

02/02/2026

# EXCEL4HOUSING4.0

Numero del progetto: 101194



D.2.2 – Report sull’analisi dello stato  
dell’arte

|                                                 |                                                                                                                                                                            |                           |            |
|-------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------|------------|
| Accordo di sovvenzionet No.                     | 101194014                                                                                                                                                                  |                           |            |
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| Sito Web del Progetto                           | <a href="https://excel4housing.eu/">https://excel4housing.eu/</a>                                                                                                          |                           |            |
| Work Package                                    | WP2: Mappatura del mercato del lavoro, valutazione delle competenze necessarie e analisi dello stato dell'arte in materia di efficienza energetica e edilizia sostenibile. |                           |            |
| Responsabile del WP                             | AKMI                                                                                                                                                                       |                           |            |
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## 1. Sommario Esecutivo

Il **D2.2 Analisi dello Stato dell'Arte** funge da ricerca fondamentale per il progetto EXCEL4Housing 4.0, mappando le tendenze attuali, le pressioni normative e le carenze sistemiche di competenze nel settore edilizio europeo. Il risultato centrale è che, mentre l'Unione Europea ha stabilito un solido quadro legislativo per la Transizione Verde (EPBD Recast, Tassonomia UE, CSRD), la capacità del settore di realizzare questa transizione—la cosiddetta Capacità di Implementazione—è fortemente limitata da un divario di competenze accelerato e multiforme.

**Nota metodologica sui dati ucraini:** mentre le metriche per gli Stati membri UE seguono principalmente Eurostat e i Piani Nazionali per l'Energia, i dati sull'Ucraina derivano da statistiche nazionali recenti (2024–2025) e report internazionali sulla ricostruzione. Questi valori riflettono il volume dei lavori completati e le esigenze di recupero urgente, che possono differire per natura ciclica dai tassi di ristrutturazione tipicamente osservati nell'UE-27.

### Principali Risultati per Sezione

**Tendenze di Mercato** (Rif. Capitolo 3): Il mercato sta passando dalla costruzione tradizionale e ciclica di nuove opere a un focus obbligatorio, guidato dalle politiche, sulla deep renovation. Sebbene l'attività di nuove costruzioni abbia rallentato nelle economie mature (es. Germania e Svezia) a causa di fattori macroeconomici, la domanda di ristrutturazione rimane robusta e non ciclica, supportata dai Recovery and Resilience Plans (RRPs) in paesi come Spagna e Portogallo.

Un caso unico all'interno del consorzio è **l'Ucraina**, dove il mercato è definito da un massiccio sforzo di 'Green Recovery' a seguito dei danni di guerra su larga scala. A differenza dei mercati UE maturi che affrontano una contrazione delle nuove costruzioni, l'Ucraina ha riportato un aumento significativo del **23,5% dell'attività** edilizia nel 2024. Questo aumento è guidato dalla ricostruzione urgente di infrastrutture residenziali e ingegneristiche, progressivamente allineate agli standard UE di efficienza energetica e clima per garantire sostenibilità a lungo termine.

**Quadro Normativo e Rischi** (Rif. Capitolo 4): La conformità è non negoziabile, con sanzioni che vanno dal rischio regolatorio fino a significativi rischi finanziari legati al "Brown Discount". La principale minaccia al raggiungimento degli obiettivi non è l'assenza di legislazione, ma la mancanza di personale qualificato. La Svezia sta già guidando questo cambiamento imponendo le Whole-Life Carbon (WLC) declarations, costringendo i progettisti a integrare immediatamente l'LCA nelle loro pratiche.

**Lacune di Competenze e Conoscenze** (Rif. Capitolo 5): Il deficit di competenze è sistemico, impattando sia ruoli tecnici sia manageriali:

- **Lacune Tecniche (Livello VET):** il gap più critico riguarda la mancanza di precisione nell'air-tightness e nell'installazione di sistemi energetici integrati. Questo fallimento tecnico causa direttamente il performance gap osservato in loco nei report di Grecia, Croazia e Ucraina, dove il rapido ritmo della ricostruzione residenziale intensifica ulteriormente la necessità di installatori specializzati in involucri termici ad alta efficienza.
- **Lacune Strategiche (Livello HE/Manageriale):** vi è una profonda mancanza di competenze nell'applicazione della Life Cycle Assessment (LCA) al design e un deficit critico di competenze

legate a ESG e EU Taxonomy data governance. Questa competenza digitale-finanziaria è essenziale per asset manager in paesi come Italia e Germania, che devono preparare dati verificabili per la reportistica CSRD, così come per project manager in Ucraina, che stanno allineando i progetti di ricostruzione agli standard internazionali di green financing.

**Digitalizzazione e Economia Circolare (Rif. Capitolo 6):** Sebbene il BIM sia uno strumento necessario (in espansione nella ristrutturazione in Spagna e Finlandia), il suo pieno potenziale per la modellazione della sostenibilità e l'uso dei dati (Digital Twins) rimane in gran parte inesplorato. L'Economia Circolare è ostacolata da barriere logistiche e tecniche, sottolineando la necessità di competenze in reverse logistics e certificazione dei materiali (area di focus in Belgio).

#### **Raccomandazioni Strategiche per WP4 (Rif. Capitolo 7)**

Per colmare il gap di competenze osservato, il curriculum EXCEL4Housing 4.0 (WP4) deve adottare un approccio focalizzato su competenze mirate e verificabili:

1. **Formazione per l'Integrazione Sistemica:** privilegiare moduli formativi focalizzati sulle interfacce tra diversi sistemi (es. HVAC e involucro edilizio), mirati direttamente al performance gap.
2. **Micro-Credenziali Certificate:** sviluppare unità formative flessibili e a breve termine per competenze ad alto rischio e alto impatto (es. Air-Tightness Sealing Techniques) per facilitare un rapido upskilling entro i vincoli di tempo e costo delle PMI.
3. **Conformità Digitale:** rendere obbligatoria la formazione sull'uso di BIM/Digital Twins per estrazione dati e calcolo WLC, creando nuovi profili di Data-Driven Compliance Managers.
4. **Formazione dei Formatori:** implementare immediatamente un programma dedicato per potenziare gli istruttori VET, che rappresentano il collo di bottiglia più critico per scalare il nuovo curriculum. In questo contesto, l'iniziativa ucraina '#100 Workshops' funge da benchmark strategico per modernizzare rapidamente le infrastrutture formative e la capacità degli istruttori in ambienti ad alta pressione.
5. **Modelli VET Resilienti alle Crisi:** sfruttare l'iniziativa ucraina '#100 Workshops' come benchmark per modernizzare rapidamente le infrastrutture formative e soddisfare le urgenti esigenze di ristrutturazione energetica efficiente in ambienti ad alta pressione.

L'implementazione efficace di queste raccomandazioni è vitale per garantire che la forza lavoro europea possieda le competenze necessarie per raggiungere l'obiettivo Zero-Emission Building entro il 2050.

## 2. Introduzione e Metodologia

Questo capitolo presenta il contesto fondamentale del progetto EXCEL4HOUSING4.0 e stabilisce la metodologia utilizzata per compilare questo report di State-of-the-Art Analysis (D2.2).

Vengono dettagliati gli obiettivi specifici del progetto e del Task 2.2, che si concentra sulla mappatura delle tendenze di mercato e sull'identificazione delle best practices. Inoltre, viene descritto l'approccio di ricerca sistematica adottato, che combina una desk research strutturata a livello europeo con la sintesi dei dati nazionali forniti dai partner del consorzio. Ciò garantisce una solida base di evidenze, geograficamente diversificata, a supporto dello sviluppo del curriculum del progetto.

### 2.1. Contesto del Progetto

Questo report, D2.2 State-of-the-Art in energy efficiency and sustainable housing sector, è il deliverable fondamentale del Work Package 2 (WP2) del progetto EXCEL4HOUSING 4.0. Come Erasmus+ Partnership for Excellence (Project No. 101194014), il progetto affronta direttamente il skills gap nel settore edilizio europeo necessario per raggiungere gli obiettivi di Zero-Emission Building (ZEB) fissati dall'EPBD Recast e dalla più ampia strategia della Renovation Wave.

EXCEL4HOUSING4.0 è un Transnational Erasmus+ Centre of Vocational Excellence focalizzato sull'empowerment dei settori costruzioni e abitativo per affrontare le transizioni verde e digitale. Il progetto crea una rete solida di VET providers, academia, industry e public authorities per co-sviluppare soluzioni alle nuove esigenze di competenze in efficienza energetica, tecnologie edilizie verdi e abitazioni sostenibili.

Obiettivi Specifici:

- Sviluppare programmi formativi e di capacity building transfrontalieri  
→ Co-creare schemi formativi innovativi focalizzati su competenze green, digitali e circolari per abitazioni sostenibili ed efficienza energetica.
- Stabilire partnership strategiche VET-Accademia-Industria  
→ Promuovere collaborazione tra istituzioni educative, PMI e leader industriali per garantire rilevanza e applicabilità dei programmi formativi.
- Promuovere competenze avanzate in costruzioni smart e green  
→ Fornire conoscenze e strumenti necessari per la decarbonizzazione e digitalizzazione del settore abitativo.
- Promuovere percorsi inclusivi e flessibili di upskilling/reskilling  
→ Personalizzare opportunità di apprendimento per giovani, adulti e gruppi sottorappresentati in linea con gli obiettivi di lifelong learning.
- Creare un modello sostenibile di finanziamento e governance  
→ Garantire sostenibilità a lungo termine e allineamento politico dell'eccellenza VET in finanza per l'efficienza energetica e costruzioni green.

- Contribuire agli obiettivi del Green Deal UE e dell'Economia Circolare  
→ Allineare i risultati formativi agli obiettivi UE di sostenibilità ambientale e sociale tramite una trasformazione vocazionale sistemica.

WP2: Mappatura del Mercato del Lavoro, Analisi dei Bisogni di Competenze e Stato dell'Arte

Il WP2 è progettato per stabilire una baseline solida e basata su evidenze.

Questa baseline è cruciale per garantire che i curricula Vocational Education and Training (VET) sviluppati in WP4 siano veramente demand-driven, rilevanti per l'agenda Housing 4.0 (economia digitale e circolare) e capaci di mitigare i rischi di compliance dettagliati nel Capitolo 4.

Questo viene realizzato tramite mappatura delle tendenze del mercato del lavoro (T2.1), analisi dello stato dell'arte e raccolta delle best practices (T2.2), e definizione dei bisogni formativi e dei profili professionali (T2.3).

## 2.2. Obiettivi della Task 2.2

La Task 2.2, intitolata "Stato dell'arte dell'efficienza energetica, del settore abitativo sostenibile e identificazione delle migliori pratiche VET (insegnamento, metodologie e strumenti)", è guidata da CEEC.

L'obiettivo principale della T2.2 è **fornire una base robusta e basata su evidenze a supporto** dello sviluppo di programmi formativi innovativi, forward-looking e demand-driven in WP4.

I due output principali sono:

- **Rapporto State-of-the-Art (D2.2):** consolidare tendenze nazionali, impatti normativi e qualifiche VET esistenti in una panoramica europea sintetizzata, identificando i gap di competenze e conoscenze più acuti e sistemici che impediscono una compliance efficace.
- **Compendio delle Best Practices (D2.3):** identificare e mostrare metodologie, strumenti e curricula VET innovativi che affrontano con successo i gap di competenze, fornendo modelli per l'implementazione in WP4.

## 2.3. Panoramica Metodologica

Il report D2.2 è il risultato di un approccio metodologico strutturato in due fasi, implementato attraverso il consorzio, garantendo coerenza e tracciabilità transnazionale.

### Fase 1: Desk Research e Raccolta Dati Iniziale

Questa fase ha visto la raccolta di dati primari dai partner nazionali, guidati da un rigoroso framework metodologico e da una checklist di elegibilità:

- Contributi Nazionali: sintesi di dati provenienti da 11 report nazionali State-of-the-Art di Belgio, Croazia, Finlandia, Germania, Grecia, Italia, Polonia, Portogallo, Spagna, Svezia e Ucraina.
- Focus dei Dati: ogni report nazionale doveva contenere analisi dicinque assi principali: tendenze di mercato, implementazione normativa (EPBD, CSRD), stato del VET, digitalizzazione e economia

circolare.

- Credibilità delle Fonti: ogni report è basato su almeno dieci fonti recenti (2018+), rilevanti e affidabili, tra cui statistiche nazionali, documenti di policy e pubblicazioni UE autorevoli.

## **Fase 2: Validazione Interna e Sintesi**

I report nazionali hanno fornito input per la sintesi centrale guidata da CEEC, assicurando qualità e coerenza:

- Revisione Interna: tutti i report sono stati sottoposti a peer-review all'interno del consorzio per validare i risultati e garantire l'allineamento con lo scopo complessivo del progetto.
- Copertura Geografica: copre mercati diversi, da economie mature con pipeline di ristrutturazione consolidate (Germania, Svezia), ai contesti del Sud Europa (Grecia, Portogallo) fino agli ambienti di ricostruzione in Europa Orientale (Ucraina).
- Consolidamento: analisi comparativa tra gli 11 paesi per identificare deficit di competenze sistemici e specifici (vedi Capitolo 5). Riferimenti diretti a contesti nazionali specifici (es. WLC svedese o incentivi greci) sono mantenuti per alta tracciabilità tra risultato europeo e fonte nazionale.

La struttura del report si basa sull'outline indicativo e sintetizza dati di 24 partner in 11 paesi.

Per garantire comparabilità, i dati nazionali sono allineati agli standard UE (EPBD, EED).

Nel caso dell'Ucraina, pur essendo in fase di armonizzazione normativa completa, l'analisi include dati dai piani nazionali di recupero e report infrastrutturali recenti (2024), offrendo una prospettiva forward-looking per l'integrazione nel framework europeo per l'abitare sostenibile.

### 3. Analisi delle Tendenze di Mercato e dei Fattori Trainanti

[Segnaposto: Questa sezione sintetizzerà i contributi nazionali riguardanti le tendenze di mercato. (Lunghezza approssimativa del testo: 8-10 pagine)]

#### 3.1. Attività Costruttiva Attuale: Sintesi dei tassi di ristrutturazione e delle tendenze nella nuova costruzione nei paesi partecipanti.

Il settore edilizio europeo, pur essendo fondamentale per la Transizione Verde, presenta un quadro altamente eterogeneo allo stato attuale, fortemente influenzato dalle politiche economiche nazionali e da fattori macroeconomici.

Nei paesi del consorzio, l'attività resta fortemente biforcata: il segmento della ristrutturazione è generalmente stabile o in crescita (trainato da incentivi statali), mentre il segmento delle nuove costruzioni sta affrontando notevoli difficoltà.

Il settore edilizio nei paesi partner mostra un panorama variegato. Mentre mercati maturi come Germania e Svezia hanno registrato un rallentamento dei permessi residenziali a causa di pressioni economiche, altri paesi come Grecia, Portogallo e Ucraina mantengono una traiettoria più attiva. In quest'ultimo, l'attenzione si sposta sempre più verso la ricostruzione e il restauro degli alloggi, spesso guidata da piani nazionali di recupero che danno priorità alle esigenze abitative immediate insieme alla sostenibilità a lungo termine.

**Tendenze nelle Nuove Costruzioni:** Diversi mercati europei chiave, tra cui Germania, Svezia e Finlandia, prevedono un calo o rallentamento della nuova costruzione residenziale per il 2024 e il 2025.

Questa flessione è principalmente attribuita a alta inflazione, costi energetici e dei materiali in aumento e tassi di interesse elevati, che hanno gravemente impattato i modelli di finanziamento degli sviluppatori e la domanda dei consumatori.

Al contrario, paesi come Polonia e Italia hanno recentemente mostrato resilienza o crescita, spesso supportati da forti misure di stimolo pubblico che temporaneamente hanno compensato il raffreddamento del mercato.

**L'Imperativo della Ristrutturazione:** Il nucleo dell'attività attuale in tutti i paesi partecipanti – dalla Croazia (trainata dalla ricostruzione post-sisma e dagli obiettivi di efficienza energetica) al Portogallo e alla Spagna (che sfruttano i piani nazionali di recupero) – è la necessità di ristrutturazione degli edifici.

- La **Renovation Wave** e la direttiva Energy Performance of Buildings (EPBD) Recast fungono da pilastri critici del mercato. I programmi nazionali (es. Exoikonomo in Grecia, Renolution nelle regioni del Belgio) si concentrano su miglioramenti energetici profondi o a fasi, spostando il patrimonio esistente verso standard Near-Zero Energy Building (NZEB) o Zero-Emission Building (ZEB).
- In **Croazia**, l'attenzione è duplice: raggiungere gli standard energetici obbligatori e integrare la resilienza sismica nelle pratiche di ristrutturazione.
- In **Italia**, mentre il volume è stato notevolmente aumentato dal Superbonus, il mercato sta ora passando verso risparmi energetici verificabili a lungo termine, allineati alla EU Taxonomy.

**Conclusione sull'Attività:** Sebbene il clima economico attuale presenti sfide immediate, in particolare un rallentamento delle nuove costruzioni a causa di fattori macroeconomici come tassi di interesse e inflazione in aumento, le prospettive a lungo termine per i servizi specializzati di ristrutturazione profonda

rimangono eccezionalmente solide e non cicliche.

Questa domanda robusta è principalmente guidata da due forze critiche interconnesse che trascendono i cicli economici tipici:

1. **Imperativi di Politica Pubblica:** le politiche pubbliche nazionali e regionali si concentrano sempre più su efficienza energetica, decarbonizzazione e resilienza del patrimonio edilizio come componenti chiave della crescita sostenibile. Incentivi finanziari e fondi pubblici mirati creano un flusso costante di progetti.
2. **Pressione Normativa da Bruxelles:** il quadro legislativo dell'UE, in particolare le direttive relative alla Performance Energetica degli Edifici (EPBD) e gli obiettivi di neutralità climatica (Fit for 55), impone requisiti obbligatori e crescenti per l'aggiornamento energetico e la modernizzazione degli edifici esistenti. Questo contesto normativo agisce come un catalizzatore potente e inevitabile per gli investimenti nella ristrutturazione profonda.

Di conseguenza, l'intero consorzio, specializzato in soluzioni complete di ristrutturazione profonda, è posizionato per beneficiare di una domanda strutturale, sostenuta e regolamentata, ampiamente protetta dalle fluttuazioni temporanee che colpiscono il settore delle nuove costruzioni. Questo posizionamento strategico garantisce previsioni aziendali stabili e valida il focus sugli upgrade edilizi specializzati e ad alta efficienza energetica.

### 3.2. Fattori Chiave di Mercato: Analisi delle forze comuni che guidano (o ostacolano) la transizione verde (es. finanziamenti pubblici, pressione economica, domanda di NZEB/ZEB).

Lo spostamento verso 'Housing 4.0' è guidato da una forte congiunzione di mandate normative e dinamiche di mercato in evoluzione.

**Spinta Normativa (Top-Down):** in tutti i report nazionali, i driver più significativi sono le iniziative legislative UE. Queste impongono cambiamenti fissando minimi di performance e definendo investimenti sostenibili:

- **EPBD Recast e Standard ZEB:** driver diretto per la forza lavoro tecnica. La transizione verso lo standard ZEB per nuove costruzioni e il requisito di Minimum Energy Performance Standards (MEPS) per il patrimonio esistente stanno forzando cambiamenti rapidi nelle pratiche di progettazione e costruzione (citato da Germania, Belgio e Svezia).
- **EU Taxonomy per la Finanza Sostenibile:** questa regolazione guida le decisioni di investimento, rendendo gli asset 'green' finanziariamente preferenziali. Questo driver è particolarmente rilevante per grandi sviluppatori e investitori istituzionali in mercati maturi (es. Svezia, Italia).
- **Corporate Sustainability Reporting Directive (CSRD) & ETS2:** driver emergenti che aumenteranno significativamente la domanda di dati e performance verificabili. Grandi imprese edili e fornitori abitativi dovranno presto riportare l'impatto ambientale, richiedendo strumenti digitali e competenze specializzate.

**Trazione Finanziaria ed Economica (Bottom-Up):** mentre le normative fissano gli obiettivi, i meccanismi finanziari forniscono lo stimolo immediato per il volume:

- **Finanziamenti Nazionali e Piani di Ripresa:** i programmi finanziati dai Recovery and Resilience Plans (RRPs) sono il principale driver a breve termine del volume di ristrutturazione (Portogallo,

Spagna, Grecia). Questi sussidi creano un flusso stabile per i fornitori di **formazione VET**.

- **Domanda di Decarbonizzazione:** nei mercati avanzati, in particolare **Svezia e Germania**, la crescente domanda di edifici certificati a basse emissioni o zero-emission da clienti privati, enti pubblici e investitori spinge verso l'innovazione dei materiali e delle tecnologie.
- **Adozione della Digitalizzazione:** la necessità di miglior coordinamento dei progetti, controllo qualità e dati sul ciclo di vita guida l'adozione di BIM e Digital Twins (Finlandia, Croazia, Spagna). Questo spostamento digitale sta diventando un driver implicito di competenze.

La transizione verso "Housing 4.0" è guidata da una forte dinamica duale: una combinazione di regolamentazione top-down obbligatoria e pressione economica e finanziaria bottom-up — come i framework di green recovery in Ucraina — protegge il settore della ristrutturazione profonda dall'instabilità economica a breve termine che colpisce le nuove costruzioni.

Al centro della spinta top-down ci sono le iniziative legislative UE: EPBD Recast, che fissa obiettivi non negoziabili per Zero-Emission Buildings (ZEB) e Minimum Energy Performance Standards (MEPS); EU Taxonomy per la Finanza Sostenibile che indirizza il capitale verso asset green verificati, rendendo la sostenibilità un requisito finanziario anziché un'opzione tecnica.

Questo contesto normativo trasforma rapidamente la non conformità in un rischio finanziario significativo ("Brown Discount").

Parallelamente, la spinta bottom-up è guidata da stimoli finanziari ed economici essenziali, principalmente Finanziamenti Nazionali e Piani di Ripresa (RRPs), che forniscono un flusso costante di progetti di ristrutturazione profonda sovvenzionati nei paesi del consorzio (es. Spagna, Portogallo, Grecia e Ucraina). Inoltre, nei mercati avanzati come Svezia e Germania, la crescente domanda di edifici certificati a basse emissioni e zero-emission da parte di investitori pubblici e privati accelera l'innovazione dei materiali e della progettazione.

