrated in policies/projects.



Define 1 or more
goals for tomorrow

What do I need to achieve the goals?

Define 1 or more
goals for next year

What do I need to achieve the goals?

Define 1 or more
goals for 5/10 years

What do I need to achieve the goals?

Vision and strategy for the future

Define the desired future for sustainable buildings and identify the strategic priorities needed to move towards it, considering your personal situation, considering academic or professional goals.

Practical exercise. Create a scenario for your future

Based on the previous exercise, please write a future scenario statement

My desire future is:	In 2030/35, my housing projects will be _____ because _____
The strategic priorities are:	1 _____ 2 _____ 3 _____

New business models

A business model explains how an organisation creates, delivers and captures value. It describes what product or service is offered, who it is for, how it is delivered, which partners are involved, what resources are needed, and how the model can work successfully in practice over time.

In sustainable buildings, business models can help turn sustainability goals into practical services, products or ways of working, for example through lower energy use, longer product life, reuse, repair, circular material flows or improved building performance.

In this exercise, identify new business model ideas that support sustainable buildings, circularity, resource efficiency and long-term value creation.

Business models
examples

Circular
renovation
service
package

Material reuse
marketplace

Energy and
comfort
performance
service

Digital
building
passport
support

Product as a
service for
components

Performance
based
procurement

Indicate 3 ideas for a new and innovative business model

Explore and detail your ideas

Idea	Target user	Value created	Partners needed	Sustainability benefits	First pilot step

Communicate the transition

Clear communication is important for the sustainability transition because it can demonstrate practical solutions, increase awareness, change perceptions and engage stakeholders. It can also support co-creation and knowledge sharing. Communication should be adapted to different stakeholders and supported by real-life examples, data and facts.

Define how to communicate the sustainability transition clearly to different audiences using the right message, channel and evidence.

Example

Audience	What they care about	Main message	Best channel	Evidences to show
Residents	Comfort, bills, health	Sustainable housing can improve comfort and reduce operating costs.	Simple factsheet / short video	Energy results, comfort benefits
Municipality	Climate goals, regulation, public value	The project supports local climate and renovation strategies.	Workshop / policy brief	KPIs, case studies, roadmap
Investors	Risk, compliance, long-term value	Sustainability can reduce transition risk and improve green-finance alignment.	Executive summary	Taxonomy alignment, risk data
Real Estate professionals	Asset value, market demand, compliance, operating costs	Sustainability can improve asset value, reduce risk and attract future clients	Market brief / client presentation	Energy results, carbon data, certification potential, lifecycle cost benefits.
Design/ construction team	Practical methods and data	Tools can support better decisions from the early stage.	Training / design review	Tool outputs, examples

Practical exercise: Explore your communication plan

Audience	What they care about	Main message	Best channel	Evidences to show

Recommended tools

Excel4housing toolbox

Review your answers from the previous pages and identify your main planning and design needs. Then use the tables below to find the tools that best match those needs.

If the user needs...	Recommended tools	Why it fits
To develop a circular strategy or explore sustainable business models. To define how circular-economy principles can be integrated into your organisation, project or business model and explore possible strategic approaches.	KATCH_e CE Strategist	KATCH_e provides ideas and guidance for circular business-model design and strategy development.
	European Circular Economy Stakeholder Platform	The Platform provides good practices, case studies and resources to support research, planning and circular business strategies.
To learn from existing projects, case studies and good practice To see how other organisations or construction projects have applied circular, sustainable or low-carbon solutions and use these examples as inspiration.	European Circular Economy Stakeholder Platform	The platform provides practical examples, case studies, good practices and resources from circular-economy initiatives, helping users learn from existing experiences and approaches.
To understand sustainability compliance and green-finance requirements To understand whether a project or activity meets European sustainability criteria and how these criteria relate to sustainable investment and finance.	EU Taxonomy assessment for buildings	The EU Taxonomy assessment tool helps users evaluate building activities against European sustainability criteria and understand their alignment with requirements related to sustainable finance.
To plan for climate adaptation and resilience. To understand climate risks and vulnerabilities and identify suitable adaptation actions to improve resilience and support strategic planning.	Climate-ADAPT Urban Adaptation Support Tool (UAST)	The introduction tool builds understanding of embodied and operational carbon and possible reduction approaches, while KATCH_e CE Strategist helps translate this knowledge into circular strategies and practical actions.

Recommended tools

Excel4housing toolbox

If the user needs...	Recommended tools	Why it fits
To understand carbon reduction and identify areas for action To understand the main sources of embodied and operational carbon and determine where strategic action can support carbon reduction.	Introduction to decarbonized construction	The introduction tool builds understanding of embodied and operational carbon and possible reduction approaches
	KATCH_e CE Strategist	KATCH_e provides ideas and guidance for circular business-model design and strategy development.
	DGNB Toolbox "Carbon neutral building"	Provides guidance and practical instruments for understanding climate action, CO2 accounting and strategies for reducing emissions and moving buildings or districts towards carbon neutrality.
To identify key stakeholders and plan collaboration To identify the organisations and actors involved in your project, understand their roles and relationships, and plan how to engage them.	NetZeroCities Stakeholders Ecosystem Map (Canvas)	Helps users visually map relevant stakeholders, understand relationships between actors, and identify opportunities for engagement, collaboration and partnerships.
To identify and prioritise suitable tools for your next steps	EXCEL4Housing 4.0 toolbox filter	The Toolbox filter helps users narrow down available tools according to criteria such as project phase, need, difficulty, data requirements and sustainability goals, making it easier to identify the most suitable tools for their next steps.