Infine, la necessità di un miglior controllo qualità e verifica dei dati, guidata dai requisiti imminenti di reporting della CSRD, rende l'adozione di strumenti digitali — in particolare BIM per energia e Life Cycle Assessment (LCA) — un driver implicito e inevitabile di competenze lungo tutta la catena del valore.

## 4. Scenario Normativo e Rischi di Conformità

### 4.1. Quadro Legislativo UE: Panoramica delle direttive principali che impattano il settore (EPBD, Renovation Wave, ETS2, Ecodesign).

Il panorama dell'attività edilizia nazionale è fondamentalmente modellato e regolato da un trio di regolamenti interconnessi e influenti dell'Unione Europea.

Questi atti legislativi — la **Direttiva sulla Prestazione Energetica degli Edifici (EPBD)** Recast, la **EU Taxonomy per la Finanza Sostenibile**, e la **Corporate Sustainability Reporting Directive (CSRD)** — stabiliscono gli standard minimi non negoziabili e i requisiti di rendicontazione obbligatori.

#### Direttiva sulla Prestazione Energetica degli Edifici (EPBD) Recast

L'EPBD Recast è la normativa cardine focalizzata esplicitamente sull'efficienza energetica del patrimonio edilizio UE. Il suo obiettivo principale è ottenere un patrimonio edilizio altamente efficiente e decarbonizzato entro il 2050, facilitando la trasformazione economica degli edifici esistenti in Nearly Zero-Energy Buildings (NZEB) e, in seguito, in Zero Emission Buildings (ZEB).

- **Principali disposizioni:** Impone strategie nazionali di ristrutturazione a lungo termine, definisce standard minimi di prestazione energetica (MEPS) per edifici non residenziali e, progressivamente, residenziali, e promuove l'adozione di sistemi di automazione e controllo degli edifici.
- **Impatto sull'edilizia:** La direttiva influenza direttamente le specifiche di progettazione, la scelta dei materiali (es. isolamento, vetri), i requisiti dei sistemi di riscaldamento e raffrescamento e l'adozione di tecnologie rinnovabili in loco. La conformità è essenziale per ottenere permessi di costruzione e garantire la commerciabilità.

#### EU Taxonomy per la Finanza Sostenibile

La Taxonomy UE è un sistema di classificazione che stabilisce un elenco di attività economiche ambientalmente sostenibili. Fornisce a aziende, investitori e policymakers una definizione solida e basata sulla scienza di ciò che è considerato "green", con l'obiettivo di aumentare gli investimenti sostenibili e prevenire il greenwashing.

- **Rilevanza per l'edilizia:** Le attività nel settore edilizio, come la costruzione di nuovi edifici, ristrutturazione e installazione di impianti rinnovabili, devono contribuire sostanzialmente a uno dei sei obiettivi ambientali (es. mitigazione/adattamento ai cambiamenti climatici) senza arrecare danni significativi agli altri (principio DNSH – Do No Significant Harm).
- **Impatto sul finanziamento:** Affinchè i progetti edilizi siano etichettati come "sostenibili" e attraggano finanziamenti green, devono rispettare i criteri tecnici dettagliati della Taxonomy, influenzando tutto, dalla selezione del sito e approvvigionamento dei materiali alla prestazione

energetica.

### Corporate Sustainability Reporting Directive (CSRD)

La CSRD rafforza significativamente le regole riguardanti le informazioni sociali e ambientali che le grandi imprese devono rendicontare. Sostituisce la Non-Financial Reporting Directive (NFRD) e mira a garantire che le aziende divulghino pubblicamente informazioni adeguate sui rischi e le opportunità di sostenibilità, nonché sugli impatti su persone e ambiente.

- **Rilevanza per le imprese edilizie:** Imprese di costruzione, sviluppatori e istituzioni finanziarie rientranti nell'ambito della CSRD devono riportare dettagliatamente le proprie prestazioni di sostenibilità utilizzando gli European Sustainability Reporting Standards (ESRS).
- **Impatto su operazioni e supply chain:** Questo obbligo di rendicontazione impone all'industria edilizia di monitorare e divulgare metriche relative a consumo energetico, emissioni di GHG (Scope 1, 2 e 3, includendo in modo critico il carbonio incorporato nei materiali), produzione di rifiuti e due diligence della supply chain. La direttiva integra i requisiti di EPBD e EU Taxonomy nella rendicontazione aziendale obbligatoria, collegando l'attività edilizia direttamente alla responsabilità finanziaria e alla trasparenza di mercato.

**Queste tre normative operano quindi in sinergia:** l'EPBD definisce gli obiettivi tecnici di prestazione, la EU Taxonomy stabilisce cos'è un investimento sostenibile e la CSRD impone la rendicontazione WLC e la trasparenza, integrando le prestazioni di sostenibilità nella strategia aziendale e nei mercati finanziari.

### Direttive Ecodesign e Etichettatura Energetica

Queste direttive sono fondamentali per garantire che i componenti tecnici installati negli edifici siano allineati agli obiettivi di efficienza energetica definiti dall'EPBD.

La Direttiva Ecodesign stabilisce standard minimi obbligatori di prestazione per i prodotti legati all'energia (es. caldaie, pompe di calore, sistemi di ventilazione, scaldabagni) immessi sul mercato UE, eliminando efficacemente i prodotti meno efficienti.

Contemporaneamente, la Direttiva sull'Etichettatura Energetica fornisce informazioni chiare e comparabili a consumatori e professionisti sul consumo energetico di tali prodotti. Il loro effetto combinato spinge i produttori verso l'innovazione, garantendo che i sistemi utilizzati in ristrutturazioni e nuove costruzioni siano conformi agli standard di efficienza.

## 4.2. Trasposizione Nazionale e Impatto: Analisi consolidata su come i Paesi stanno implementando la legislazione e i rischi specifici di non conformità a livello nazionale.

La trasposizione della legislazione UE in diritto nazionale mostra livelli diversi di ambizione e complessità tra i partner del consorzio. L'attenzione principale per tutti è **l'implementazione dell'EPBD Recast**, in particolare il **passaggio verso gli Zero-Emission Buildings (ZEB)** e l'applicazione dei Minimum Energy Performance Standards (MEPS).

Questa implementazione comporta sfide legislative e tecniche significative, inclusi aggiornamenti dei

codici edilizi nazionali, sviluppo di nuove metodologie di calcolo delle prestazioni energetiche e creazione di robusti meccanismi di controllo. Inoltre, la trasposizione deve considerare l'integrazione delle fonti rinnovabili, i requisiti dei passaporti di ristrutturazione e la graduale eliminazione dei combustibili fossili nei sistemi di riscaldamento e raffrescamento, per allinearsi agli obiettivi di neutralità climatica dell'UE.

Le variazioni tra i partner del consorzio riguardano la velocità di adozione, le soglie specifiche fissate per ZEB e MEPS e i meccanismi di supporto impiegati per facilitare la transizione del settore edilizio.

| Paese      | Strumento Normativo Chiave                             | Focus Principale e Stato della Conformità                                                                                                                                                                                                                                                      |
|------------|--------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Germania   | Legge sull'Energia degli Edifici (GEG)                 | Il GEG consolida l'efficienza energetica. Forte attenzione all'eliminazione graduale dei sistemi di riscaldamento a olio/gas e all'integrazione delle energie rinnovabili. La sfida principale consiste nel coordinare artigiani qualificati per rispettare gli standard di qualità richiesti. |
| Svezia     | Legge Nazionale sulla Dichiarazione Clim               | Standard già elevati. Focus sulle Dichiarazioni di Carbonio sull'Intero Ciclo di Vita (WLC) obbligatorie dal 2022 per nuovi edifici. La spinta normativa è ora centrata sulla circolarità e sull'analisi del ciclo di vita (LCA).                                                              |
| Belgio     | Quadri Altamente Regionalizzati                        | La conformità è gestita in modo differente tra Fiandre, Vallonia e Bruxelles. Bruxelles mira a dotare tutte le abitazioni di un EPC entro il 2030, aumentando la pressione sulle ristrutturazioni su larga scala e progressive.                                                                |
| Spagna     | Codice Edilizio Nazionale (CTE) & Piano d              | Sfrutta il Piano di Ripresa e Resilienza (RRP) per programmi di ristrutturazione su larga scala. Il focus normativo è garantire un'esecuzione di alta qualità dei lavori sovvenzionati e allineare le competenze tecniche.                                                                     |
| Croazia    | Strategia Nazionale di Ristrutturazione                | Forte enfasi sulla ricostruzione post-sismica e sull'utilizzo dei fondi UE per la ristrutturazione energetica profonda. La conformità è strettamente monitorata tramite progetti finanziati pubblicamente.                                                                                     |
| Grecia     | National Action Plan (Electra, Exoikonomo)             | La conformità è guidata da incentivi finanziari pubblici che impongono gli standard NZEB. Una sfida chiave è garantire una gestione della qualità costante in cantiere.                                                                                                                        |
| Polonia    | National ZEB Standards                                 | Focus principale sull'applicazione degli standard ZEB per tutte le nuove costruzioni e sulla definizione di obiettivi nazionali per la ristrutturazione profonda del patrimonio esistente.                                                                                                     |
| Finlandia  | EU Directive on Energy Efficiency (EU/2023/1791)       | Base per l'aggiornamento delle normative nazionali e dei requisiti per il calcolo dell'efficienza energetica negli edifici nuovi e nelle ristrutturazioni.                                                                                                                                     |
| Portogallo | National Energy and Climate Plan 2021–2030 (PNEC 2030) | Allineato con il Green Deal Europeo e il Piano d'Azione per l'Economia Circolare (CEAP). Il mercato consolida la propria posizione, con oltre il 30% dei nuovi progetti residenziali del 2024 progettati con sostenibilità ed efficienza energetica come driver principali (Confidencial       |

|         |                                                  |                                                                                                                                                                                                                                                                                      |
|---------|--------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|         |                                                  | Imobiliário, 2025).                                                                                                                                                                                                                                                                  |
| Italia  | Criteri Ambientali Minimi, CAM                   | Il settore è guidato da un quadro completo a livello europeo e nazionale, con obiettivi ambiziosi per sostenibilità, efficienza energetica e digitalizzazione. Questi rappresentano requisiti obbligatori nazionali di sostenibilità e circolarità nei progetti di appalti pubblici. |
| Ucrania | Law on Energy Efficiency; National Recovery Plan | Allineamento con il Green Deal UE e gli standard di prestazione energetica per la ricostruzione.                                                                                                                                                                                     |

**Tabella 1. Elenco dei Paesi e dei Principali Strumenti Normativi**

**Il Rischio Principale di Conformità** Dall'analisi dei report nazionali emerge un elemento comune: il rischio principale per la conformità normativa non risiede nella capacità legislativa, ma nella capacità di esecuzione. La velocità e il volume richiesti dalla Renovation Wave, combinati con la complessità tecnica degli standard ZEB, evidenziano una carenza critica nel **volume e nella competenza della forza lavoro specializzata** (ad es., installatori, responsabili di cantiere, progettisti specializzati). Ciò influisce direttamente sulla capacità di rispettare le scadenze e i parametri di performance verificabili.

Come esempio specifico, la **struttura federale del Belgio** porta a percorsi di attuazione divergenti ma complementari nelle tre regioni:

- **Vallonia:** ha progressivamente inasprito la trasposizione dell'EPBD e ha allineato tutte le nuove costruzioni agli standard NZEB (Nearly-Zero-Energy Building) dal 2021.
- **Fiandre:** applica un "obbligo di ristrutturazione" che richiede agli acquirenti di edifici residenziali a bassa efficienza (EPC E/F) di ristrutturare fino a una classe D entro cinque anni.
- **Regione di Bruxelles-Capitale:** guida la strategia RENOLUTION (2021–2030), che fornisce premi finanziari e assistenza tecnica per raggiungere obiettivi energetici e circolari.

#### Implicazioni Chiave e Sfide

- **Frammentazione:** il modello decentralizzato, pur consentendo personalizzazioni regionali, crea sfide per il coordinamento nazionale e lo sviluppo di standard formativi coerenti per la forza lavoro del settore costruzioni.
- **Tasso di Ristrutturazione:** gli obiettivi allineati all'EPBD richiedono di quadruplicare il tasso di ristrutturazione in Belgio per raggiungere gli standard energetici del 2050, rendendo la ristrutturazione il "luogo di crescita" decisivo del settore.
- **Collo di Bottiglia delle Competenze:** il rapporto sottolinea che la scarsità di competenze (particolarmente nelle competenze digitali BIM/LCA e circolari) è il "fattore vincolante" che deve essere affrontato per garantire che la domanda indotta dalle politiche non superi la capacità di consegna.

#### 4.3. Reporting Finanziario (Taxonomy & CSRD): Sintesi dello stato attuale dei requisiti di rendicontazione e del loro impatto sulla finanza e sul valore degli asset (il "Brown Discount").

L'introduzione della Taxonomy UE e i prossimi requisiti della CSRD stanno ridefinendo le esigenze di gestione dei dati e reporting, esercitando una pressione significativa sui ruoli manageriali e finanziari nel

settore delle costruzioni e dell'edilizia residenziale.

- **EU Taxonomy come Standard di Investimento:** la EU Taxonomy è diventata il benchmark per la finanza verde in tutta Europa. I partner riportano che sviluppatori di grandi dimensioni e istituzioni finanziarie dipendono sempre più da esperti tecnici in grado di dimostrare che progetti di ristrutturazione o nuove costruzioni soddisfano i Criteri Tecnici di Screening (ad es., prestazioni energetiche verificate, calcolo WLC) per accedere a prestiti preferenziali o attrarre investimenti.
- **Domanda di Dati CSRD:** la CSRD richiederà alle grandi aziende di rendicontare le proprie prestazioni di sostenibilità, includendo metriche verificabili su consumo energetico, emissioni di carbonio e uso delle risorse. Ciò crea una nuova, critica domanda di competenze in:
  - **Raccolta e Gestione Dati:** implementazione di sistemi digitali (BIM, Digital Twins, smart meter) per tracciare, verificare e controllare accuratamente i dati di performance lungo tutto il ciclo di vita degli asset.
  - **Reporting Integrato:** capacità di collegare dati tecnici di performance ambientale con sistemi di rendicontazione finanziaria.

Questo cambiamento conferma che il gap di competenze non è più limitato ai mestieri tecnici, ma si estende profondamente a ruoli di gestione, finanza e informazioni digitali.

La prossima Corporate Sustainability Reporting Directive (CSRD) rappresenta una trasformazione epocale nella responsabilità aziendale e nella trasparenza, in particolare per le grandi imprese operanti nell'ambito dell'UE. Questa normativa imporrà un nuovo livello di dettaglio e rigore nel reporting sulle prestazioni di sostenibilità, andando oltre le divulgazioni volontarie verso metriche standardizzate e vincolanti.

Al centro di questa trasformazione c'è una domanda senza precedenti di dati verificabili e di alta qualità su numerosi domini ambientali, sociali e di governance (ESG).

La direttiva richiede specificamente alle aziende di rendicontare un insieme completo di metriche quantificabili e verificabili, con particolare attenzione agli indicatori di performance ambientale quali:

- **Uso Energetico:** suddivisione dettagliata del consumo energetico per fonte (rinnovabile vs non rinnovabile) e per attività o impianto, richiedendo sofisticata gestione e aggregazione dei dati dai contatori.
- **Emissioni di Carbonio:** reporting completo su tutti e tre gli Scope (Scope 1: emissioni dirette; Scope 2: emissioni indirette da energia acquistata; Scope 3: tutte le altre emissioni indirette lungo la catena del valore), necessitando complesse metodologie di raccolta dati e calcolo della supply chain.
- **Consumo di Risorse:** dati verificabili sull'uso di risorse critiche, inclusi acqua (prelievo, consumo e scarico) e materiali, insieme a generazione di rifiuti e tassi di riciclo, sottolineando la necessità di sistemi robusti di gestione ambientale.

Questo rigoroso framework di reporting crea una nuova, critica domanda di competenze in grado di colmare il divario tra operazioni tecniche, reporting finanziario e strategia di sostenibilità. Le competenze richieste sono altamente specializzate e trasversali, concentrandosi su:

1. **Gestione e Governance Dati ESG:** expertise nella progettazione, implementazione e mantenimento dell'infrastruttura IT, database e framework di governance necessari per raccogliere, validare e proteggere grandi quantità di dati non finanziari.
2. **Accounting e Assurance di Sostenibilità:** professionisti capaci di applicare rigore contabile alle metriche di sostenibilità, garantendo dati verificabili, coerenti e conformi agli European Sustainability Reporting Standards (ESRS) e preparandosi per la revisione esterna obbligatoria.

3. **Modeling e Analisi del Rischio Climatico:** competenze per interpretare rischi fisici e di transizione legati al clima, integrarli nella pianificazione finanziaria aziendale e utilizzare i dati per modellare diversi scenari climatici (ad es., raccomandazioni TCFD).
4. **Mappatura della Catena del Valore e Raccolta Dati Scope 3:** capacità di tracciare e quantificare emissioni e impatti lungo catene di fornitura complesse e globali, spesso richiedendo stretta collaborazione con fornitori e l'applicazione di analisi avanzate.

## 5. Ecosistema Attuale delle Competenze e Gap

Questo capitolo, componente critica del Deliverable D2.2, fornisce una sintesi e un'analisi completa del panorama attuale nelle aree di interesse del progetto in tutti i paesi del consorzio. Il nucleo di questa analisi deriva dai risultati dettagliati dei "Rapporti Nazionali sullo Stato dell'Arte" presentati da ciascun partner.

Gli obiettivi principali di questa sintesi sono triplici:

1. **Revisione dei Quadri di Qualificazione Esistenti:** esaminare sistematicamente e confrontare i quadri di qualificazione nazionali, i programmi educativi e gli schemi di certificazione professionale attualmente in vigore nel settore energetico nei paesi del consorzio, inclusi i processi di allineamento attualmente in corso in paesi partner come l'Ucraina. Questa revisione comparativa mira a identificare strutture comuni, caratteristiche nazionali uniche e aree di potenziale allineamento o divergenza.
2. **Identificazione dei Gap di Competenze e Conoscenze:** individuare le lacune più urgenti e critiche di competenze e conoscenze che attualmente ostacolano l'innovazione, la crescita e la transizione efficace della forza lavoro nei rispettivi mercati energetici nazionali. Ciò include competenze tecniche, trasversali (soft) e normative essenziali per la transizione energetica.
3. **Definizione delle Barriere Chiave all'Upskilling: Diagnosticare e documentare** le principali barriere sistemiche, istituzionali e pratiche che impediscono l'adozione efficace e diffusa delle iniziative di upskilling e reskilling necessarie. Queste barriere possono includere la mancanza di infrastrutture formative adeguate, finanziamenti insufficienti, curricula obsoleti o resistenze al cambiamento.

Le evidenze consolidate e i risultati robusti presentati in questo capitolo costituiscono la base di prova cruciale e non negoziabile che **informerà direttamente e determinerà la direzione strategica** per lo sviluppo dei contenuti formativi nel successivo Work Package 4 (WP4): **Sviluppo di Curriculum e Formazione**.

### 5.1. Qualifiche Esistenti: Sintesi dei programmi VET e HE attuali correlati all'efficienza energetica.

Il panorama educativo attuale in Europa è altamente frammentato, riflettendo livelli diversi di integrazione tra i sistemi di Istruzione e Formazione Professionale (VET) e di Istruzione Superiore (HE). Sebbene la maggior parte dei paesi possieda qualifiche fondamentali nel settore costruzioni, l'integrazione di competenze specializzate green e digitali rimane incoerente.

Questa mancanza di armonizzazione genera incoerenze nel riconoscimento e nella trasferibilità delle qualifiche, influenzando la mobilità lavorativa e l'uniformità degli standard professionali in tutta Europa.

In particolare nel settore delle costruzioni, mentre le qualifiche fondamentali e tradizionali sono generalmente ben consolidate e riconosciute nella maggior parte dei paesi europei, inclusa l'Ucraina, esiste un gap cruciale riguardo l'integrazione sistematica di competenze specializzate vitali per un'industria moderna, sostenibile e digitalizzata. L'inclusione di green skills — come efficienza energetica, gestione sostenibile dei materiali, valutazione del ciclo di vita (LCA) e tecniche NZEB — rimane altamente incoerente.

Analogamente, l'integrazione delle competenze digitali — inclusi Building Information Modeling (BIM), tecnologie di costruzione intelligenti, data analytics e automazione — varia significativamente in profondità e ampiezza tra i diversi curricula nazionali. Questa disparità impedisce l'upskilling rapido della forza lavoro necessario per raggiungere gli ambiziosi obiettivi ambientali e tecnologici fissati dall'UE, come il Green Deal e la transizione verso l'Industry 4.0 nelle costruzioni.

- **Resilienza del Sistema VET:** le istituzioni VET rimangono la principale fonte di competenze tecniche on-site. Tuttavia, la velocità di aggiornamento dei curricula spesso è inferiore all'adozione tecnologica e alle stringenti richieste degli standard EPBD e ZEB.
- **Focus sull'Istruzione Superiore:** le università (HE) forniscono generalmente solide basi teoriche in design sostenibile, performance energetica e valutazione del ciclo di vita (LCA). La sfida consiste nel tradurre queste conoscenze teoriche in competenze pratiche, site-specific, necessarie per l'implementazione e il controllo qualità.
- **Necessità di Competenze Trasversali:** tutti i paesi riportano la necessità di qualifiche che superino i silos tradizionali, combinando efficienza energetica con strumenti digitali (BIM, smart monitoring) e principi di circolarità. Le qualifiche esistenti risultano spesso troppo ristrette o obsolete.

## 5.2. Identificazione dei Gap Critici di Competenze: Risultati consolidati sulle carenze di conoscenze e competenze più severe, categorizzate per profilo professionale.

La natura persistente e pervasiva del gap di competenze rappresenta una sfida sistemica che permea l'intera catena del valore edilizio, dalla progettazione iniziale e pianificazione fino alla costruzione, gestione, manutenzione e eventuale demolizione o retrofit.

Questa carenza critica non è isolata a un singolo mestiere o disciplina professionale, ma riguarda una moltitudine di stakeholder, inclusi architetti, ingegneri, operai edili, facility manager e responsabili politici.

Rapporti e analisi di settore hanno costantemente identificato carenze specifiche e quantificabili nelle conoscenze, competenze ed esperienze pratiche della forza lavoro attuale. Queste lacune ostacolano direttamente e significativamente la capacità dei diversi paesi e regioni — **dagli Stati membri UE ai contesti di ricostruzione come l'Ucraina** — di raggiungere con successo ambiziosi obiettivi ZEB e WLC.

Ad esempio, una mancanza di comprensione approfondita riguardo modellazione energetica avanzata, strategie passive di design, complessità di integrazione delle fonti rinnovabili (come fotovoltaico e pompe di calore), rigorosi requisiti di tenuta all'aria e mitigazione dei ponti termici è diffusa. Inoltre, le competenze necessarie per calcolare, minimizzare e gestire il carbonio incorporato durante tutto il ciclo di vita di un edificio — centrale per gli obiettivi WLC — sono spesso poco sviluppate o completamente assenti tra i decisori chiave e gli implementatori. Senza una strategia concertata ed efficace per colmare questo gap sistemico, la transizione verso un ambiente costruito veramente sostenibile e decarbonizzato rimarrà fortemente limitata.

**Gap per Segmento Professionale:**

- **Operai e Installatori On-Site (Livello VET):**
  - **Tenuta all'Aria e Ponti Termici:** gap universale e critico. La mancanza di precisione nell'installazione di isolamento, finestre e sistemi di ventilazione porta direttamente a scostamenti nelle prestazioni e non conformità agli standard NZEB.
  - **Sistemi Integrati:** gli installatori spesso non hanno competenze per installare e avviare sistemi integrati di riscaldamento, ventilazione ed energie rinnovabili (es. pompe di calore, integrazione PV) con controllo digitale.
  - **Gestione Qualità:** carenza di competenze pratiche e misurabili relative a verifica in cantiere e procedure di consegna.
- **Ingegneri, Architetti e Progettisti (Livello HE):**
  - **Life Cycle Assessment (LCA):** conoscenza teorica presente, ma applicazione pratica scarsa. Focus ancora centrato sull'energia operativa, non su carbonio incorporato e approvvigionamento materiali.
  - **BIM per la Sostenibilità:** mancanza di competenze nell'uso di BIM per modellazione energetica, rilevamento conflitti e specifica materiali sostenibili, oltre al semplice modello geometrico.
  - **Pianificazione Ristrutturazioni Complesse:** scarsa esperienza nella pianificazione di ristrutturazioni profonde e complesse, che integrino strutture storiche e comfort degli occupanti.
- **Ruoli Manageriali, Finanziari e di Data Management:**
  - **Reporting ESG e Taxonomy:** professionisti in finanza, real estate e asset management carenti nella valutazione tecnica di asset secondo i criteri EU Taxonomy e nella preparazione di dati verificabili per CSRD.
  - **Gestione Dati:** competenze richieste per gestire e utilizzare dati di performance da smart meter, sensori e Digital Twins per manutenzione predittiva e conformità verificabile.

### 5.3. Barriere all'Upskilling: Analisi degli ostacoli comuni alla formazione efficace.

Anche dove esistono programmi formativi, barriere sistemiche impediscono un upskilling efficace e scalabile:

- **Disponibilità e Rilevanza della Formazione:** sfida comune è che i programmi VET esistenti sono troppo lunghi, teorici o basati su metodologie obsolete (es. assenza di Work-Based Learning o laboratori digitali).
- **Costi e Tempo:** per le PMI, dominanti nel settore costruzioni, il costo di rilasciare i lavoratori per la formazione e la mancanza di tempo durante progetti attivi sono barriere proibitive. In Ucraina, ciò è ulteriormente aggravato dall'urgenza della ricostruzione degli edifici danneggiati, lasciando poco spazio per formazione tradizionale a lungo termine.
- **Capacità dei Formatori:** collo di bottiglia critico è la mancanza di formatori qualificati con expertise in tecnologie ZEB avanzate, strumenti BIM e principi di circolarità. Anche i formatori necessitano di upskilling significativo.

- **Mancanza di Certificazione e Standardizzazione:** l'assenza di certificazioni standardizzate e facilmente riconoscibili per competenze green/digital (come micro-credential) rende difficile per i datori di lavoro fidarsi dei risultati formativi e collegarli a premi salariali.

L'implementazione efficace di queste raccomandazioni è vitale per garantire che la forza lavoro europea possieda le competenze necessarie a raggiungere l'obiettivo Zero-Emission Building entro il 2050, traducendo concretamente l'ambizione normativa in performance verificabili in cantiere.

L'analisi contenuta nel D2.2 fornisce al progetto EXCEL4Housing 4.0 una base empirica essenziale e un punto di partenza fondamentale, convalidando l'importanza strategica dello sviluppo dei curricula VET successivi in WP4 per assicurare un futuro sostenibile al settore.

## 6. Digitalizzazione e Integrazione dell'Economia Circolare

La transizione verde è indissolubilmente legata alla transizione digitale. Raggiungere gli obiettivi di edilizia a emissioni zero richiede cambiamenti fondamentali non solo nei materiali e nei sistemi energetici, ma anche nella gestione dei dati, nella progettazione e nei processi di costruzione. Questo capitolo valuta lo stato attuale della digitalizzazione (Housing 4.0) e l'adozione dei principi dell'Economia Circolare (CE) nei paesi partner.

### 6.1. Stato della Transizione Digitale: Valutazione dei tassi di adozione degli strumenti digitali chiave nei paesi del consorzio.

La digitalizzazione è universalmente riconosciuta come fattore abilitante chiave per garantire prestazioni energetiche verificabili e semplificare processi di ristrutturazione complessi. Tuttavia, il livello di maturità di implementazione varia significativamente tra i paesi del consorzio.

#### A. Building Information Modelling (BIM) Adoption

Il BIM è lo strumento digitale più consolidato per promuovere integrazione e condivisione dei dati, ma il suo utilizzo è spesso limitato alla modellazione geometrica, piuttosto che a funzioni avanzate per la sostenibilità. Nel contesto ucraino, il BIM è sempre più riconosciuto come strumento vitale per una gestione trasparente ed efficiente della ricostruzione di larga scala, facilitando il monitoraggio dei materiali e delle prestazioni energetiche fin dalla fase di progettazione.

- **Mercati Maturi:** paesi come Finlandia e Svezia mostrano un livello di maturità superiore, dove il BIM è sempre più obbligatorio per i progetti pubblici e utilizzato per il coordinamento di progetti complessi.
- **Adozione Emergente:** in regioni come la Spagna, l'uso del BIM si sta espandendo oltre le nuove costruzioni fino ai progetti di ristrutturazione, utilizzato specificamente per modellazione energetica, clash detection e validazione dei requisiti di prestazione.
- **Gap di Capacità:** nonostante lo slancio nell'adozione, la Croazia segnala che, sebbene il BIM sia identificato come fattore chiave, il suo utilizzo diffuso e competente è ancora in fase iniziale, limitato dalla carenza di personale qualificato in simulazione energetica e specifica sostenibile.

#### B. Digital Twins e Gestione dei Dati

Il concetto di Digital Twins — repliche virtuali degli edifici alimentate da dati in tempo reale — è riconosciuto come il futuro della gestione degli asset e della verifica della conformità, ma rimane principalmente un focus innovativo piuttosto che una prassi standard.

- **Iniziative Strategiche:** in Germania, il governo ha istituito una “Road Map for Digital Design and Construction”, posizionando la digitalizzazione come strategia centrale per gestire la complessità e migliorare il controllo qualità nella Renovation Wave. Analogamente, l'Italia evidenzia partnership strategiche con il settore privato per accelerare l'adozione dei Digital Twin a supporto dell'efficienza e del reporting di sostenibilità.
- **Gap nei Dati di Prestazione:** una carenza importante in quasi tutti i paesi è la mancanza di competenze in **data governance** — la capacità di raccogliere, gestire e utilizzare i dati di prestazione provenienti da smart meter e sensori per colmare il divario tra prestazioni progettate e reali. Questa competenza è cruciale per soddisfare le richieste di reporting

## 6.2. Pratiche di Economia Circolare: Sintesi sull'implementazione di LCA, utilizzo di material passport e principi di design for disassembly.

La transizione da un modello economico lineare convenzionale — “take-make-dispose” — a uno fondamentalmente circolare non è semplicemente un'opzione, ma un imperativo critico per il settore costruzioni moderno.

Questo cambiamento, che pone forte enfasi sul riutilizzo dei materiali, sull'efficienza delle risorse, sulla riduzione dei rifiuti e sull'uso rigoroso del **Life Cycle Assessment (LCA)**, rappresenta la risposta strategica più efficace per mitigare l'impronta ambientale insostenibile dell'industria.

L'impatto ambientale del settore costruzioni è notoriamente significativo, caratterizzato principalmente da due problematiche:

1. **Generazione di Rifiuti:** il settore è tra i maggiori produttori globali di rifiuti, inclusi detriti da demolizione, materiali inutilizzati e imballaggi. Questo volume consistente mette enorme pressione sulle discariche e rappresenta una grande perdita di energia incorporata e risorse preziose che potrebbero essere mantenute nell'economia.
2. **Carbonio Incorporato:** la produzione, il trasporto e la lavorazione dei materiali da costruzione (cemento, acciaio, aggregati) sono altamente energivore e rilasciano grandi quantità di gas serra. Questo “carbonio incorporato” rappresenta una parte significativa dell'impatto climatico totale del settore, richiedendo strategie per ridurre l'intensità carbonica della produzione o, idealmente, eliminare la necessità di nuovi materiali primari tramite riuso e riciclo.

Un modello circolare affronta direttamente queste sfide, integrando principi che estendono la durata dei materiali e chiudono i cicli delle risorse. Obbligando il riutilizzo di componenti recuperati — pratica di estrema rilevanza in Ucraina per il riciclo dei detriti da edifici danneggiati dalla guerra —, promuovendo l'uso di contenuti riciclati e progettando edifici per la **decostruzione** piuttosto che per la demolizione, il settore può ridurre drasticamente la domanda di materie prime vergini e minimizzare la produzione di rifiuti. Inoltre, l'adozione di strumenti **LCA** permette di misurare olisticamente le prestazioni ambientali dei materiali e dei progetti edilizi lungo tutto il ciclo di vita, dal “cradle to grave” o idealmente “cradle to cradle”, garantendo decisioni ottimizzate per la sostenibilità.

### A. Whole-Life Carbon (WLC) e LCA

Il WLC emerge come metrica ultima, ampliando il focus dall'energia operativa al carbonio incorporato nei materiali e nei processi costruttivi.

- **Leadership Normativa:** la Svezia è pioniere, dove il National Climate Declaration Act ha reso obbligatorie le dichiarazioni WLC per i nuovi edifici dal 2022. Questo passo regolatorio forza immediatamente i progettisti a integrare strumenti LCA nelle prime fasi progettuali, influenzando direttamente la selezione dei materiali e l'approvvigionamento.
- **Consapevolezza Crescente:** altri paesi, come Portogallo e Spagna, stanno aumentando la presenza di LCA nelle discussioni politiche e nei progetti pilota, spesso collegati a green public procurement e strategie nazionali di economia circolare.

## B. Riutilizzo dei Materiali e Gestione dei Rifiuti

La transizione verso il riutilizzo dei materiali e il Design for Disassembly (DfD) resta l'aspetto logistico più sfidante, richiedendo cambiamenti radicali nelle catene di approvvigionamento e nei quadri normativi.

- **Iniziative Pilota:** in Belgio, le autorità regionali supportano attivamente la transizione circolare. Ad esempio, la Regione di Bruxelles utilizza strumenti come **TOTEM** per valutare l'impatto ambientale dei materiali e promuove la circolazione di elementi edilizi recuperati tramite progetti come FCRBE. La piattaforma TOTEM (Tool for Optimising the Total Environmental impact of Materials) funge da ambiente di supporto decisionale LCA in Belgio, sviluppato tramite collaborazione interregionale e federale. Integra dichiarazioni ambientali di prodotto (EPD) e dataset generici selezionati per consentire scelte comparative a livello di edificio e componente; è sempre più citata negli appalti pubblici e nella formazione. La base utenti — circa 4.400 utenti registrati, inclusi 600 architetti formati — indica una crescente professionalizzazione della pratica LCA, sebbene l'adozione non sia ancora universale.
- **In Ucraina,** gli sforzi attuali sono focalizzati sullo sviluppo di cluster regionali per il trattamento dei rifiuti minerali da costruzione, con l'obiettivo di reintegrare aggregati riciclati nella produzione di nuovi componenti edilizi residenziali.
- **Soluzioni Specifiche:** la Polonia mostra progressi tecnici di nicchia, in particolare nella gestione sostenibile dell'acqua, utilizzando sistemi di raccolta delle acque piovane e acque grigie per ridurre la domanda operativa.
- L'Italia evidenzia l'importanza crescente dei materiali sostenibili e a basso carbonio, in particolare il legno, come parte della roadmap circolare.
- **Gap di Competenze:** la carenza critica riguarda la mancanza di expertise in logistica inversa, verifica della qualità dei materiali e creazione di quadri contrattuali che facilitino il trasferimento e il riutilizzo di materiali riciclati certificati.

**Caso Polonia:** È importante sviluppare un piano considerando la redditività dei progetti. L'acqua recuperata viene spesso utilizzata per irrigazione; la domanda media di irrigazione in Polonia è relativamente bassa rispetto al resto d'Europa.

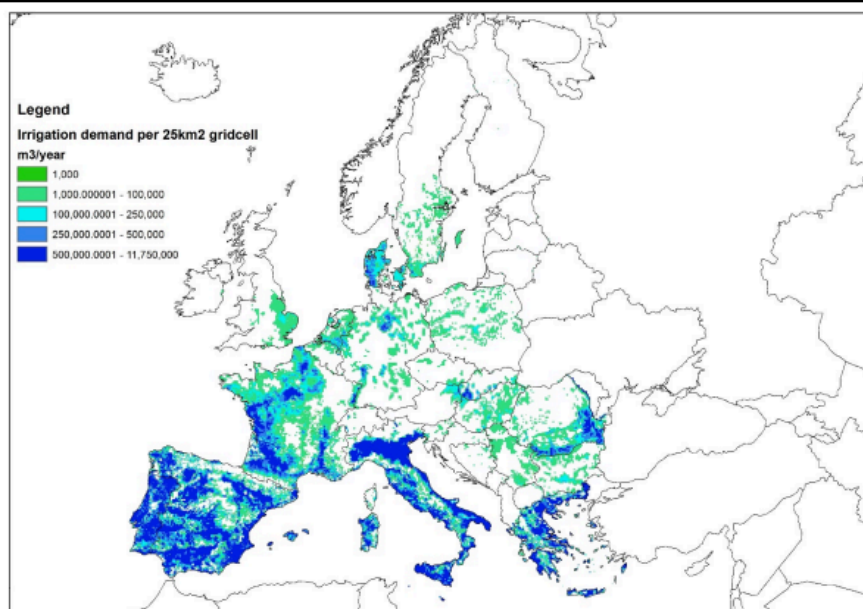


Figura 1. Domanda media di acqua per irrigazione, calcolata con EPIC

Il 22 giugno 2023, il Ministro delle Infrastrutture ha emesso un provvedimento per escludere il territorio nazionale dall'applicazione del Regolamento (UE) 2020/741 del Parlamento Europeo e del Consiglio, relativo ai requisiti minimi per il riuso dell'acqua.

Secondo il provvedimento, il riuso dell'acqua per irrigazione agricola non sarà applicato in nove bacini idrografici della **Polonia**, a causa di criteri di redditività considerando tutti i costi, ambientali e di risorsa; si è dimostrato che soluzioni alternative sarebbero più ottimali.

Il report italiano sottolinea l'importanza crescente dei materiali sostenibili e a basso carbonio, con focus sul legno, evidenziando:

- **Legno come Materiale Circolare:** il legno è definito “materiale circolare per eccellenza”, naturalmente rinnovabile, 100% riciclabile e capace di immagazzinare CO<sub>2</sub>, cruciale per mitigare i cambiamenti climatici.
- **Adozione Crescente di Timber Engineering:** trend in aumento nell'uso di sistemi costruttivi in legno come CLT (Cross-Laminated Timber) e LVL (Laminated Veneer Lumber).
- **Posizione di Mercato:** L'Italia è il terzo produttore europeo di case in legno (3.602 unità nel 2022), con crescita costante guidata dalla sensibilità alla sostenibilità.
- **Certificazione e Qualità:** schemi come ARCA e ReMade in Italy® supportano standard di qualità, durabilità e sostenibilità, favorendo lo sviluppo di un mercato strutturato per le costruzioni in legno.
- **Progetti Esemplari:** esempi concreti di eccellenza includono il quartiere “Ex Marangoni” a Rovereto (edificio CLT di 9 piani ad alta efficienza e circolarità) e il Trentino Social Housing Building a Trento (edificio in legno certificato ARCA), dimostrando l'applicazione su larga scala e ad alte prestazioni.

## 7. Conclusioni e Raccomandazioni

L'analisi State-of-the-Art condotta in tutti i paesi del consorzio — incluso il contesto unico della ricostruzione in Ucraina — rivela un consenso quasi universale: il settore edilizio **europeo si trova a un punto di svolta cruciale, caratterizzato da un forte ambizione normativa e da sfide di implementazione significative e radicate**. Questa doppia realtà definisce l'attuale contesto operativo.

Da un lato, le basi per la Transizione Verde sono saldamente stabilite da un robusto quadro legislativo dell'Unione Europea. Strumenti chiave come la Direttiva sulle Prestazioni Energetiche degli Edifici (EPBD), la EU Taxonomy e la Corporate Sustainability Reporting Directive (CSRD) forniscono collettivamente l'impulso necessario, fissando obiettivi ambiziosi per l'efficienza energetica, la decarbonizzazione e la divulgazione degli investimenti sostenibili. Queste normative sono progettate per guidare gli investimenti, accelerare le onde di ristrutturazione e promuovere cambiamenti sistemici lungo tutta la catena del valore, rendendo obbligatoria la transizione da un ambiente costruito lineare a uno circolare e a emissioni zero.

Dall'altro lato, la capacità attuale del settore di eseguire questa transizione essenziale è chiaramente limitata da una crisi diffusa e sistemica di competenze e capacità. Questo deficit è multifattoriale: comprende la carenza di personale qualificato lungo l'intero ciclo di vita dell'edificio — dagli architetti e ingegneri specializzati in ristrutturazioni profonde agli installatori certificati e ai lavoratori in cantiere formati sulle tecnologie moderne e altamente efficienti. Inoltre, la crisi supera la semplice carenza di manodopera, includendo anche deficit in competenze digitali, gestione integrata della supply chain e capacità finanziarie e amministrative necessarie per affrontare regolamenti complessi e ottenere finanziamenti su larga scala. Senza interventi urgenti e coordinati per colmare queste lacune, gli obiettivi ambiziosi fissati dal quadro normativo UE rischiano di diventare irraggiungibili, creando un significativo divario tra intenzioni politiche e realtà operativa.

### 7.1. Sintesi Chiave: Conclusione finale sui principali problemi e sulle carenze sistemiche di competenze osservate

Il risultato centrale di questo rapporto D2.2 è il disallineamento tra requisiti normativi di alto livello e capacità di implementazione in cantiere.

#### A. Driver Normativi Non-Negoziabili

Il mercato non è più guidato esclusivamente dai costi o dalla domanda dei consumatori, è diretto da obblighi legislativi inderogabili:

- a. **Standard Zero-Emission Building (ZEB):** questi standard richiedono un approccio completo alle prestazioni dell'edificio, richiedendo sistemi integrati e tenuta all'aria verificabile, particolarmente nei mercati come Germania, Polonia e Ucraina, dove l'allineamento agli standard ZEB sta diventando un pilastro dei piani nazionali di ripresa. Il National Building Renovation Plan (NBRP) tedesco delinea obiettivi dettagliati e misure politiche per supportare la transizione verso un patrimonio edilizio a emissioni zero entro il 2050.
- b. **Conformità Finanziaria:** la EU Taxonomy e la CSRD hanno elevato la sostenibilità da

questione tecnica a rischio finanziario, richiedendo nuove competenze nel reporting aziendale e nella gestione dati verificabile per proprietari di asset e finanziatori, specialmente in mercati con settori finanziari forti come Svezia e Italia.

## B. Collo di Bottiglia Sistemico delle Competenze

L'analisi conferma un deficit critico e diffuso di competenze, che si manifesta su due fronti:

1. **Technical Precision Gap:** la carenza tecnica più urgente riguarda l'installazione e il collaudo di sistemi integrati, e il raggiungimento di elevati standard di tenuta all'aria e mitigazione dei ponti termici. Fallimenti in queste aree causano direttamente il performance gap (differenza tra consumo progettato e reale), compromettendo la conformità ZEB in paesi come Grecia, Croazia e Ucraina, dove l'ampiezza dei progetti di restauro rende questo gap ancora più critico per la resilienza urbana a lungo termine.
2. **Digital/Circular Strategy Gap:** le competenze necessarie per gestire la transizione mancano lungo tutta la catena del valore. Ciò include l'uso esperto di BIM per calcoli LCA e WLC (critico in Svezia) e la capacità di gestire logistica inversa complessa e certificazione dei materiali per un modello di Economia Circolare.

## C. Barriere per un rapido upskilling

La transizione è ostacolata dall'inerzia educativa: i curricula VET esistenti sono spesso troppo lenti da aggiornare, e la formazione è inaccessibile per una forza lavoro dominata da PMI a causa di vincoli di costi e tempi (citati da Portogallo e Germania). La capacità limitata dei formatori su materie moderne e interdisciplinari costituisce un collo di bottiglia critico per scalare le competenze.

Il risultato centrale del rapporto è il profondo e pericoloso divario tra i mandati legislativi ambiziosi dell'UE per una transizione verde e digitale e la capacità sistemica del settore costruzioni di eseguirli in cantiere.

Questo deficit di implementazione è riconducibile a un doppio collo di bottiglia delle competenze: **Technical Precision Gap** tra professionisti VET su sistemi energetici integrati, tenuta all'aria e ponti termici, che causa direttamente il performance gap energetico, e **Digital/Circular Strategy Gap** tra ruoli HE/manageriali, caratterizzato da mancanza di competenze nell'uso di strumenti digitali (BIM/LCA) per calcoli WLC e nella preparazione di dati verificabili per reporting finanziario obbligatorio.

La sfida è aggravata dall'inerzia educativa, inclusi curricula VET obsoleti e grave carenza di formatori qualificati, ostacolando l'upskilling rapido necessario per rispettare scadenze normative inderogabili.

## 7.2. Raccomandazioni per WP4: Raccomandazioni chiare e operative per lo sviluppo del nuovo curriculum VET

Sulla base della sintesi delle tendenze di mercato, delle pressioni normative e dei deficit critici di competenze, vengono presentate le seguenti raccomandazioni per la progettazione e l'implementazione del nuovo curriculum VET nell'ambito del WP4:

Sulla base di una sintesi completa e di un'analisi rigorosa delle tendenze di mercato attuali nei settori dell'energia e della sostenibilità, delle pressioni normative vigenti e dei deficit critici di competenze individuati nella forza lavoro esistente, vengono proposte le seguenti raccomandazioni strategiche dettagliate.

Queste raccomandazioni sono progettate per informare e guidare lo sviluppo, la struttura e l'implementazione del nuovo curriculum di Istruzione e Formazione Professionale (VET), che sarà un deliverable chiave del Work Package 4 (WP4).

### Raccomandazione 1: Dare priorità alle competenze integrate a livello di sistema

Il curriculum deve passare dalla formazione di lavoratori isolati alla formazione di professionisti in grado di integrare sistemi.

- **Focus:** la formazione dovrebbe concentrarsi sulle interfacce tra i sistemi (ad esempio, integrazione dell'isolamento con la ventilazione meccanica e le fonti rinnovabili).
- **Target:** Installatori, Site Manager e Revisori del Progetto devono essere formati sull'impatto del loro lavoro sulle prestazioni complessive dell'edificio (ad esempio, il collegamento diretto tra una sigillatura difettosa e la classificazione EPC).

### Raccomandazione 2: Integrare la digitalizzazione per conformità e utilizzo dei dati

La alfabetizzazione digitale deve essere obbligatoria, spostando il focus dal 'BIM per il disegno' al 'BIM per la conformità'.

- **Azione:** sviluppare moduli su BIM per simulazioni energetiche e LCA per supportare le decisioni progettuali.
- **Nuovo profilo:** creare un percorso formativo chiaro per ESG/Taxonomy Data Manager—professionisti in grado di collegare i dati tecnici delle prestazioni dai digital twin con le esigenze legali/finanziarie del CSRD.

### Raccomandazione 3: Sviluppare micro-credenziali certificate per l'upskilling urgente

Per superare le barriere di tempo e costo, il progetto deve produrre unità di formazione brevi, flessibili e certificate.

- **Focus:** concentrarsi sulle micro-credenziali per attività ad alto rischio e alto impatto come: test e tecniche di sigillatura per l'ermeticità, installazione e messa in servizio di pompe di calore, e approvvigionamento dei materiali WLC.
- **Modello:** utilizzare un approccio di apprendimento modulare e flessibile che permetta ai lavoratori di ottenere la certificazione rapidamente senza un impegno a lungo termine (ad esempio, la struttura 'Learning Unit' citata nel rapporto del Belgio).

### Raccomandazione 4: Avviare un programma di 'Formazione dei formatori'

Il collo di bottiglia più immediato è la capacità dei formatori. Il curriculum WP4 deve essere sperimentato

e implementato formando prima i formatori che erogheranno i contenuti a livello nazionale.

- **Gruppo target 1:** Formatori VET nei settori energia e costruzione.
- **Gruppo target 2:** Istruttori provenienti da cluster industriali e associazioni professionali (ad esempio, quelli che collaborano con la Fundación Laboral de la Construcción in Spagna o le reti professionali coinvolte nell'iniziativa '#100 Workshops' in Ucraina).

#### **Raccomandazione 5: Utilizzare Living Labs e apprendimento basato sul lavoro (WBL)**

L'efficacia della formazione in aree complesse (come la ristrutturazione profonda) è scarsa se erogata solo teoricamente.

- **Metodologia:** la formazione deve essere pratica, utilizzando ambienti 'Living Lab' o dimostrativi (ad esempio, come citato nell'approccio finlandese e nei centri di formazione specializzati in fase di ammodernamento in Ucraina) che simulino le condizioni reali del cantiere per il controllo qualità e l'installazione integrata dei sistemi.
- **Certificazione:** la certificazione dovrebbe basarsi sulla dimostrazione pratica delle competenze in un contesto WBL, piuttosto che su esami puramente teorici.

## 8. Bibliografia

La bibliografia sottostante include una selezione di fonti autorevoli citate nel corso del rapporto D2.2, basandosi su documenti di politica dell'UE, legislazione nazionale e rapporti affidabili dei partner del consorzio, enti di settore e istituti di ricerca.

**Citazione:** European Commission (EC)

**Titolo:** Direttiva (UE) 2018/844 del Parlamento Europeo e del Consiglio del 30 maggio 2018 che modifica la Direttiva 2010/31/UE sulle prestazioni energetiche degli edifici e la Direttiva 2012/27/UE sull'efficienza energetica.

**Fonte/Editore:** Gazzetta ufficiale dell'Unione Europea

**Data:** 2018

**Citazione:** European Commission (EC)

**Titolo:** Proposta di Direttiva del Parlamento Europeo e del Consiglio sulle prestazioni energetiche degli edifici (rifusione) (EPBD Recast).

**Fonte/Editore:** Commissione Europea, COM/2021/802 final

**Data:** 2021

**Citazione:** European Commission (EC)

**Titolo:** Regolamento sulla Tassonomia (Regolamento (UE) 2020/852) e Atti Delegati sulla mitigazione e adattamento ai cambiamenti climatici.

**Fonte/Editore:** Gazzetta ufficiale dell'Unione Europea

**Data:** 2020/2021

**Citazione:** Parlamento Europeo e Consiglio

**Titolo:** Direttiva sulla Rendicontazione di Sostenibilità Aziendale (CSRD) (Direttiva (UE) 2022/2464).

**Fonte/Editore:** Gazzetta ufficiale dell'Unione Europea

**Data:** 2022

**Citazione:** Direzione Generale per l'Energia (EC)

**Titolo:** The Renovation Wave for Europe - Rendere verdi i nostri edifici, creare posti di lavoro, migliorare la vita.

**Fonte/Editore:** Commissione Europea, COM/2020/662 final

**Data:** 2020

**Citazione:** Eurostat

**Titolo:** Prestazioni energetiche degli edifici: attività di costruzione e tassi di ristrutturazione.

**Fonte/Editore:** Rapporti statistici

**Data:** In corso (ultimi dati disponibili per 2024/2025)

**Citazione:** FCRBE (Facilitating the Circulation of Reclaimed Building Elements)

**Titolo:** Analisi del Material Passport e degli Strumenti di Circularità (Riferimento Strumento TOTEM).

**Fonte/Editore:** Documentazione Progetto FCRBE (Interreg NWE)

**Data:** 2021

**Citazione:** Confidencial Imobiliário (Portogallo)

**Titolo:** Analisi di Mercato: Sostenibilità ed Efficienza Energetica nei Nuovi Progetti Abitativi (Q1 2025).

**Fonte/Editore:** Rapporto di settore (citato dal partner portoghese)

**Data:** 2025

**Citazione:** Swedish National Board of Housing, Building and Planning (Boverket)

**Titolo:** Attuazione e linee guida della National Climate Declaration Act.

**Fonte/Editore:** Quadro normativo e linee guida per l'implementazione

**Data:** 2022

**Citazione:** DG Research & Innovation (JRC)

**Titolo:** Competenze per la Transizione Verde: Sfide e Opportunità nel Settore delle Costruzioni.

**Fonte/Editore:** Commissione Europea, Joint Research Centre (JRC) Report

**Data:** 2023

**Citazione:** Rapporti Nazionali (Partner del Consorzio)

**Titolo:** State-of-the-Art National Reports per EXCEL4HOUSING 4.0 (Compilazione di **11 rapporti nazionali** da Belgio, Croazia, Finlandia, Germania, Grecia, Italia, Polonia, Portogallo, Spagna e Svezia).

**Fonte/Editore:** Deliverable interni del progetto EXCEL4HOUSING 4.0

**Data:** 2025

## 9. Annexes

### Annex 1: State-of-the-Art National Report - Belgium



# REPORT ON THE STATE OF THE ART

Belgium

- Introduction

This report delivers a state-of-the-art analysis of Belgium's construction sector with a focus on energy-efficient housing, sustainable construction, digitalisation (Housing 4.0), and the circular economy, and examines the resulting qualification needs, evolving skill requirements, and emerging job profiles. The analysis is designed to inform WP4 by identifying implications for VET curricula, upskilling pathways, and credentialing.

Methodologically, the study follows the EXCEL4HOUSING4.0 desk-research guidelines, applying an eligibility checklist to ensure that sources are recent (2018+), relevant (sustainability, digitalisation, VET innovation, labour market trends), credible (peer-reviewed work, national statistics, or authoritative policy documents), and accessible for dissemination. At least ten national sources were included (see Annex), complemented by up-to-date EU legislation and recognised statistical and policy publications.

The inquiry is organised as follows. First, we situate Belgium within the European transition context shaped by the recast Energy Performance of Buildings Directive (EPBD, 2024), the Renovation Wave, and the EU Taxonomy (European Commission, 2020; European Commission, 2024; European Union, 2024). Second, we unpack Belgium's multi-level regulatory architecture, noting the interaction between federal responsibilities and regional frameworks in Flanders, Wallonia, and the Brussels-Capital Region (Public Service of the Walloon Region, 2024; Brussels Environment, 2025). Third, we assess market dynamics, contrasting pressures in new-build with opportunities in renovation and infrastructure (FIEC, 2025; ING Economics, 2024). Fourth, we synthesise the skills and employment implications of the green and digital transitions (FPS Health et al., 2023). Finally, we develop VET-oriented recommendations around digital and circular competencies, procurement levers, and living-lab partnerships (BBRI & BIM4D, 2024; FCRBE, 2021; Vlaamse Overheid, n.d.).

- Analysis summary

**European policy frame.** Buildings account for roughly 40% of EU final energy use and 36% of GHG emissions, positioning the built environment at the centre of the EU's 2050 climate-neutrality objective (European Commission, 2024). The EPBD (2024 recast) requires national renovation plans, minimum energy-performance standards, and large-scale skills measures; together with the Renovation Wave and EU Taxonomy, this creates a coherent regulatory-financial architecture that cascades into national and regional programmes (European Commission, 2020; European Union, 2024).

**Belgian regulatory landscape.** Belgium's federal-regional governance yields divergent but complementary implementation pathways. Wallonia tightened EPB rules (2013/2017/2019) and aligned new-build with NZEB since 2021 (Public Service of the Walloon Region, 2024). Flanders couples obligations with market signals via the renovation obligation (post-purchase EPC E/F → to D within five years) for residential—and analogous rules for non-residential (Vlaamse Overheid, n.d.). Brussels-Capital Region advances the RENOLUTION agenda, combining energy/circular targets with financial premiums and technical support (Brussels Environment, 2025; Urban.brussels, 2022). Fragmentation allows policy tailoring but complicates national skills harmonisation and procurement alignment (FPS Health et al., 2023).

**Market dynamics.** The sector employs 600k+ workers and mobilised ~€41 bn in 2024 (FIEC, 2025). New residential construction contracted amid higher interest rates and input costs; renovation and infrastructure expanded, pulled by policy incentives and high energy prices (FIEC, 2025; ING Economics, 2024). With ~85% of dwellings below 2050 standards, renovation rates must roughly quadruple, implying sustained demand for energy-efficiency services and delivery capacity (ING Economics, 2024).

**Digitalisation (Housing 4.0).** BIM adoption is voluntary and concentrated in larger clients/projects; SME uptake is slowed by cost, standards, and ROI uncertainties (BBRI & BIM4D, 2024). TOTEM anchors LCA practice in Belgium and is increasingly referenced in procurement and training; targeted micro-incentives (e.g., Brussels' TOTEM premium) can unlock adoption (FCRBE, 2021; Renolution.brussels, n.d.). The shift from document-centric to data-centric delivery elevates demand for BIM/LCA fluency across roles (BBRI & BIM4D, 2024).

**Circular economy.** Circular Flanders and Circular Wallonia institutionalise pilots, learning networks, and value-chain interventions (Confederation of the Construction Industry & OVAM, 2021; Walloon Government, 2021). Practices such as design-for-disassembly, selective deconstruction, reuse logistics, and materials passports are maturing, with FCRBE translating reuse into impact assessment workflows in line with EN 15804/EN 15978 (FCRBE, 2021). Market frictions persist (standards, liability, reverse logistics), but price volatility since 2022 strengthens the business case for reuse (ING Economics, 2024; FIEC, 2025).

**Employment and skills.** Net job effects to 2030 are modestly positive ( $\approx 1$ –1.7%), yet highly uneven across occupations (FPS Health et al., 2023). Demand grows for hybrid roles—e.g., Retrofit Coordinators (BIM-LCA), BIM Managers, LCA specialists, deconstruction planners—while traditional roles require digital and circular upskilling (BBRI & BIM4D, 2024; FPS Health et al., 2023). The binding constraint is workforce capability rather than headline job counts.

**Cross-cutting opportunity.** The BIM–LCA–procurement nexus is the most powerful lever: BIM objects enriched with EPD/circularity attributes and TOTEM thresholds can steer low-carbon, circular choices and create a traceability loop for EU-Taxonomy-grade reporting (BBRI & BIM4D, 2024; European Commission, 2020; FCRBE, 2021).

Implications for WP4. Priority actions include:

- embedding BIM-LCA literacy as a baseline across VET;
- building stackable micro-credentials for NZEB retrofit/heat pumps/BIPV/automation;
- operationalising living labs with Green Deal and RENOLUTION pilots;
- harmonising competence frameworks inter-regionally; and
- using public procurement to reward verifiable digital/circular competencies (BBRI & BIM4D, 2024; Vlaamse Overheid, n.d.; Brussels Environment, 2025; FPS Health et al., 2023).

## 1. Introduction

This report presents a state-of-the-art analysis of Belgium's construction sector, with a focus on energy-efficient housing, sustainable construction, digitalisation, and the circular economy. It also **considers** the evolving landscape of qualifications, skill requirements, and emerging job profiles.

The analysis employs a structured desk-research methodology following the *EXCEL4HOUSING4.0* guidelines, relying on an eligibility criteria checklist to ensure that sources are:

- Recent (2018 or later);
- Relevant (covering sustainability, digitalisation, innovation in vocational education and training (VET), labour market trends, and job profiles);
- Credible (peer-reviewed studies, national statistics, or authoritative policy documents); and
- Accessible for dissemination within WP4 of the project.

At least ten national sources were selected (see Annex), and findings were synthesised into a narrative exploring the regulatory framework, market dynamics, technological innovations, circular economy initiatives, and cross-cutting opportunities for VET modernisation.

## 2. General Context: The European Construction Sector & Energy Transition

Buildings account for approximately 40% of the European Union's (EU) energy consumption and 36% of greenhouse gas (GHG) emissions (European Commission, 2024). Consequently, the EU has prioritised building decarbonisation as a cornerstone of its climate-neutrality goal for 2050.

The revised Energy Performance of Buildings Directive (EPBD, 2024) introduces significant changes, obliging Member States to adopt national renovation plans, implement minimum energy performance standards, and ensure large-scale training of skilled workers (European Commission, 2024). These reforms are embedded within the European Green Deal (2019), the Renovation Wave strategy (2020), and the EU Taxonomy on Sustainable Finance (2021), which together provide a coherent regulatory and financial framework for a greener built environment (European Commission, 2021).

For Belgium, the implications are particularly complex given its federal governance structure, with Flanders, Wallonia, and the Brussels-Capital Region each responsible for implementing EPBD transposition and related building codes (Public Service of the Walloon Region, 2020).

## 3. Policy and Regulatory Landscape in Belgium

Belgium's regulatory framework for sustainable construction is shaped not only by the European Union's climate and energy policies but also by the country's federal governance structure, which allocates substantial responsibility for energy and construction policies to its three regions: Flanders, Wallonia, and the Brussels-Capital Region. This decentralised model results in a fragmented regulatory landscape, where regional governments interpret and transpose EU directives into their own distinct building codes and support schemes.

The Walloon Region has progressively revised its transposition of the Energy Performance of Buildings Directive (EPBD) in 2013, 2017, and 2019, gradually tightening energy performance requirements for both public and private buildings (Public Service of the Walloon Region, 2020). These revisions introduced

obligations for building permits to include initial and final energy performance statements, while accredited experts were required to complete training and pass examinations to maintain professional certification. The 2019 reinforcement for public buildings and the 2021 update applying to all new constructions aligned Wallonia with the EU's nearly-zero-energy building (NZEB) standards, marking a decisive shift towards higher performance thresholds (Public Service of the Walloon Region, 2020).

Flanders has pursued a somewhat more ambitious trajectory, linking regulatory obligations to financial incentives for renovation. The “renovation obligation” introduced in 2022 requires purchasers of poorly performing residential buildings (Energy Performance Certificate category E or F) to undertake energy renovation within five years, thus directly mobilising the housing market for climate objectives (Flemish Government, 2022). The Brussels-Capital Region, meanwhile, has adopted a framework centred on its Renovation Strategy (2021–2030), which seeks to renovate 100,000 buildings by 2030 and provides financial premiums and technical assistance to both households and SMEs (Brussels Environment, 2021).

These regulatory divergences highlight both the strength and weakness of Belgium's federal model. On the one hand, regions can tailor measures to their socio-economic and housing contexts. On the other, fragmentation creates challenges for national coordination, particularly in developing coherent training standards for the construction workforce (FPS Health & Partners, 2023).

At the European level, Belgium's regional frameworks are embedded within broader EU policies, notably the Renovation Wave strategy, which aims to double the annual renovation rate by 2030, and the EU Taxonomy Regulation, which mandates sustainability disclosures from large companies and financial institutions (European Commission, 2021). These instruments serve as drivers of green financing, life-cycle assessment integration, and workforce upskilling investments, reinforcing regional obligations and aligning Belgium with the EU's 2050 decarbonisation pathway.

#### 4. Market Dynamics and Key Trends in Belgium

The construction sector in Belgium represents a cornerstone of the national economy, employing over 600,000 workers and mobilising approximately €41 billion in investments in 2024 (FIEC, 2025). Yet, the sector faces a paradigm shift, driven by the combined pressures of macroeconomic instability, climate obligations, and demographic housing needs.

On the demand side, new residential construction has entered a period of contraction. Rising interest rates, increased construction costs, and persistent inflation in raw materials (notably cement, bricks, and steel) have contributed to a slowdown in building permits and a decline of around 7% in new housing activity in 2023 (FIEC, 2025). Simultaneously, bankruptcies in the sector have reached record levels, reflecting the vulnerability of SMEs that dominate the Belgian construction ecosystem (ING, 2024).

By contrast, renovation and infrastructure segments are expanding. This growth is largely attributable to policy instruments such as the Flemish renovation obligation and financial support under Brussels' Renovation Strategy, which stimulate household investment in energy-efficient upgrades (Flemish Government, 2022; Brussels Environment, 2021). Moreover, high energy prices following the energy crisis of 2022–2023 created strong incentives for homeowners to reduce consumption through insulation, heat pumps, and solar PV installations (ING, 2024).

The long-term structural challenge is formidable: approximately 85% of Belgian homes do not meet the 2050 energy standards, implying that the current renovation rate must quadruple if Belgium is to comply with EU targets (ING, 2024). This figure underscores not only the scale of technical transformation required but also the labour and skills bottlenecks the sector will face in scaling up renovation capacity.

In addition, Belgium's construction market is experiencing contradictory trends: while demand for renovation rises, financial and operational barriers persist. Contractors are confronted with higher input prices, limited availability of sustainable materials, and increasing complexity in project delivery due to digital and circular requirements (FIEC, 2025). Thus, the sector stands at a crossroads, where policy-driven demand collides with market-based constraints, shaping a volatile but opportunity-rich environment.

## 5. Impact of Green and Digital Transitions on Employment

The dual transitions—the green transition towards climate neutrality and the digital transition driven by Housing 4.0 technologies—are exerting profound impacts on the Belgian labour market for construction.

The Federal Climate-Neutral Transition Report projects modest net employment gains of 1–1.7% by 2030, equivalent to approximately 13,000–22,000 jobs (FPS Health & Partners, 2023). However, this aggregate figure conceals substantial sectoral and occupational disparities. The report distinguishes three categories of labour market effects:

- Emerging roles: New occupations directly linked to the energy transition are arising, including deep energy renovation coordinators, BIM managers, and life-cycle assessment specialists. These roles are knowledge-intensive and demand hybrid expertise at the intersection of technical, digital, and environmental skills (FPS Health & Partners, 2023).
- Existing jobs requiring new green skills: Traditional construction roles, such as architects, engineers, electricians, and HVAC technicians, are undergoing skill transformation. These professionals must integrate energy-efficiency standards, digital modelling, and circular economy practices into their workflows, requiring both initial training reform and continuous professional development (BBRI & BIM4D, 2024).
- Jobs largely unaffected: A segment of the labour market—such as administrative and non-technical support roles—remains relatively insulated from transition pressures, though digitalisation may still influence job organisation and efficiency (FPS Health & Partners, 2023).

The overarching challenge is not the quantity of jobs, but the quality and content of work. The convergence of green and digital megatrends is accelerating job polarisation: high-skilled professionals benefit from demand for expertise, while middle-skilled workers risk displacement unless supported by life-long learning and upskilling pathways (FPS Health & Partners, 2023).

This transformation has significant implications for Belgium's VET and higher education systems. To avoid bottlenecks, Belgium must develop flexible, modular curricula that allow rapid requalification, particularly in renovation techniques, BIM-based design, energy storage integration, and selective deconstruction.

Without these reforms, the labour market risks failing to meet the quadrupled renovation demand by 2050, creating not only an economic shortfall but also a regulatory compliance gap with EU climate targets (ING, 2024; European Commission, 2024).

## 6. Thematic Analysis of State-of-the-Art

### 6.1 Digitalisation in Construction (Housing 4.0)

#### Key technologies and infrastructures

Digitalisation in Belgium coalesces around Building Information Modelling (BIM), life-cycle assessment (LCA) ecosystems (notably TOTEM), and a widening constellation of smart design and asset-management platforms (BBRI & BIM4D, 2024; FCRBE, 2021). BIM remains voluntary and is most prevalent in large and complex projects—public facilities, infrastructure, and multi-lot developments—where coordination, clash detection, and cost control yield clear returns on investment (BBRI & BIM4D, 2024). Public clients occasionally require BIM at tender stage, but in the absence of national mandates, standards, or subsidies, diffusion into SMEs is uneven and slow (BBRI & BIM4D, 2024).

The TOTEM platform (Tool for Optimising the Total Environmental impact of Materials) functions as Belgium's reference LCA decision-support environment, developed through inter-regional and federal collaboration. TOTEM integrates environmental product declarations (EPDs) and curated generic datasets to enable comparative design choices at building and component level; it is increasingly referenced in public procurement and training offers (FCRBE, 2021). The user base—~4,400 registered users, including ~600 trained architects—indicates growing professionalisation of LCA practice, even if adoption remains far from universal (FCRBE, 2021).

A complementary digital layer is emerging around compliance tooling (e.g., EPB/EPB-like software), materials databases, and procurement checkers that translate policy targets (NZEB, circularity criteria) into measurable design constraints. When these tools interoperate with BIM environments (IFC-based exchanges) and with TOTEM's impact models, they form a proto-“digital thread” that spans planning → design → procurement → construction → operation → end-of-life (BBRI & BIM4D, 2024; FCRBE, 2021).

#### Adoption patterns, barriers, and enabling conditions

Belgian diffusion of digital construction technologies exhibits a dual market:

- Leaders—large contractors, multi-disciplinary engineering practices, and public owners—use BIM for 4D/5D scheduling, cost control, and risk management, and they increasingly interface with LCA workflows for low-carbon design (BBRI & BIM4D, 2024).
- Followers—SMEs and specialty trades—cite cost of software and training, uncertain client demand, fragmented standards, and opaque ROI as adoption barriers (BBRI & BIM4D, 2024).

Policy micro-incentives (e.g., the Brussels TOTEM premium of up to €200 per housing unit in renovation design studies) show that targeted signals can stimulate uptake where capital constraints are binding (VB Interreg, 2021). However, absent mandates, diffusion remains contingent on client requirements, supply-chain coordination, and availability of qualified staff (BBRI & BIM4D, 2024).

#### Labour market and professional profiles

Digitalisation is re-shaping occupational taxonomies. Demand is rising for BIM coordinators, BIM managers, digital construction managers, information authors/checkers, LCA specialists, and digital-twin engineers who can bridge data modelling, building physics, and procurement (BBRI & BIM4D, 2024). In parallel, traditional roles (architects, site managers, quantity surveyors) increasingly require data literacy, model interrogation, and LCA interpretation skills (FPS Health & Partners, 2023; BBRI & BIM4D, 2024). The net effect is a shift from document-centric to data-centric project delivery, with implications for competence frameworks, CPD pathways, and assessment modalities in VET and higher education (FPS Health & Partners, 2023).

### Systemic gaps

Three structural gaps persist:

- Standards and interoperability: Non-mandatory BIM and heterogeneous data schemas impede model reuse across project phases and regions (BBRI & BIM4D, 2024).
- Evidence of ROI for SMEs: Limited Belgium-specific cost–benefit evidence for small firms slows investment (BBRI & BIM4D, 2024).
- Talent pipeline: Shortages in BIM/LCA educators and workplace mentors constrain scaling of digital skills (FPS Health & Partners, 2023).

## 6.2 Circular Economy and Sustainable Construction Materials

### Policy frameworks and collective action

Belgium stands out as an EU frontrunner in circular construction through Circular Flanders and Circular Wallonia, each combining strategic agendas with practice-based coalitions (Confederation of the Construction Industry & OVAM, 2021; Walloon Government, 2021).

- Circular Flanders coordinates a strategic agenda to 2061 anchored in ten working paths and rolling action programmes that enrol firms, municipalities, and knowledge institutions (Confederation of the Construction Industry & OVAM, 2021). The Green Deal Circular Construction convenes 300+ signatories to run pilots, exchange data, and mainstream circular practices (Vlaamse Overheid, 2022).
- Circular Wallonia (2021) designates construction as a priority value chain, deploying calls for projects (e.g., €600k in 2021) and taskforces that support industrial symbiosis, selective deconstruction, and re-manufacturing (Walloon Government, 2021).

### Practices, tools, and standards

Circular practices increasingly include design-for-disassembly, selective deconstruction, component reuse, materials passports, and high-value recycling, with TOTEM providing the LCA backbone for comparative

assessment of design variants and materials (FCRBE, 2021). The FCRBE project has been pivotal in operationalising reuse, documenting market actors for reclaimed components, and mapping how circularity indicators can be integrated into impact tools in line with EN 15804 and EN 15978 (FCRBE, 2021).

### **Market formation and bottlenecks**

Belgium's circular construction market is thickening through public procurement pilots, regional premiums, and knowledge networks, but frictions persist: fit-for-purpose standards for reclaimed elements, liability and warranty frameworks, quality grading, and logistics for reverse flows (Confederation of the Construction Industry & OVAM, 2021). Cost pressures and supply-chain disruptions since 2022 have paradoxically strengthened the business case for reuse—as price volatility makes material circularity a risk-hedging strategy (ING, 2024; FIEC, 2025).

### **Skills and professionalisation**

Circularity accelerates demand for reuse logisticians, materials auditors, circular procurement managers, deconstruction planners, and LCA/circular design consultants (FPS Health & Partners, 2023). Site teams need competences in selective dismantling, contamination assessment, and documentation for passports, while designers must integrate reversible detailing and inventory-led design (FPS Health & Partners, 2023; FCRBE, 2021).

## **7. Cross-Cutting Analysis & Opportunities**

### **Digital–circular convergence**

The most promising frontier is the coupling of BIM and LCA—with TOTEM as the impact engine—to enable design-for-disassembly, materials passports, and circular procurement at scale (BBRI & BIM4D, 2024; FCRBE, 2021). BIM objects enriched with EPD attributes, reusability flags, and end-of-life scenarios can be federated into project-level impact dashboards that steer low-carbon, circular choices during design and tendering (BBRI & BIM4D, 2024). This creates a traceability loop across the asset life cycle, facilitating quality assurance and finance-grade reporting under the EU Taxonomy (European Commission, 2021).

### **Persistent barriers**

- Regulatory fragmentation across regions complicates national alignment of digital/circular requirements and qualification standards (FPS Health & Partners, 2023).
- Weak price signals: Externalities (carbon, waste) are still insufficiently priced, so green premiums remain a hurdle without targeted incentives (FIEC, 2025).
- Skills scarcity in BIM/LCA/circular competencies is the binding constraint for delivery capacity (FPS Health & Partners, 2023).
- SME finance and evidence gaps: Many smaller firms lack capex, time, and proof-of-payback for digital and circular investments (BBRI & BIM4D, 2024).

## Opportunity levers

Priority levers include outcome-based public procurement (embed BIM/LCA deliverables, reuse targets, and TOTEM thresholds), micro-incentives for SMEs (vouchers for software, training, and coaching), and inter-regional competence frameworks that normalise skills recognition across Belgium (VB Interreg, 2021; FPS Health & Partners, 2023). In parallel, pilot-to-policy pipelines—formal mechanisms that translate Green Deal pilots into codified standards and guidance—can shorten the evidence-to-adoption loop (Vlaamse Overheid, 2022; Confederation of the Construction Industry & OVAM, 2021).

## Macro headwinds

High interest rates, elevated material prices, and input cost volatility continue to pressure margins, particularly in new-build, while renovation remains the growth locus (ING, 2024; FIEC, 2025). Without skills scaling and procurement reform, there is a risk that policy-induced demand outpaces delivery capacity, undermining EPBD-aligned renovation trajectories (FPS Health & Partners, 2023).

# 8. Innovation Opportunities in VET for Sustainable Construction

## Curriculum architecture and pedagogy

- **Digital core (BIM-LCA literacy)**  
Make data literacy and model-based collaboration baseline outcomes across construction VET. Tier learning as: Foundations (2D→3D literacy, IFC basics, reading/interrogating models), Practice (model coordination, quantity take-off, 4D/5D basics), and Impact (LCA with TOTEM, EPD interpretation, design trade-offs) (BBRI & BIM4D, 2024; FCRBE, 2021).
- **Circular competencies**  
Integrate selective deconstruction, reversible detailing, materials passports, reuse logistics, and circular procurement into modules that pair studio-based design with field exercises (audit of existing buildings, component recovery planning) (FCRBE, 2021; Confederation of the Construction Industry & OVAM, 2021).
- **Energy-renovation specialisms**  
Develop stackable micro-credentials for NZEB retrofit, BIPV, heat pumps, building automation, airtightness and insulation protocols, and commissioning—aligned with the quadrupling of renovation rates projected to meet 2050 targets (ING, 2024; FPS Health & Partners, 2023).
- **Interdisciplinary “hybrid” profiles**  
Create pathways for Digital Construction Manager (Circular), Retrofit Coordinator (BIM-LCA), and Site Superintendent (Selective Deconstruction) that blend technical, digital, and environmental outcomes and include work-based learning with mentored reflective practice (FPS Health & Partners, 2023).

## Delivery models and system enablers

- Living labs & pilots: Formalise partnerships with Green Deal Circular Construction and Circular Wallonia so learners can instrument real projects, gather LCA data, and test reuse workflows under supervision (Vlaamse Overheid, 2022; Walloon Government, 2021).
- SME-first incentives: Provide training vouchers, on-the-job coaching, and loaner software seats tied to measurable adoption milestones (VB Interreg, 2021).
- Assessment and recognition: Align competence frameworks across regions; recognise BIM/LCA micro-credentials in public procurement pre-qualification to reinforce labour-market value (FPS Health & Partners, 2023).
- Trainer capacity: Fund train-the-trainer programmes for BIM/LCA/circular topics; co-develop open instructional assets (datasets, sample models, EPD libraries) with Buildwise/BBRI and regional agencies (BBRI & BIM4D, 2024; FCRBE, 2021).

## 9. Conclusions & Recommendations for WP4

Belgium's construction sector is navigating a dual transformation: decarbonisation via large-scale renovation and innovation via digital and circular methods. The growth centre of gravity is shifting decisively from new-build to renovation, propelled by regional obligations and EU policy (FIEC, 2025; ING, 2024). BIM remains voluntary and uneven in SMEs, but TOTEM is consolidating as the national LCA reference, increasingly embedded in procurement and training (BBRI & BIM4D, 2024; FCRBE, 2021). Circular economy strategies in Flanders and Wallonia show durable momentum, institutionalising pilot-to-practice pathways (Confederation of the Construction Industry & OVAM, 2021; Walloon Government, 2021). The binding constraint is skills—particularly digital (BIM/LCA) and circular—which must scale rapidly to meet EPBD-aligned renovation (FPS Health & Partners, 2023).

### Strategic implications for WP4 (curriculum and programme design)

- a. Make digital and environmental literacy foundational: Treat BIM-LCA fluency and EPD/TOTEM literacy as core outcomes across all construction programmes (BBRI & BIM4D, 2024; FCRBE, 2021).
- b. Build modular, stackable pathways for hybrid roles (e.g., Retrofit Coordinator (BIM-LCA)), enabling rapid re-qualification and CPD (FPS Health & Partners, 2023).
- c. Embed living labs: Tie VET delivery to Green Deal and Circular Wallonia pilots, with learning contracts that specify data capture and reflection (Vlaamse Overheid, 2022; Walloon Government, 2021).
- d. Harmonise qualifications inter-regionally: Co-develop shared competence standards and micro-credential taxonomies to reduce fragmentation and aid labour mobility (FPS Health & Partners, 2023).

- e. Use procurement to pull skills: Encourage contracting authorities to reward BIM/LCA competencies (pre-quals, award criteria), creating clear market signals for training uptake (European Commission, 2021; BBRI & BIM4D, 2024).
- f. Support SMEs directly: Pair curricula with vouchers, coaching, and tool access; measure outcomes (e.g., first BIM coordination delivered, first TOTEM study completed) (VB Interreg, 2021).

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Annex 2: State-of-the-Art National Report - Croatia



# REPORT ON THE STATE OF THE ART

## CROATIA

## ● Introduction

The purpose of this report is to provide a state-of-the-art analysis of the energy efficiency and sustainable housing sector in Croatia, focusing on how green and digital transitions are transforming the construction industry and related vocational education and training (VET) systems.

Specifically, this national contribution aims to:

- Identify current practices, policies, and innovations in sustainable housing, with particular emphasis on digitalisation (Housing 4.0) and circular economy principles;
- Map how these innovations intersect with education and training, especially within VET and lifelong learning;
- Highlight labour market trends and skill requirements resulting from the twin transitions;
- Provide evidence-based insights and recommendations that will feed into the curriculum and upskilling framework developed under WP4 of the EXCEL4HOUSING4.0 project.

The analysis follows the EXCEL4HOUSING4.0 desk research methodology and applies the eligibility criteria checklist to ensure that sources are:

- Recent (published in 2018 or later);
- Relevant, addressing sustainability, digitalisation, innovation, VET, and labour market trends;
- Credible, including policy documents, national strategies, EU publications, academic studies, or statistical reports;
- Accessible and suitable for dissemination within the project framework.

At least ten national and European sources have been consulted, complemented by expert insights and data from ongoing public and EU-funded initiatives in Croatia.

The report is structured as follows:

- The general context describes the European and Croatian policy and regulatory framework, market dynamics, and the impact of the twin transitions.
- The thematic analysis explores digitalisation (Housing 4.0), circular economy, and emerging professional profiles.
- The final section provides conclusions and recommendations for vocational education and training, offering input for curriculum design and future capacity-building activities in WP4.

## ● Analysis summary

The Croatian construction sector is undergoing a gradual but decisive transformation shaped by the twin green and digital transitions. As in the rest of the European Union, buildings in Croatia account for around 40 % of total energy use and over 35 % of greenhouse gas emissions, positioning the built environment at the core of national decarbonisation efforts.

In alignment with the European Green Deal, the Renovation Wave, and the recast Energy Performance of Buildings Directive (EPBD, 2024), Croatia has adopted a comprehensive regulatory and strategic framework that targets large-scale renovation, decarbonisation, and resilience of the national building stock. The National Energy and Climate Plan (NECP 2021–2030) and the Long-Term Strategy for the Renovation of Buildings (2020) set ambitious goals to increase the rate of deep renovations, promote

nearly zero-energy buildings (nZEB), and expand the use of renewable energy in housing.

Several complementary programmes support these objectives, including the Programme for Energy Renovation of Public Sector Buildings (2021–2030) and the National Recovery and Resilience Plan (NRRP), which channels significant EU funding into energy-efficient refurbishment, green infrastructure, and sustainable housing. Post-earthquake reconstruction efforts in Zagreb and the Sisak–Moslavina region have further accelerated investment in resilient and energy-efficient construction.

At the same time, Croatia's Circular Economy Strategy (2022–2030) promotes the reuse of construction and demolition waste and supports pilot initiatives for circular construction. Combined with the upcoming BIM implementation roadmap, these policies signal the country's gradual shift towards Housing 4.0 - a construction model that integrates sustainability, digitalisation, and innovation.

Despite progress, several structural challenges persist. Renovation rates remain below the EU average, and the building stock of which over 80 % was built before 1990 requires significant upgrades to meet the 2050 climate targets. The labour market faces acute shortages of skilled workers, particularly technicians and site workers trained in energy renovation, digital tools, and sustainable materials. Although the demand for such profiles is increasing, VET programmes are only partially aligned with emerging needs. Continuous professional training, modular short courses, and micro-credentials are therefore essential to bridge the gap between policy ambition and workforce capacity.

Croatia's innovation landscape in construction is still emerging but shows encouraging signs. Universities, professional chambers, and agencies are piloting BIM-based energy modelling, digital renovation tracking, and circular material management in public projects. These examples demonstrate the potential for linking digital tools with sustainability outcomes, thereby informing future curricula and professional standards.

Overall, Croatia's state-of-the-art reflects a sector in transition: policy frameworks are largely in place, investment is increasing, and awareness of green and digital skills is growing. The remaining barriers - fragmented implementation, limited data integration, and insufficient training infrastructure - underscore the need for stronger coordination between government bodies, educational institutions, and industry.

For the EXCEL4HOUSING4.0 project, Croatia's experience highlights both the potential and the urgency of developing a new generation of construction professionals equipped for digitalised, circular, and energy-efficient building practices.

## ● Indicative outline

### 3.1 Introduction

This section presents the analytical framework and main themes explored in the Croatian state-of-the-art report, following the methodology defined under Task 2.2 of the EXCEL4HOUSING4.0 project.

The analysis aims to describe the current situation, key trends, and innovation patterns within the Croatian construction sector, focusing on energy efficiency, sustainable housing, and Vocational Education and Training (VET).

The research combines desk review, policy mapping, and stakeholder insights, using sources published after 2018 and validated against the project's Eligibility Criteria Checklist. Particular attention has been given to:

- a. The alignment of Croatia's construction and housing sector with EU-level strategies (EPBD, European Green Deal, Renovation Wave, EU Taxonomy);

- b. The intersection of digitalisation and circular economy principles in construction practices;
- c. The evolution of skills, qualifications, and job profiles driven by the twin transitions; and
- d. The identification of opportunities for innovation in VET, in line with future green and digital competence frameworks.

## 3.2 General Context: European Construction Sector & Energy Transition

### 3.2.1 Policy and Regulatory Landscape

The European policy framework for the construction sector is shaped by the European Green Deal (2019), the Renovation Wave Strategy (2020), the EU Taxonomy for Sustainable Finance (2021), and the recast Energy Performance of Buildings Directive (EPBD, 2024). Together, these instruments establish the legislative and financial backbone for achieving a climate-neutral building stock by 2050. They oblige Member States to prepare National Building Renovation Plans, introduce minimum energy performance standards, and ensure large-scale workforce upskilling in green and digital skills.

Croatia's national regulatory and strategic framework is fully aligned with these EU priorities and includes several key instruments:

- National Energy and Climate Plan (NECP 2021–2030) - sets national targets for reducing greenhouse gas emissions by 36-41 % by 2030 and achieving a 32 % share of renewables, with the building sector recognised as a priority area for decarbonisation and energy savings.
- Long-Term Strategy for the Renovation of the National Building Stock (2020) - defines a pathway for deep renovation and the transition to nearly zero-energy buildings (nZEB), with milestones for 2030, 2040, and 2050.
- Programme for Energy Renovation of Public Sector Buildings (2021-2030) -promotes systematic refurbishment of public facilities through grants and technical assistance provided by the Environmental Protection and Energy Efficiency Fund (FZOEU).
- National Recovery and Resilience Plan (NRRP, 2021-2026) - finances large-scale renovation projects, renewable energy integration, and digital transformation of construction processes, with over €200 million allocated to building-related measures.
- Circular Economy Development Strategy for Croatia (2022-2030) - promotes waste prevention, recycling of construction and demolition waste, and the introduction of circular principles in building design and materials management.
- Post-Earthquake Reconstruction Programme - integrates seismic strengthening with energy-efficiency and renewable-energy upgrades, illustrating how resilience and sustainability objectives can converge in practice.

These frameworks collectively demonstrate Croatia's strong political commitment to decarbonising its building stock and improving resource efficiency. However, implementation remains fragmented: local authorities often face administrative and technical barriers, and there is still limited use of digital tools (e.g. BIM, LCA, material passports) in public procurement and construction oversight.

### 3.2.2 Overall Market Dynamics and Key Trends in Construction

The Croatian construction sector contributes around 5 % to national GDP and employs approximately 120,000 people. Over the last decade, the sector has recovered steadily following the 2008 crisis, with growth fuelled by EU-funded renovation programmes and post-earthquake reconstruction.

Key trends shaping the market include:

- Increasing demand for renovation - driven by EU targets, high energy prices, and ageing building stock (over 80 % built before 1990).
- Investment in green and smart buildings - commercial and residential developers are progressively incorporating nZEB standards, energy management systems, and smart controls.
- Rising interest in sustainable materials and circular design - projects exploring recycled aggregates, timber structures, and modular prefabrication are emerging through EU cooperation (e.g. Interreg and Horizon projects).
- Growth of digitalisation - BIM adoption is still in its early stages but expanding in public tenders and engineering firms; universities and chambers of engineers actively promote BIM education.
- Skills shortage - employers face persistent challenges in recruiting skilled workers, particularly retrofit specialists, energy auditors, and technicians trained in digital tools.

Despite positive investment trends, the sector faces barriers related to high material costs, slow permitting, and insufficient digital capacity among SMEs. These factors limit renovation speed and the scalability of green construction methods.

### 3.2.3 Impact of Green and Digital Transitions on the Broader Construction Sector

The green transition is reshaping the sector's value chain by prioritising deep energy renovation, renewable-energy integration, and low-carbon materials. Financial support through the NRRP and FZOEU has accelerated investments in solar photovoltaic systems, heat pumps, and building envelope improvements, while also stimulating innovation in building energy management and performance monitoring.

In parallel, the digital transition, often referred to as Housing 4.0, is introducing BIM, digital twins, and IoT-enabled energy-monitoring systems. These technologies are gradually transforming project management, cost estimation, and facility operation. Universities, REGEA, and the Faculty of Architecture are actively testing BIM workflows for renovation planning, and pilot projects are emerging in public-sector procurement.

Together, these transitions are generating new occupational profiles and altering skill demands. Roles such as BIM coordinators, energy-renovation supervisors, and sustainability consultants are increasingly required. The sector's future competitiveness will depend on how rapidly VET and higher-education systems integrate digital and green competence frameworks (such as ESCO, GreenComp, and DigComp) into training pathways.

#### 3.3.1 Digitalisation in Construction (Housing 4.0)

##### Key Digital Technologies

Digitalisation in the Croatian construction sector is developing progressively, driven by the need to improve productivity, reduce costs, and align with EU requirements for energy-efficient and transparent project delivery. The key digital technologies entering the market include:

- Building Information Modelling (BIM) – increasingly adopted by large engineering and design companies for project coordination, 3D modelling, and cost estimation. Although not yet mandatory in public procurement, several institutions, including the Faculty of Architecture and the Croatian Chamber of Civil Engineers, actively promote its integration through training and pilot projects.
- Digital Twins and Smart Building Systems - still at an early stage, mostly demonstrated in research or pilot renovation projects; these systems allow real-time monitoring of energy performance and predictive maintenance.
- Internet of Things (IoT) and AI applications - being tested in energy management for public buildings and residential retrofits, enabling data-based decision-making and automation of HVAC systems.
- Life-Cycle Assessment (LCA) and Material Passports - emerging tools in sustainability assessments, used by universities and regional energy agencies to evaluate environmental impacts of renovation scenarios.

#### Adoption and Impact in Construction Processes and Building Operation

While large-scale adoption of BIM and digital tools is still limited, early adopters have demonstrated tangible benefits in project coordination, quality control, and cost transparency. BIM integration into renovation projects allows improved material quantification, energy simulation, and scenario comparison. The use of digital tools is also transforming the operational phase of buildings: public facilities renovated through EU-funded programmes are beginning to incorporate monitoring systems for energy consumption and indoor comfort. Over time, these datasets are expected to inform renovation planning and maintenance strategies at the municipal and national levels.

However, barriers remain significant. SMEs, which dominate Croatia's construction sector, often lack the financial and human capacity to invest in software, training, and data management systems. The absence of a national BIM mandate or standardised guidelines limits interoperability and slows diffusion. Moreover, digitalisation is still perceived as an optional efficiency tool rather than a strategic necessity.

#### Current Qualifications and Emerging Job Profiles

New professional roles are gradually emerging, reflecting the growing convergence between construction, IT, and energy management. The most in-demand profiles include:

- BIM Coordinator / BIM Manager - responsible for integrating design data, ensuring model accuracy, and managing collaboration across disciplines.
- Energy and Building Performance Specialist - skilled in data analysis, simulation tools, and optimisation of HVAC and renewable systems.

- Digital Construction Technician - combining knowledge of CAD/BIM tools, surveying technologies, and on-site digital workflows.
- Facility Energy Manager - responsible for monitoring and optimising building performance through IoT and data-driven control.

Croatia's VET and higher education institutions are beginning to address these trends, but the offer of practical, interdisciplinary training remains limited. Upskilling initiatives led by professional associations and regional energy agencies play an important complementary role.

### Relevant Market Trends

The digitalisation of construction in Croatia is closely linked to EU funding requirements and the growing demand for traceable, measurable, and sustainable project outcomes. The public sector is expected to lead adoption through pilot tenders that include BIM deliverables and energy-performance tracking.

As investment in green and smart buildings expands, digital competencies will become essential across all professional levels, from planners and contractors to site managers and maintenance staff.

## 3.3.2 Circular Economy & Sustainable Construction Materials

### Principles and Practices

The circular economy has gained strategic relevance in Croatia through the Circular Economy Development Strategy (2022–2030) and its Action Plan, which identify construction and demolition waste as a priority value chain. The key principles guiding the sector include:

- Design for disassembly and reuse – promoting modular systems and components that can be dismantled and reused;
- Material substitution – replacing high-carbon materials (cement, steel) with bio-based and low-carbon alternatives such as timber, recycled aggregates, and eco-insulation;
- Selective demolition and waste management – increasing recovery rates of construction and demolition waste through better sorting, recycling, and certification of secondary materials;
- Life-Cycle Thinking (LCA) – integrating environmental impact assessment across the entire building life cycle.

Regional and local initiatives are demonstrating how circular design can be embedded in practice. Municipalities, especially Zagreb and Karlovac, have launched awareness campaigns and feasibility studies on circular construction and reuse of demolition materials.

### Sustainable Materials and their Application in Buildings

In Croatia, the use of recycled and sustainable materials is slowly expanding. Notable examples include:

- The use of recycled aggregates in road construction and public infrastructure projects, supported by the Ministry of Economy and Sustainable Development.
- Pilot applications of cross-laminated timber (CLT) and other bio-based materials in public buildings.
- Demonstration of prefabricated façade systems combining insulation and ventilation modules for rapid, low-impact retrofits.
- Projects evaluating the carbon footprint and embodied energy of materials used in renovation.

However, scaling these practices faces challenges: a lack of national standards for secondary materials, limited recycling infrastructure, and conservative procurement practices. Certification systems for circular products are under development but not yet widely adopted.

#### Current Qualifications and Emerging Job Profiles

The shift towards circular construction introduces new competencies, such as:

- Deconstruction Supervisor/Reuse Coordinator - managing selective dismantling and material recovery;
- Circular Design Engineer - integrating material passports and life-cycle analysis into design;
- Sustainable Materials Specialist - evaluating material performance and environmental indicators;
- Circular Procurement Officer - responsible for integrating circularity criteria into public tenders.

These roles are largely new to the Croatian context and currently exist only as pilot profiles within research or EU-funded projects. Incorporating them into national qualification frameworks will be essential for mainstream adoption.

#### Relevant Market Trends

Circular construction in Croatia is primarily driven by EU-funded pilot projects and public tenders that include sustainability criteria. Growing construction costs and material shortages since 2022 have increased interest in reuse, modularity, and local material sourcing.

Nevertheless, market uptake remains slow due to the limited financial incentives, lack of awareness among SMEs, and insufficient VET integration of circular-economy topics. Strengthening collaboration between policymakers, VET institutions, and the private sector will be crucial to bridge this gap.

### 3.4 Cross-Cutting Analysis & Opportunities

The Croatian construction sector is experiencing an accelerating convergence between digital transformation and circular economy practices, forming the basis for a systemic shift toward sustainable, data-driven, and resource-efficient building processes. While these two areas are often addressed separately, their integration represents a key opportunity to unlock higher performance, transparency, and innovation within both policy and practice.

### Interlinkages and Synergies between the Thematic Areas

The intersection of BIM, LCA, and circular construction holds particular potential for Croatia.

- BIM-based design workflows can embed environmental and material data, enabling life-cycle performance assessment and supporting green public procurement.
- LCA integration provides a measurable basis for decision-making, allowing project designers to compare embodied energy, carbon footprint, and material reuse potential.
- Material passports, although still at pilot stage, can link digital design tools with waste management systems, facilitating traceability of materials across the building life cycle.
- The integration of IoT technologies with circular principles can further enable smart monitoring of energy use and material flows, closing the loop between design, operation, and reuse.

Such synergies create opportunities not only for environmental gains but also for new business models, including service-based construction, leasing of materials, and digital platforms for secondary materials exchange. Croatian regional energy agencies, universities, and local governments are well positioned to demonstrate these approaches through pilot initiatives combining digitalisation, energy renovation, and circular economy principles.

### Common Challenges and Barriers

Despite strong policy alignment with EU frameworks, Croatia faces several structural challenges that limit the full potential of digital and circular transition in construction:

- Regulatory fragmentation - Circular construction and digitalisation are addressed in separate strategies, with limited coordination between ministries and regional authorities.
- Insufficient standardisation - Lack of national BIM standards and unclear certification procedures for secondary materials hinder market confidence and interoperability.
- Skills and capacity gaps - The workforce lacks integrated digital and green competencies; VET curricula often treat sustainability and technology as separate domains.
- Financial and technical barriers for SMEs - Smaller companies struggle to access financing for software, training, and new equipment, and often lack qualified personnel to manage digital processes.
- Low awareness and cultural resistance - Construction firms remain risk-averse, prioritising short-term cost savings over long-term innovation benefits.

These challenges underscore the importance of establishing coherent frameworks for competence recognition, cross-sector collaboration, and continuous professional development.

### Innovation Opportunities in VET for Sustainable Construction

The transition toward sustainable and digitalised construction in Croatia presents a strong case for reforming vocational education and training (VET). The following opportunities emerge as particularly relevant:

- g. Integration of digital and environmental modules - embedding BIM, LCA, and circular economy topics within construction, architecture, and technical VET programmes.
- h. Modular micro-credentials - developing short, stackable learning units that provide flexible upskilling pathways for both students and professionals.
- i. Work-based learning and living labs - promoting partnerships between schools, local authorities, and industry, allowing learners to gain hands-on experience in real renovation and digital monitoring projects.
- j. Cross-disciplinary teaching - combining technical, digital, and sustainability skills, with teachers trained to deliver hybrid learning outcomes.
- k. Recognition and standardisation of new profiles - such as BIM Coordinator, Digital Construction Technician, Circular Design Engineer, or Energy Renovation Supervisor, ensuring alignment with the Croatian Qualifications Framework (CROQF).
- l. Public procurement as a driver for skills demand - incorporating BIM and circularity requirements in tenders to stimulate demand for trained professionals and foster collaboration between training providers and employers.

In summary, Croatia's cross-cutting opportunity lies in connecting policy ambitions with practical education reform. Establishing clear competence frameworks, expanding digital and circular training opportunities, and strengthening collaboration between the public and private sectors will be decisive for building a skilled workforce capable of delivering the country's green and digital transition.

## 3.5 Conclusions and Recommendations for WP4

The Croatian state-of-the-art analysis confirms that the country's construction sector is at a critical stage of transformation, where policy alignment, investment momentum, and emerging innovation provide a strong foundation for advancing both the green and digital transitions. However, the full potential of these reforms depends on building a qualified, adaptable, and digitally literate workforce.

### Key Findings Summary

- Policy and regulatory alignment - Croatia has developed a robust policy framework in line with EU objectives (Green Deal, EPBD, Renovation Wave, Circular Economy Strategy), but practical implementation and inter-ministerial coordination require further strengthening.
- Market and investment trends - Renovation and reconstruction activities, supported by the NRRP and FZOEU programmes, are driving demand for sustainable construction solutions. Yet, high material prices, limited recycling infrastructure, and administrative bottlenecks continue to hinder faster progress.
- Digitalisation and innovation - BIM and related technologies are gaining traction through pilot projects, but their diffusion remains limited among SMEs. The absence of national standards and structured training pathways delays large-scale adoption.
- Circular construction - Awareness of circular principles is growing, yet their application in practice is constrained by low market demand, limited technical expertise, and lack of certified secondary materials.
- Skills and labour market gaps - The shortage of skilled workers, particularly those with integrated digital and green competences, is one of the most pressing barriers to achieving renovation and decarbonisation targets.

#### Strategic Insights for Curriculum and Training Programme Design (WP4)

The findings highlight the need for a systemic, future-oriented approach to VET modernisation in Croatia, where digitalisation, sustainability, and innovation are embedded across all training levels. The following strategic directions are proposed for WP4:

- Integrate green and digital literacy as core outcomes  
Introduce BIM, LCA, and circular-economy modules as standard components of construction-related VET curricula, ensuring alignment with EU competence frameworks (ESCO, GreenComp, DigComp).
- Develop modular and stackable training pathways  
Design short, flexible courses and micro-credentials that allow rapid upskilling for professionals involved in renovation, energy management, and sustainable materials.
- Promote living labs and real-world learning environments  
Connect schools, universities, and local governments with ongoing renovation projects, enabling students to gain hands-on experience with BIM tools, digital monitoring, and circular construction techniques.
- Strengthen teacher and trainer capacity  
Establish “train-the-trainer” programmes in cooperation with universities, professional chambers, and energy agencies to ensure consistent delivery of green and digital skills training.
- Enhance cooperation with industry and public authorities  
Foster partnerships between VET institutions, municipalities, and private companies through joint pilot projects and internships, aligning training outcomes with market needs.

- Leverage public procurement as a policy tool  
Encourage contracting authorities to include competence-based criteria (BIM usage, sustainability indicators, LCA reporting) in tenders, thereby creating direct demand for newly trained professionals.

In conclusion, Croatia's construction sector holds substantial potential to become a national showcase for sustainable, circular, and digitalised building practices. The transition now depends less on new policies and more on the human capital able to deliver them. By embedding innovation-oriented learning into vocational education and training, Croatia can build a resilient workforce that supports both national climate goals and the broader European objectives of the EXCEL4HOUSING4.0 initiative.

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## Annexes

### Annex 1 – National Bibliography

The following list includes all national and regional sources consulted during the preparation of the Croatian state-of-the-art analysis. Each document was reviewed and validated according to the Eligibility Criteria Checklist provided in the T2.2 methodology. The selected references represent Croatia's key policy, regulatory, statistical, and research frameworks relevant to energy efficiency, sustainable housing, digitalisation, circular economy, and skills development in the construction sector.

- 1 Long-Term Strategy for the Renovation of the National Building Stock of the Republic of Croatia by 2050 (2020) – Ministry of Physical Planning, Construction and State Assets (MPGI).  
This strategy defines Croatia's roadmap for deep renovation and transition to nearly zero-energy buildings (nZEB), setting milestones for 2030, 2040, and 2050.
- 2 National Energy and Climate Plan (NECP) 2021–2030 (2021) – Ministry of Economy and Sustainable Development (MINGOR).  
Establishes national targets for greenhouse gas reduction and renewable energy use, highlighting the building sector as a priority for energy savings and emissions reduction.
- 3 Programme for Energy Renovation of Public Sector Buildings 2021–2030 (2021) – MPGI and Environmental Protection and Energy Efficiency Fund (FZOEU).  
Provides implementation measures and funding mechanisms for the systematic renovation of public buildings.
- 4 National Recovery and Resilience Plan (NRRP) 2021–2026 (2021) – Government of the Republic of Croatia.

- Channels EU funds into energy-efficient renovation, seismic strengthening, renewable integration, and digitalisation of the construction sector.
- 5 Circular Economy Development Strategy 2022–2030 (2022) – Ministry of Economy and Sustainable Development (MINGOR).  
Introduces principles for waste prevention, reuse, and recycling in construction, defining construction and demolition waste as a priority material stream.
  - 6 Annual Report on Energy Renovation Programmes in Croatia 2022–2023 (2023) – Environmental Protection and Energy Efficiency Fund (FZOEU).  
Summarises results of national and EU-funded renovation programmes, energy savings achieved, and lessons learned.
  - 7 Construction Statistics: Building Permits, Employment, and Investment in the Construction Sector, 2023 Report(2024) – Croatian Bureau of Statistics (CBS).  
Provides the latest data on sector performance, employment, and investment trends.
  - 8 BIM Implementation and Digitalisation in the Croatian Construction Sector – Policy Brief (2023) – Croatian Chamber of Civil Engineers (HKIG).  
Analyses the current level of BIM adoption and the challenges of digital transformation in the Croatian construction industry.
  - 9 Energy Efficiency and Digitalisation in Building Renovation: Pilot Activities and Lessons Learned (2024) – Regional Energy Agency North-West Croatia (REGEA).  
Demonstrates pilot cases linking digitalisation and energy renovation processes in public buildings.
  - 10 Innovative Approaches to Sustainable Housing and Education in Croatia (2023) – Faculty of Architecture, University of Zagreb.  
Presents academic perspectives and practical models for integrating sustainability and innovation into education and housing design.

## Annex 2 – Templates and Methodological Tools Used

The preparation of the Croatian state-of-the-art report followed the methodology developed under Task 2.2 of the EXCEL4HOUSING4.0 project, coordinated by CEEC. The following templates and tools were used to ensure consistency, comparability, and quality across partner contributions.

### 1. Eligibility Criteria Checklist (State-of-the-Art)

All national and EU-level sources were validated against the following criteria:

- Published in or after 2018;
- Relevant to at least one of the project themes: energy efficiency, sustainable housing, VET innovation, digitalisation, or circular economy;
- Issued by a credible and verifiable source such as a government body, research institute, EU institution, or professional association;
- Containing data or analysis directly applicable to Croatia's construction and VET sectors;
- Cited in compliance with APA referencing standards.

## 2. Desk Research and Compilation Process

The desk research phase included:

- Systematic identification of national and EU-level sources relevant to Croatia;
- Review of policy frameworks, statistical data, and pilot projects;
- Extraction of key findings into a structured list summarising main insights, relevance, and implications for WP4;
- Verification and cross-referencing of data between official publications and recent project reports;
- Synthesis of findings into thematic sections (digitalisation, circular economy, market trends, and skills).

## 3. Tools and Templates Applied

The following tools and templates were used during the process:

- Eligibility Criteria Checklist – T2.2 (State-of-the-Art)
- Desk Research List Compilation Template (Excel)
- State-of-the-Art National Compilation Template (Word)
- EXCEL4HOUSING4.0 Task 2.2 Methodology Document (CEEC, 2025)

## 4. Validation and Quality Assurance

The draft report was internally reviewed by REGEA and the Faculty of Architecture, University of Zagreb, before submission to the WP2 Lead. All findings were cross-checked for relevance, accuracy, and consistency with the European framework and the project's objectives.

### End of the National Contribution – Croatia

This national report has been prepared jointly by the North-West Croatia Regional Energy and Climate Agency (REGEA) and the Faculty of Architecture, University of Zagreb, as part of Task 2.2 – State-of-the-Art Analysis and Collection of Best Practices under the EXCEL4HOUSING4.0 project.

The contribution reflects Croatia's current status, challenges, and opportunities in advancing energy efficiency, sustainable housing, digitalisation, and circular construction within the national VET and labour market context. It provides evidence-based insights that will directly inform the development of curricula, training modules, and capacity-building actions under Work Package 4 (WP4).

All information has been compiled in accordance with the T2.2 methodological guidelines and validated against the project's eligibility and quality assurance criteria.

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## Annex 3: State-of-the-Art National Report - Finland



# REPORT ON THE STATE OF THE ART

## FINLAND

## ● Introduction

This report is mapping the Finland's construction sector's policy drivers, market dynamics, and technological trends, and examines their implications for skills, jobs, and vocational training. The purpose is to understand how the green and digital transitions can happen in practice. Using structured desk research the analysis combined with detailed case studies of Swedish and Finnish smart and sustainable cities, highlighting its leadership in digitalisation and circular construction practices. The findings were then translated into concrete opportunities for VET, with a focus on curriculum design, micro-credentials, and living-lab approaches. In doing so, the analysis bridges European regulatory and market developments with national best practices and identifies how vocational education and training can equip the workforce with the competence needed to deliver on the climate and digital ambitions of the sector.

## ● Analysis summary

There are several initiatives both in VET-providers and cities to work in a cross-disciplinary way to address the challenges and barriers of sustainable, energy efficient housing. Cities can take leadership in this transition to overcome the barriers and challenges. The report gives practical examples how different cities have done this.

## ● Indicative outline

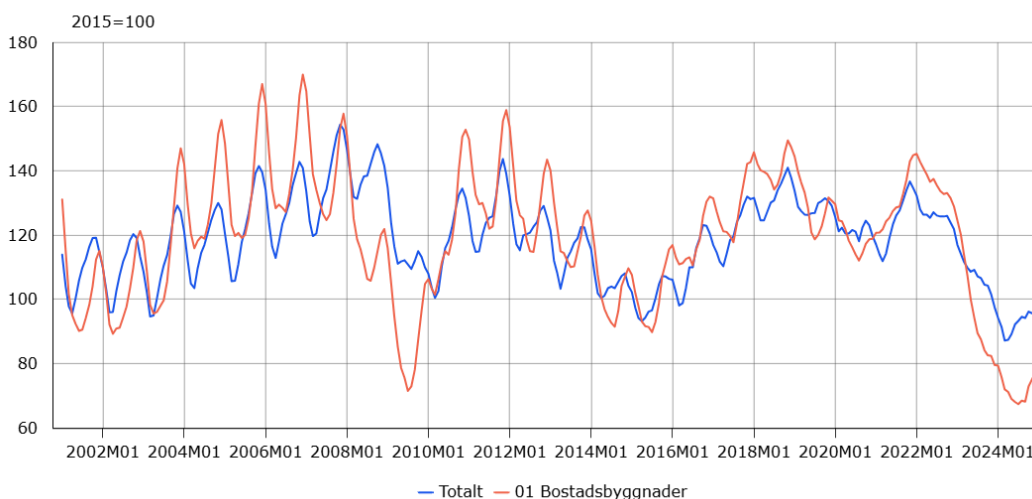
### Introduction

*This analysis of the Start-of-the-Art aims at providing an understanding of the vocational and professional situation regarding qualifications in circular economy, digitalisation and sustainability, with a forward-looking focus on innovation and market trends. The report is based on desk research, with analysis of legislation and research reports on sustainability issues and development as well as practical examples from smart and sustainable cities in Sweden and Finland which have introduced innovative processes for enhancing sustainable housing in the three thematic areas.*

### General Context: Finnish Construction Sector & Energy Transition

- Based on the EU directive on energy efficiency (EU/2023/1791), Finland is preparing an update of current regulations (and requirements regarding calculations of energy efficiency in both new buildings and in renovations (Ministry of the Environment n.d.).
- The new Building Act (751/2023) includes requirements for competences for designers and site managers, digitalization of administration of building permits (Lag om datasystemet för den byggda miljön 431/2023), as well as calculation of carbon footprint for all larger new buildings.
- The overall market dynamics are weak, with a 3 year period of decline in construction and housing new builds (Rakennusteollisuus 2025). See also graphic below.

Volymindex för nybyggnad (2015=100) 2001M01-2024M12  
Indextal



Källa: Statistikcentralen, byggnads- och bostadsproduktion

- The NATSPEC report 2025 states HE:s currently provide BIM education for students, in different disciplines.
- Construction in wood has long been on the agenda in Finland, but in recent years the focus has shifted towards high rise buildings and CLT as means of promoting a climate-friendly construction method. Despite promotion it has not reached any large impact. Partly due to the recession in the construction markets. Education has been strengthened and there is today a better understanding of problems and solutions (Heino 2011).

### Thematic Analysis of State-of-the-Art

#### Digitalisation in Construction (Housing 4.0)

- Buildings information modeling (**BIM**) is adapted by most large developers, contractors as well as architect and engineering offices (NATSPEC 2025). Building Smart Finland (BsF) is currently rewriting the existing BIM recommendations (YTV2012) from 2012 aiming at standardizing use cases (BuildingSmartFinland n.d.), in cooperation with corporations and BuildingSmart International. BuildingSmart Finland (BsF) is preparing a pre-study regarding a qualification setup for BIM competences in relation to international certification models for practitioners (BuildingSmart Finland, n.d.).
- **AI for energy & operations** – Finnish and Swedish cities have been actively supporting and testing the use of AI to optimise energy use, reduce costs and increase indoor air quality. One of the first public building owners to introduce this technology was SISAB in Stockholm as it in 2020 introduced SOLIDA. SISAB is fully owned by the City of Stockholm and owns and operates all public schools and daycares in Stockholm. SISAB partnered with a large company (Scneider Electric) and small companies such as Init and Myrspoven. SOLIDA uses real-time data and predictive algorithms to continuously fine-tune indoor climate and energy use. Thousands of temperature and CO<sub>2</sub>-sensors feed into the system, enabling 24/7 intelligent control. From SISAB's control tower, experts now monitor more than 600 schools, manage 200 alarms daily and support

maintenance teams citywide. The problem with this type of system is that it is a vendor lock-in, if the building owner wants to change the building automation system to another vendor, the data will be lost. Another obstacle is that all building automation systems must be upgraded first, before AI can be introduced. To address these problems the City of Jakobstad used innovative new technology which avoided both the lock-in and the upgrading problematic. The company Nobody Engineering installed its IOT-robots in existing buildings with automation systems from different manufacturers and eras (from late 1980' to 2020's). The IOT-robot collects the data 24/7 and it is stored into an independent data layer. All data is owned by the city and it can decide which companies can provide AI-based added-value services for the city. In Jakobstad's case the company Lassila & Tikanoja provided the same type of service as Inet and Myrspöven in Stockholm. The large differences between the SISAB and Jakobstad cases were:

- the deployment time in Jakobstad was very short
  - the investment costs are very much lower
  - the payback time was very short
  - the city owns all data and can very easily change the service provider without any loss of historical data
- **Digital twins from district to building scale** – Metropolia University of Applied Sciences in Helsinki has launched a new multi-year cooperation project called Smart Buildings in Smart Communities, which aims to develop and expand the expertise in smart electricity use and building technology from properties to the block level – combining the opportunities of artificial intelligence, digitalisation and collaborative learning. The project continues the results of the Real Estate Information and IoT Solutions Management project carried out in 2020–2024, and it receives its funding from STEK ry. The goal is to develop Myllypuro's Smart Campus into an even more versatile RDI and learning environment and to develop new solutions for building interfaces, energy efficiency and data utilisation together with companies and research networks. The Smart Building Gold certified Myllypuro campus is being developed into a generic RDI and learning platform for data-based smart solutions in buildings. The campus has already proven its potential as a learning environment, and in ongoing projects and future projects, its solutions will be applied in residential, hotel and hospital environments. The project focuses on the development of AI-based solutions for electrical and building technology, digital twins of buildings and data visualization, technology transfer through education and learning solutions, and cooperation with companies, educational institutions and international networks.

### Circular Economy & Sustainable Construction Materials

- The built environment in Finland is of recent date, with only about 4 % of the structures being built before 1920, and on average approx. 40 % is built about 50 years ago (Finlands officiella statistik 2024). According to Huuhka & Lahdensivu (2014) about 80 % of all demolished buildings were less than 60 years old.

- Since 1994 the legislation for construction and building includes a requirement for sustainability. Building activities should create: “preconditions for a favourable living environment and promote ecologically, economically, socially and culturally sustainable development” (Lag om ändring av byggnadslagen 1994).
- In 2022 the Ministry of the Environment initiated a study about the promotion of circular economy and lifespans of buildings, and with the aim of systematizing life cycle qualities in the construction processes (Hakaste, H., Häkkinen, T., Lahdensivu, J. and Saarimaa, S. 2024). There is no legislative outcome yet from this process.
- A recent process innovation in Finland is the concept of *project alliances* (Allianssimalli) (Hietajärvi 2017; RT 103239 and RT 103199, 2020). Instead of a process of step-by-step where each phase is limited and all phases are based on bidding and competition, the projects are initiated as integrative endeavors, where time is spent on searching for optimal solutions and streamlining design and construction (Saarinen 2020). This allows more space for evaluation of solutions and creates a holistic approach, instead of each party optimizing their efforts towards the goals of the client. It is said to promote holistic problem solving and innovation (Hietajärvi 2017; Ahlbäck 2020). This model is used for large projects, where smooth use of digital cooperation is important and all parties are involved in the setting of goals and targets, among others also sustainability (Ibid.).
- The cities of Stockholm and Vaasa has initiated processes, methodologies to steer and support construction companies towards constructing low-carbon buildings. In both cities the starting point is to calculate the carbon footprint of a standard building and then find possibilities to lower the footprint. Interestingly the calculation of a plus-energy multi-storey building showed a higher carbon footprint than a standard multi-storey building. The reason was that a lot of PV:s were installed both on the roof and walls of the building. All these PV:s were produced with coal-based energy plants abroad. In Vaasa the tool one-click LCA was defined as the method with which the building carbon footprint would be evaluated. The city set a goal that all new buildings in a green field area of ravilaakso would need to have 40% lower carbon footprint compared to standard buildings in Finland. For this purpose, construction companies received the possibility to participate in a series of lectures both on the use of the calculation tool, but also different ways of reducing the carbon footprint of a new building.
- In the project GrowSmarter (see best practice) a refurbished 13 story building was compared to a similar new building and the calculations showed that the refurbished and modernised had a 70% lower carbon footprint than an equal new building.

- VET education has curricula from government+ GreenComp 2022
  - The Rector's Conference of Finnish Universities of Applied Sciences (Arene ry) together with the organisation for VET providers (AMKE ry) have initiated a process to become carbon neutral by 2030 (Arene ry 2021).
- **Cross-Cutting Analysis & Opportunities**
    - There are many initiatives in Swedish and Finnish cities to steer and support the construction of more sustainable and energy-efficient buildings. These initiatives include the implementation of IOT-platforms and AI to reduce the energy use, costs and improve the indoor climate.
    - The initiative of Jakobstad in Finland to collect and store real-time data from its buildings into an independent data layer and share this data with a separate agreement to the University of Vaasa gives researchers an opportunity to get access to big data without a data collection cost.
    - The practical cases and initiatives in Stockholm, Vaasa and Jakobstad shows interlinkages and synergies between the three thematic areas.
    - Many of the challenges and barriers first-mover cities such as Stockholm have faced are common across diverse European regions (e.g., policy, financial, skills-related).
    - There are a lot of innovation opportunities if cities open their buildings data for universities and start-up companies, where the barrier is: a) access to real-time data and b) high costs for installing own tools for data collection. In Jakobstad start-up companies as well as established companies got limited access to data from the independent data layer for the purpose of developing and testing new services to reduce both costs and energy use of existing buildings. '
    - BIM is widely taught in higher education, but current AI development seems to indicate fast changes in work practices and need for reskilling both in the education of youth and by means of continuing education for those already with working life experiences.
  - **Conclusions and Recommendations for WP4**
    - Cities aiming for carbon neutrality can have an important role in supporting the construction of sustainable buildings:
      - by collecting real-time data from its buildings into an independent data layer, where it can be shared with agreement to external actors (schools, research institutes, public organizations, start-ups etc.)
      - by developing methodologies to calculate the carbon footprint of buildings
      - by providing training for construction companies regarding sustainable technologies, data collection, tools for calculating carbon footprints etc.

- by testing and demonstrating both refurbished and new buildings were innovative solutions have been implemented to reduce the energy use and climate impact (see best practice GrowSmarter)
- Based on an assumption that AI will transform ways of working, it seems appropriate to rethink teaching and learning. The crucial changes seem to be an increasing need to monitor results, AI-tool fluency and management in a multi-disciplinary context and less work in routine tasks and detailing. The focus of skills development has to shift from the current university education complemented with initial on-the-job trainee positions for longer periods, to creating a preparedness for managing and understanding processes, risks and interrelated multi-disciplinary production.
- A *generative design studio* could be an adequate learning environment for architect and engineering design students, as a training context for senior students providing training to master projects. This can be seen as a rearrangement of the Finnish example of Best Practice in digitalization.
- For site management one can think of a similar generative studio, but with a *game-like setting*, providing the training model illustrating the progress of a construction process, as a simulation.
- In both instances it is possible to *integrate sustainability issues*, and *vocational training* alongside that of architect and engineering students. This can be seen in relation to the Finnish Best Practice *Teknikhuset* as a hands-on environment, allowing for both simulations and adaption and refitting according to new emerging technology.

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## Annex 4: State-of-the-Art National Report - Germany



# REPORT ON THE STATE OF THE ART

Germany

## ● Introduction

This report provides a comprehensive overview of the state of the art in Germany's construction sector, focusing on the energy transition, digitalisation, circular economy, and sustainable construction materials. The methodology combines desk research, analysis of policy documents, market reports, and academic literature to synthesize current trends, challenges, and opportunities relevant to vocational education and training (VET) and the EXCEL4HOUSING4.0 project.

## ● Analysis summary

Within the broader European policy framework, the construction sector is influenced by a range of initiatives aimed at achieving climate neutrality and energy efficiency. The European Green Deal sets the overarching goal of making Europe the first climate-neutral continent by 2050, with the Renovation Wave strategy specifically targeting the improvement of energy performance in buildings across member states. The EU Taxonomy further encourages sustainable investment by defining criteria for environmentally sustainable economic activities. These measures are complemented by the revised Energy Performance of Buildings Directive (EPBD, 2024), which establishes ambitious standards for zero-emission buildings and the gradual phase-out of fossil fuels.

In Germany, the regulatory landscape is shaped by the Buildings Energy Act (GEG), which consolidates energy efficiency and renewable energy requirements for new and existing buildings. Recent amendments ensure alignment with EU targets, reinforcing the commitment to decarbonisation in the built environment. The National Building Renovation Plan (NBRP) outlines detailed milestones for 2030, 2040, and 2050, including policy measures and investment needs to support the transition to a zero-emission building stock. These frameworks collectively drive innovation, investment, and adaptation within the German construction sector, positioning it at the forefront of sustainable development in Europe.

## ● Indicative outline

### General Context: European Construction Sector & Energy Transition

#### *Policy and Regulatory Landscape*

- Germany is implementing the revised Energy Performance of Buildings Directive (EPBD, 2024), which mandates zero-emission standards for new buildings by 2030 and a phase-out of fossil fuels by 2040. The national Buildings Energy Act (GEG) integrates energy efficiency and renewable energy requirements, with recent amendments to align with EU targets.
- The European Green Deal, Renovation Wave, and EU Taxonomy are driving investment and regulatory changes, with a focus on decarbonising the building stock and promoting sustainable finance.
- Germany's National Building Renovation Plan (NBRP) sets detailed targets for 2030, 2040, and 2050, including policies, measures, and investment needs to achieve a zero-emission building stock.

### *Overall Market Dynamics and Key Trends in Construction*

- The German construction market was valued at USD 267.7 billion in 2024 and is projected to reach USD 458.3 billion by 2034, with a CAGR of 5.6%. Growth is driven by public infrastructure investment, housing demand, and sustainability initiatives.
- Renovation and retrofitting dominate activity, as owners upgrade buildings to meet EU energy rules. Modular construction and digitalisation are gaining traction as responses to labor shortages and cost pressures
- The sector is increasingly focused on energy-efficient buildings, eco-friendly materials, and innovative construction techniques, with strong private sector involvement.

### *Impact of Green and Digital Transitions on the Broader Construction Sector*

- The green transition is accelerating demand for energy-efficient retrofits, sustainable materials, and circular practices. The digital transition is reshaping design, planning, and construction through technologies like BIM, AI, and IoT.
- Both transitions are creating new job profiles and upskilling needs, while also presenting challenges related to regulatory complexity, investment, and workforce adaptation.

## Thematic Analysis of State-of-the-Art

### *Digitalisation in Construction (Housing 4.0)*

#### – **Key Digital Technologies:**

- Building Information Modelling (BIM) is now standard in public procurement and widely adopted for planning, coordination, and lifecycle management.
- Digital Twins, AI, and IoT are increasingly used for real-time monitoring, predictive maintenance, and energy management.

#### – **Adoption and Impact:**

- Digitalisation improves productivity, reduces errors, and enables new business models. However, barriers include high upfront costs, lack of standardisation, and skills shortages.
- The German government has launched a Road Map for Digital Design and Construction to establish BIM as the nationwide standard.

#### – **Current Qualifications and Emerging Job Profiles:**

- Demand is rising for BIM managers, digital construction coordinators, data analysts, and specialists in AI and IoT for buildings.
- VET curricula are being updated to include digital competencies, but gaps remain in advanced digital skills.

#### – **Market Trends:**

- Digital transformation is a key driver of competitiveness and sustainability in the sector. Cloud-based BIM, digital twins, and AI are expected to become mainstream by 2030.
- The EPBD<sup>1</sup> (2024 recast) requires national renovation plans, minimum energy-performance standards, and large-scale skills measures; together with the Renovation Wave and EU Taxonomy, this creates a coherent regulatory-financial architecture that cascades into national and regional programmes.
- Germany's National Building Renovation Plan (NBRP) outlines detailed targets for 2030, 2040, and 2050, including policy measures and investment needs to support the transition to a zero-emission building stock.
- Renovation rates must roughly quadruple to meet EU targets, implying sustained demand for energy-efficiency services and delivery capacity.
- The sector employs over 2.6 million workers and mobilised approximately €400 billion in 2024, with renovation and infrastructure segments expanding due to policy incentives and high energy prices.
- Net job effects to 2030 are modestly positive, yet highly uneven across occupations. Demand grows for hybrid roles such as Retrofit Coordinators and BIM Managers, while traditional roles require digital and circular upskilling.
- The binding constraint is workforce capability rather than headline job counts.
- BIM adoption is increasingly standard in public procurement, but SME uptake is slowed by cost, standards, and ROI uncertainties.
- The shift from document-centric to data-centric delivery elevates demand for BIM/LCA fluency across roles, requiring modular curricula and stackable micro-credentials.
- Germany's circular construction market is thickening through public procurement pilots, regional premiums, and knowledge networks, but frictions persist: fit-for-purpose standards for reclaimed elements, liability and warranty frameworks, and logistics for reverse flows.
- Circularity accelerates demand for reuse logisticians, materials auditors, circular procurement managers, and deconstruction planners.

### *Circular Economy & Sustainable Construction Materials*

#### **– Principles and Practices:**

- Germany's National Circular Economy Strategy (NCES) promotes reuse, recycling, and waste minimisation across the construction value chain.

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<sup>1</sup> **Energy Performance of Buildings Directive.** In German language: **Richtlinie über die Gesamtenergieeffizienz von Gebäuden.**

- The sector recycles about 90% of construction and demolition waste, but much is downcycled rather than reused in high-value applications.
- Modular construction, material passports, and digital tools (e.g., BIM) support circularity.
- **Sustainable Materials:**
  - Increasing use of recycled concrete, wood, and bio-based materials. Urban mining and cradle-to-cradle approaches are gaining ground.
- **Current Qualifications and Emerging Job Profiles:**
  - New roles include circular construction managers, material flow analysts, and sustainability consultants.
  - VET and higher education are integrating circular economy concepts, but further curriculum development is needed.
- **Market Trends:**
  - Regulatory and market pressures are driving adoption of circular practices. Digitalisation is enabling better tracking and reuse of materials.

## Cross-Cutting Analysis & Opportunities

- **Interlinkages and Synergies:**
  - Digitalisation and circular economy are mutually reinforcing: digital tools enable material tracking, lifecycle analysis, and efficient resource use.
  - Both areas require upskilling and new qualifications, especially in digital and green skills.
- **Common Challenges and Barriers:**
  - Priority levers include outcome-oriented public procurement, micro-incentives for SMEs, and interregional competence frameworks that standardize the recognition of qualifications.
  - Skills shortages, especially in digital and green competencies.
  - Regulatory complexity and fragmented standards.
  - High upfront investment costs and slow adoption of innovation, especially among SMEs.
  - Need for better collaboration between VET providers, industry, and policymakers.
- **Innovation Opportunities in VET for Sustainable Construction:**
  - Living labs and pilot projects that inform policy can shorten the path from evidence to adoption and support curriculum innovation.
  - Expansion of modular, digital, and green skills in VET curricula.
  - Greater use of digital platforms for training and upskilling.
  - Partnerships between VET, industry, and research to pilot new approaches (e.g., InnoVET, BuildSkills Academy).

## Conclusions and Recommendations for WP4

### *Key Findings Summary*

- Germany's construction sector is at the forefront of the green and digital transitions, but faces significant challenges in workforce skills, regulatory adaptation, and innovation uptake.
- Digitalisation (BIM, digital twins, AI) and circular economy practices are reshaping job profiles and training needs.
- There is a strong policy and investment push for sustainable, energy-efficient, and circular construction, but implementation gaps remain, especially in VET.

### *Strategic Insights for Curriculum and Training Programme Design*

- Update VET curricula to integrate digital and green skills, including BIM, AI, IoT, and circular economy principles.
- Foster partnerships between VET providers, industry, and research to ensure curricula reflect current and future skills needs.
- Promote modular and flexible training formats, including online and blended learning.
- Support upskilling and reskilling for existing workers, with a focus on SMEs and older employees.
- Encourage innovation in teaching methods, including the use of digital platforms and real-world project-based learning.

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## Annex 5: State-of-the-Art National Report - Greece



# REPORT ON THE STATE OF THE ART

## Greece

## ● Introduction

This report delivers a state-of-the-art analysis of Greece's construction sector with a focus on energy-efficient housing, sustainable construction, digitalization (Housing 4.0), and the circular economy, and examines the resulting qualification needs, evolving skill requirements, and emerging job profiles.

Methodologically, the study follows the EXCEL4HOUSING4.0 desk-research guidelines, applying an eligibility checklist to ensure that sources are recent (2018+), relevant (sustainability, digitalization, VET innovation, labor market trends), credible (peer-reviewed work, national statistics, authoritative policy documents), and accessible for dissemination.

The report is structured as follows:

- The general context describes the European and Croatian policy and regulatory framework, market dynamics, and the impact of the twin transitions.
- The thematic analysis explores digitalization (Housing 4.0), circular economy, and emerging professional profiles.
- The final section provides conclusions and recommendations for vocational education and training, offering input for curriculum design and future capacity-building activities in WP4.

## ● Analysis summary

The Greek construction sector is rapidly evolving due to digitalization and the green transition. Energy efficiency, sustainable buildings, and circular economy principles are now key policies and market priorities. Public programs like Electra, Exoikonomo, and EU-funded initiatives are accelerating energy-efficient renovations and digital adoption, presenting both opportunities and workforce skills challenges.

Construction sector contributed approximately 2.6% of Greece's GDP in 2024, supported by over €14 billion in public and private investment. Employment in construction reached 210,000 workers in 2024, reflecting an 8.8% increase from 2023, although medium-skilled labor shortages remain critical (IOBE, 2025).

National strategies focus on the reutilization and recycling of waste generated from construction and demolition. Employment opportunities in circular construction, energy-efficiency retrofitting, and life cycle assessment (LCA) analysis are anticipated to grow. Occupations that require medium qualifications are especially impacted by the transitions towards digital technologies and green practices. There is an immediate demand for hands-on, modular vocational education and training (VET) programs that address BIM, circular design, energy efficiency, and the operation of smart buildings. Small and medium-sized enterprises (SMEs) and smaller construction companies need support to access training and implement innovative methods.

Greece is aligned with European Union initiatives such as the Renovation Wave, the Energy Performance of Buildings Directive (EPBD), and the EU Taxonomy, which incorporate sustainability, digitalization, and energy efficiency into regulatory standards.

National initiatives such as National Resilience and Recovery Plan aim to enhance building renovations, the integration of renewable energy, and the development of energy-efficient public infrastructure.

## ● Indicative outline

### Introduction

This task aims to provide an overview of current practices and innovations in sustainable, digitalization and energy-efficient construction in Greece, focusing on their integration into training, qualifications, and innovation frameworks. Specifically, the report seeks to:

1. Explore sustainable practices and innovations in the construction sector, with emphasis on digitalization (Housing 4.0) and circular economy approaches.
2. Analyze the relationship between these innovations and education and training, especially in vocational education and training (VET) and lifelong learning.
3. Identify emerging market and policy trends that are influencing the need for new skills and qualifications.
4. Emphasize how government-funded initiatives foster connections between sustainability, digital transformation, and workforce development.

The analysis was conducted through desk research, combining literature review, case study analysis, and comparative framework review to capture the current landscape and relevant needs of construction professionals, policymakers, VET institutions, and end-users.

### General Context: European Construction Sector & Energy Transition

The European construction sector is entering a period of profound structural transformation between 2025 and 2026, driven by the twin green and digital transitions. Following a moderate recovery from previous years' slowdown, the projected annual growth of 2.1% is underpinned by public investment focused on energy-efficient renovation, affordable housing, and resilient infrastructure.

Energy efficiency is emerging as a strategic priority, with a strong emphasis on retrofitting the existing building stock to reduce consumption and combat energy poverty, which continues to affect millions of vulnerable households. These interventions not only enhance the thermal performance of buildings but also strengthen social cohesion and urban resilience.

However, the green transition faces structural barriers, most notably the shortage of skilled labor. Despite financial momentum from European funds and national policies, the sector struggles to attract and retain technical professionals specialized in energy efficiency, industrialized construction, and digitalization. This shortage threatens to delay the implementation of key projects and highlights the urgent need for vocational training programs and improved working conditions. In parallel, technological innovation, such

as modular construction, low-impact materials, and digital solutions, is emerging as a critical lever to boost productivity and meet the EU's climate targets.

Employment in Construction in Greece reached 210 thousand workers in 2024, up by 8.8% compared to 2023 (+17 thousand workers), covering part of the sector's increased labor needs. In the Architecture and Engineering activities, employment reached 90,000 persons in 2024, showing a significant increase from 2020 (+21%). According to the ELSTAT Labor Force Survey, the majority of workers in Construction are employed in specialized construction activities (106,000 persons in 2024).

### **Policy and Regulatory Landscape (e.g., EPBD, European Green Deal, Renovation Wave, EU Taxonomy relevant to construction)**

The Renovation Wave Strategy, launched in October 2020, outlines a comprehensive set of measures designed to more than double the annual rate of energy renovations across the European Union by 2030. This initiative is a central pillar of the EU's broader efforts to achieve climate neutrality and promote a just and sustainable energy transition.

A key component of the strategy is the revision of the Energy Performance of Buildings Directive (EPBD), which represents a fundamental step in updating the existing regulatory framework. The revised directive seeks to align building policies with the EU's higher climate ambitions and increasing social needs, while also providing Member States with the flexibility required to address the diverse characteristics of national building stocks across Europe. Through these measures, the Renovation Wave aims not only to enhance energy efficiency and reduce greenhouse gas emissions, but also to tackle energy poverty, improve indoor comfort, and stimulate economic activity in the construction and renovation sectors (CRES, 2023). In addition, Level(s) is a voluntary reporting framework to improve the sustainability of buildings. It provides a common EU approach to assess environmental performance in the built environment.

Greece's national regulatory and strategic framework is fully aligned with these EU priorities and includes several key instruments:

Greece's national climate law: adopted in May 2022, sets a climate neutrality target for 2050, as well as intermediate targets of a 55 % reduction of net GHG emissions by 2030 and an 80 % reduction by 2040. It introduces sectoral objectives and measures, and requires the government committee on climate neutrality to prepare sectoral carbon budgets. The law requires the adoption of a national climate adaptation strategy, regional adaptation plans, and municipal emissions reduction plans.

National Energy and Climate Plan (NECP 2021–2030) : Greece's NECP sets economy-wide 2030 targets (GHG reductions, renewables, energy efficiency) and treats the buildings sector as a priority for decarbonization and savings. The NECP is the national roadmap that coordinates how Greece contributes to EU-level climate & energy targets and investments toward renewables, energy efficiency and grid resilience.

Long-Term Renovation Strategy for the National Building Stock (2021): Greece's long-term renovation strategy (Ministerial decision published 2021) defines a pathway to transform the national building stock toward nZEB / near-zero emissions by 2050, setting intermediate milestones (2030/2040/2050) and mobilising public and private finance for deep and staged renovations.

Programmes for energy renovation of public buildings (ELECTRA 2021–2030) — Greece runs targeted public-building renovation programs (e.g., the ELECTRA program and specific NRRP investments) that combine grants, technical assistance and eligibility rules to upgrade public facilities to higher energy classes and to reduce energy consumption in the public estate.

National Recovery & Resilience Plan — “Greece 2.0” (NRRP, 2021–2026 and REPowerEU update): Greece's NRRP allocates large funding to building upgrades, public building renovations, energy infrastructure and licensing reforms for renewables. TGreece 2.0 includes 105 investments and 75 reforms, structured around five pillars:

- Green Transition
- Digital Transformation
- Employment-Skills-Social Cohesion
- Private Investments and Transformation of the Economy
- REPowerEU

Circular Economy & Waste / Construction & Demolition Waste policy (national strategy / action plans 2020–2030): Greece's national circular economy action plan and related legislative instruments (national waste management plans and sectoral measures) include objectives for construction and demolition waste (prevention, source separation, recycling, re-use) and encourage circular design and materials management in building works. This links construction practices directly to EU circularity objectives.

## **Overall Market Dynamics and Key Trends in Construction (e.g., investment, growth drivers, consumer demand for sustainable housing)**

The Greek construction sector has entered a period of steady recovery and structural transformation, following a decade of economic recession and the subsequent rebound supported by EU funds. In 2024, construction contributed approximately 2.6% of Greece's GDP, with over €14 billion in total investment across public and private projects (ELSTAT, 2024).

The number of enterprises in the broad construction sector in Greece stood at 120,734 in 2020, representing a decrease of 32.3% since 2010. This was due to declines in the number of enterprises in the manufacturing ( 51.7%), the narrow construction ( 34.8%) and the architectural and engineering activities ( 29.8%) sub-sectors, offsetting an increase in the real estate activities sub-sector (+42.4%), over the 2010 2020 period.

In parallel, the volume index of production in the broad construction sector witnessed a decline of 36.6% over the 2015-2020 period. This was due to declines in the volume index of construction of buildings (

37.8%) and the construction of civil engineering (35.9%) over the same period. Similarly, the total turnover of the broad construction sector reached EUR 17.1 billion in 2018, representing a 25.3% decline compared to 2010. Furthermore, in 2020 it increased to EUR 17.8 billion, representing a 4.2% increment from 2018, but a 22.2% decline from 2010 (ECO, 2020). Moreover, according to ELSTAT, in 2025 the Production Index in Construction (IPC) in the 2nd quarter 2025 recorded an increase of 7.2% compared with the 2nd quarter 2024. The IPC in 2nd quarter 2024 increased by 15.5% compared with the corresponding index in the 2nd quarter 2023. The Production Index in Construction (IPC) in the 2nd quarter 2025 recorded an increase of 44.0% compared with the 1st quarter 2025. In the 2nd quarter 2024, the IPC increased by 29.3% compared with the corresponding index in the 1st quarter 2024. The seasonally adjusted Production Index in Construction in the 2nd quarter of 2025 recorded an increase of 9.8% compared with the 1st quarter 2025.

In terms of employment, there were 271,497 persons employed in the broad construction sector in 2020, representing a 28.2% decrease since 2010. This was due to declines in the manufacturing (42.4%), the narrow construction (33.8%) and the architectural and engineering activities (15.3%) sub-sectors, offsetting an increase in the real estate activities sub-sector (+73.5%), over the 2010-2020 period.

The number of households in Greece in 2020 reached 4.4 million units, representing a 0.8% growth from 2010 levels.

Additionally, the continuously declining mortgage interest rates since 2011 (reaching 2.0% in 2020), coupled with the increasing urbanization rate and rising household income, contributed to a strong housing demand, which drove the housing prices up in 2020. According to Bank of Greece, house prices in Greece's urban areas rose by 3.4% during the year to the third quarter of 2020. However, this is comparatively lower than the previous year (8.5%). The annual slowdown in housing prices can be attributed to the imposition of strict lockdown measures across the country in order to contain the COVID-19 pandemic. Foreign demand, which had been the driver of the Greek housing market. As a result, the property market accounted for a 25.3% share of total foreign direct investments (FDI) in Greece, down from 32.3% in the previous year. In order to uplift the housing market and the construction sector, the government introduced the Reduction of the Single Property Tax (ENFIA) measure to help reduce the tax burden.<sup>2</sup>

Greece's National Recovery and Resilience Plan (NRRP), aiming to deploy funds amounting to EUR 30.5 billion in grants and loans, includes urban regeneration, investment projects and renovation plans for upgrading the energy efficiency of residential buildings. The plan includes providing support for the green transition through investments of EUR 1.3 billion in the energy-efficient renovation of more than 100,000 residences, including for low-income households. The country will invest EUR 160.0 million for the development of 5G networks, EUR 1.3 billion in the digital transformation of the public sector and another EUR 375.0 million for the digitalization of businesses, promoting the integration of digital technologies in SMEs. Furthermore, as per the plan, the country will invest more than EUR 500.0 million to promote the

<sup>2</sup>

[https://single-market-economy.ec.europa.eu/sectors/construction/european-construction-observatory-eco/country-fact-sheets/greece\\_en](https://single-market-economy.ec.europa.eu/sectors/construction/european-construction-observatory-eco/country-fact-sheets/greece_en)

digital transformation of the education and health system, while nearly EUR 750.0 million will be invested in digital upskilling<sup>3</sup>.

With regards to non-residential construction and infrastructure, there are 118 projects in progress, but not yet funded, in Greece's infrastructure pipeline. These projects are collectively valued at EUR 43.4 billion. They comprise energy projects, railways and motorways, tourist infrastructure and waste management projects.

## **Impact of Green and Digital Transitions on the Broader Construction Sector**

Energy poverty and energy efficiency are the main goals of building sector initiatives. Up to 2030, Greece intends to extend current initiatives by renovating 68,000 residential buildings. The Electra program supports energy efficiency improvements of public buildings. To reduce energy consumption and combat energy poverty, Greece promotes energy-efficient solutions, such as solar thermal water heaters. The country aims to phase out fossil fuel boilers by 2040.

Demand for new skills to implement the green and digital transitions is growing and could be an opportunity for the future sustainable competitiveness of Construction.

## **Thematic Analysis of State-of-the-Art Digitalisation in Construction (Housing 4.0)**

### **Key digital technologies**

Key digital technologies entering the Greek market include:

Building Information Modelling (BIM) – the cornerstone of Greece's digital transformation in construction. The Ministry of Infrastructure and Transport has launched the National BIM Strategy and Roadmap (2024–2029). While BIM is not yet mandatory in public procurement, its integration in pilot projects and public infrastructure design is expanding, supported by universities and professional chambers.

Digital twins are being introduced through pilot projects and research initiatives in energy renovation and public infrastructure. These virtual replicas of buildings allow real-time performance monitoring, predictive maintenance, and data-driven decision-making throughout the building lifecycle. Digital twin technologies support Greece's energy transition and renovation wave, enabling performance

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3

[https://commission.europa.eu/business-economy-euro/economic-recovery/recovery-and-resilience-facility/country-pages/greeces-recovery-and-resilience-plan\\_en](https://commission.europa.eu/business-economy-euro/economic-recovery/recovery-and-resilience-facility/country-pages/greeces-recovery-and-resilience-plan_en)

tracking for buildings upgraded under NRRP programmes like ELECTRA and Energy Efficiency at Household.

e-Permitting & Digital Building Identity: Building permits are issued exclusively online via TEE's e-ΑΔΕΙΕΣ; the Electronic/Digital Building Identity (E-ID) creates a digital logbook of each building (blueprints, EPC, cadastral ID), underpinning asset data for digital twins.

Artificial Intelligence (AI) and Data Analytics for Energy Management: AI algorithms are increasingly applied to optimize HVAC systems, lighting, and renewable-energy integration in both new constructions and retrofitted buildings. Municipalities such as Athens, Thessaloniki, and Trikala are testing AI-driven energy management in smart-city contexts, with funding from EU digital innovation programs.

Internet of Things (IoT) in Buildings: IoT-based monitoring systems are increasingly integrated into public buildings renovated through NRRP and ELECTRA initiatives, supporting Greece's broader shift toward smart and efficient building operation.

Life-Cycle Assessment (LCA) and Digital Material Passport: To align with the EU Circular Economy Action Plan and the revised Energy Performance of Buildings Directive (EPBD), LCA tools and material passports are gaining traction in Greece. Research institutions (e.g., NTUA, CRES) and regional energy agencies are testing digital tools to evaluate embodied carbon, assess renovation options, and promote sustainable materials management.

## **Adoption and Impact in Construction Processes and Building Operation**

The National BIM Strategy (2024–2029) is a major step forward, While BIM is not mandatory, starts to increasingly being used by large design and engineering firms, particularly in infrastructure, energy renovation, and public-building projects. Universities and professional bodies such as the Technical Chamber of Greece (TEE) and PEDMEDE are expanding BIM-related education and training. However, the majority of Greek construction firms, especially SMEs, still rely on traditional 2D CAD workflows, with limited data sharing and no integrated project management platforms,

Digital tools such as BIM, energy simulation software, and LCA models are being tested in building-renovation projects under NRRP programs like Electra and Exoikonomo ("Save Energy at Home"), mainly for energy audits.

Some municipalities (Athens, Trikala, Thessaloniki, Ioannina) and public bodies have introduced IoT-based energy monitoring in public buildings, mostly through EU projects or partnerships with research institutions. Data from smart meters and sensors is used to track electricity, heating, and water consumption, supporting energy-efficiency reporting.

## **Current qualifications & emerging job profiles**

Greece's construction workforce is highly experienced but ageing, with many professionals trained under conventional methods of design and project delivery. The sector is still dominated by small-scale operations, with limited exposure to advanced digital tools such as BIM or digital twins. A major skills gap exists between what is required for digital transformation and the current technical capacity of the workforce, particularly among SMEs.

Increasing digitalization and moving towards a more service-oriented economy, including within manufacturing, will lead to a greater use of higher-level occupations. At the other end of the spectrum, lower-level occupations supporting production and the service sector seem to be decreasing as well as some intermediate occupations. The strength of most intermediate occupations, with a strong intermediate qualification level in Greece, limits the overall effect on medium-qualified occupations. Building and related trade workers, as well as industry-based Metal, machinery, and related trade workers, are expected to decrease, most likely due to increases in automation within the sectors (CEDEFOP, 2025).

Emerging job profiles are mostly related to smart building operation and automation technologies including the use of sensors, control systems, and building management systems (BMS) for real-time monitoring and optimisation of energy performance. : BIM coordinator/manager, digital construction technician (CDE admin), building data modeler, energy-data analyst, IoT technician, renovation-passport advisor. EU skills guidance (CEDEFOP/UNESCO-UNEVOC) highlights micro-credentials, upskilling and apprenticeships for green/digital transition.

### **Relevant market trends shaping the demand and supply**

Based on the responses of construction companies to the Business and Consumer Surveys carried out monthly by the IOBE on behalf of the European Commission, labor shortages are highlighted as the main obstacle to growth in 2023. In Greece, the supply of low- and medium-skill workers is expected to be below what is required by demand by 2035, while the supply of high-skill workers is expected to broadly meet the demand for those qualifications. Labor shortages are therefore the main concern for construction companies in the current period, having even risen sharply since 2022, coupled with the demand for new skills to implement the green and digital transitions is growing

## **Circular Economy & Sustainable Construction Materials**

### **Principles and Practices (e.g., reuse, recycling, waste management strategies)**

Greece's Governmental Economic Policy Council endorsed a National Action Plan on Circular Economy (CE) in early 2018 to set the country on a path towards the long-term adoption of CE principles. This supports Greece's economic strategy in its key quest to green the economy in a way that creates jobs, especially for women and youth, and long-term equitable and inclusive growth based on resource efficiency, promotion of SMEs, innovation and investment in new technologies, and boosting of the "social economy" potential.

Moreover, the Greece's "National Energy and Climate Plan" (NECP) is as a Strategic Plan for climate and energy issues, presenting a detailed roadmap for achieving specific Energy and Climate targets by 2030. It outlines and analyses the priorities and necessary policy measures across a broad spectrum of

development and economic activities, benefiting Greek society, establishing it as a reference document for the next decade. The Long-Term Strategy (LTS) for the year 2050 is a roadmap for the country's climate and energy policies, aiming to achieve climate neutrality by 2050. This strategy begins from 2030 and incorporates the objectives of the NECP, proposing technological solutions applicable to the domestic market. It also aims for flexibility in energy policy to adapt to technological advancements and fluctuations in energy consumption across economic sectors post 2030. According to the NECP, the national target for the share of renewable energy sources (RES) in the final energy consumption is at least 35%, exceeding the European target of 32%.

The National Waste Management Plan (2020–2030), both of which prioritize construction and demolition (C&D) materials as key value chains for resource efficiency and waste reduction. The National Circular Economy Strategy (2022–2030) identify construction and demolition waste (CDW) as a priority value chain for achieving resource efficiency, waste reduction, and low-carbon growth. The transition is further supported by the National Waste Management Plan (2020–2030) and the National Recovery and Resilience Plan (Greece 2.0), which promote sustainable building materials, selective demolition, and digital monitoring of material flows. The Region of Attica and the Municipality of Athens are piloting selective demolition and material reuse schemes within urban regeneration projects, in collaboration with research institutions.

## Sustainable Materials and their Application in Buildings

Energy-efficiency programmes such as “Exoikonomo” and “Electra” promote the use of environmentally certified insulation products.

Several pilot projects under the Circular Economy Action Plan (2021-2030) promote the reuse of construction and demolition waste (CDW) in road construction and non-structural concrete applications.

Greek research institutions such as the National Technical University of Athens (NTUA) and CERTH are developing nano-enhanced materials that improve surface durability, self-cleaning properties, and UV resistance. These technologies are being tested in energy-efficient building retrofits under Horizon Europe and NRRP-funded projects.

Greek companies like FIBRAN, ALUMIL, and Isomat are introducing eco-insulation products, EPS-recycling systems, and aluminium systems with recycled content, aligned with EU taxonomy and EPD certification standards. These support the transition toward Nearly Zero-Energy Buildings (nZEB) performance requirements.

Pilot initiatives in Attica, Thessaloniki, and Crete promote material recovery platforms where demolition materials, metal components, and tiles are reused or resold. The National Recovery and Resilience Plan (NRRP) includes funding for “Green Building Clusters”, integrating material recovery with local circular economy practices.

Greek manufacturers are beginning to align with European sustainability criteria, although innovation is still concentrated among a few major players and research consortia:

- HERACLES Group (LafargeHolcim) – producing EcoPlanet low-carbon cements and investing in alternative fuels and recycled aggregates.

- FIBRAN – developing insulation products made with recycled materials and improved thermal efficiency.
- ALUMIL – applying circular aluminium production with over 60% recycled content and Environmental Product Declarations (EPDs) for façade systems..

Nevertheless, the combination of traditional Mediterranean materials (stone, lime plaster, wood) with modern bio-based composites presents a growing opportunity for sustainable regional architecture.

## Current qualifications & emerging job profiles

Emerging training needs by 2030 in the fields of renewable Energy and energy efficiency. The majority of technicians and skilled workers employed in the Greek building construction sector consider it highly important to develop competencies related to:

- Energy-efficiency upgrades and renewable energy integration – particularly in the installation of insulation systems, energy-efficient windows, heat pumps, photovoltaic systems, and solar thermal solutions in both residential and public buildings.
- Carbon footprint assessment and life-cycle thinking – understanding the embodied carbon and environmental impact of materials and systems throughout their life cycle, as required by emerging EU sustainability regulations.
- Circular construction and resource efficiency – skills related to the reuse, recycling, and recovery of building materials, as well as the application of circular design principles in new construction and renovation projects.
- Deep renovation and modular/industrialized construction solutions – the ability to implement comprehensive renovation projects using prefabricated and modular components, improving both construction speed and energy performance.

## Relevant market trends shaping demand & supply

The revision of KENAK (Energy Performance Regulation) and alignment with the EU Taxonomy are tightening energy and environmental standards, creating growing demand for eco-insulation, low-carbon cement, and recycled materials. Over 55% of buildings in Greece were built before 1980; EU-funded renovation programs (e.g., “Exoikonomo”) support large-scale upgrades and drive demand for energy-efficient materials and modular retrofit systems.

At the same time, rising prices of traditional construction materials, prices of traditional materials (cement, steel) increased by 4–6% in 2024–2025 (ELSTAT, 2025) encouraging the adoption of lower-cost, sustainable, and locally sourced alternatives. On the supply side, domestic producers such as TITAN and HERACLES are innovating with low-carbon cements, clinker substitution, and carbon capture technologies, expanding the availability of sustainable materials in line with EU standards. The number of LEED and

BREEAM certified projects growing significantly in recent years, strengthening demand for certified eco-materials.

## **Cross-Cutting Analysis & Opportunities**

### **Interlinkages and Synergies between the Thematic Areas**

Digitalization, circular economy principles, and sustainable materials are increasingly interconnected pillars of Greece's construction transition. Together, they support a shift towards low-carbon, resource-efficient, and data-driven building practices aligned with the EU Green Deal and Greece's Circular Economy Strategy. The combined use of BIM, material passports, and LCA tools can substantially improve resource efficiency, waste prevention, and carbon performance across the building life cycle.

### **Common Challenges and Barriers across Diverse European Regions (e.g., policy, financial, skills-related)**

Broader challenges for the sector remain, these include, among others, issues related to human resources and financing of the sector's enterprises, the outlook for Construction after the completion of the Recovery and Resilience Facility in 2026, the institutional framework of the public works production system and the national infrastructure planning, the integration of technology and the digitalization of Construction in order to enhance the sector's productivity, the adaptation of the sector to climate change and, finally, the adoption of ESG standards by construction companies. In particular, labor shortages are highlighted as the main obstacle to growth in 2024 and financing difficulties have also had an impact on construction activity. The estimated growth in domestic construction activity in the next few years will create additional labor needs of various skills. According to the study's estimates, total construction employment could increase in the period 2025-2026 to about 236 thousand workers, a level that is 26 thousand workers higher compared to total construction employment in 2024 (210 thousand workers) (IOBE, 2025)

The most critical barriers that equally limit their access to training programs include the cost of education, the lack of available time for participating in training programs, the inadequate institutional framework, the lack of suitable educational programs, the end-users' ignorance about qualification certification which results in no added perceived value.

### **Innovation Opportunities in VET for Sustainable Construction (identifying promising areas for intervention)**

Innovation opportunities lie in integrated training programs that combine:

- Digital construction tools (e.g., BIM, digital twins, drones for site monitoring);
- Energy performance and circular design principles;
- Practical application of sustainable materials
- Focus on selective demolition, material recovery, waste sorting
- Modular VET programs that link practical construction skills with energy transition technologies
- SMEs and workers often lack training in LCA, eco-material applications, and waste management, highlighting the need for VET innovation and certification schemes.

## Conclusions and Recommendations for WP4

### Key Findings Summary (synthesis of the most important insights)

There is significant potential in up-skilling and re-skilling the labour force, especially in terms of digital skills. CEDEFOP highlights that medium-qualified occupations in Greece are particularly affected by the digital and green transitions, with gaps emerging in the use of BIM, digital twins, IoT systems, and energy performance monitoring. Labor shortages in both low- and medium-skilled positions are projected to continue up to 2035, making targeted training essential for sector growth and competitiveness.

### Strategic Insights for Curriculum and Training Programme Design (direct recommendations for WP4)

Training programs in Greece should expand modules on selective demolition, CDW sorting, secondary materials specification, lifecycle/material-traceability tools, and circular procurement.

Most technicians in the building construction sector consider it essential to acquire skills for implementing measures to improve energy efficiency and integrate renewable energy technologies/systems in buildings. Following closely in importance are the skills related to the smart operation of buildings (explicitly referring to sensors, control systems, and building management systems), the carbon footprint during the life cycle of a material/system, the circular construction, and the efficient use of resources, as well as the skills related to the comprehensive renovation of buildings, including among others, through modular and industrial solutions.

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## Annex 6: State-of-the-Art National Report - Italy



# REPORT ON THE STATE OF THE ART

## ITALY

## ● Introduction

This task aims to provide an overview of current practices and innovations in sustainable and energy-efficient construction in Italy, focusing on their integration into training, qualifications, and innovation frameworks. Specifically, the report seeks to:

- Explore sustainable housing practices and innovations, with emphasis on digitalisation (Housing 4.0) and circular economy approaches.
- Examine how these innovations intersect with education and training, particularly in VET and lifelong learning.
- Identify market and policy trends shaping the demand for new skills and qualifications.
- Highlight how publicly funded projects promote synergies between sustainability, digital transition, and workforce development.

The analysis was conducted through desk research, combining literature review, case study analysis, comparative framework review, and stakeholder mapping to capture the current landscape and relevant needs of construction professionals, policymakers, VET institutions, and end-users.

## – General Context: Italian Construction Sector & Energy Transition

This section provides a concise overview of the Italian construction sector in the context of the energy, sustainability and digital transitions. It reviews policy and regulatory landscape, the overall market dynamics and the key trends in construction and, finally, the impact of the green and digital transitions on the broader construction sector.

### 2.1. Policy and Regulatory Landscape

As for the other EU member States, the Italian construction sector is guided by a comprehensive framework of European and national policies and regulations promoting sustainability, energy efficiency, and digitalisation. At the European level, key initiatives include the **Energy Performance of Buildings Directive (EPBD)**, the **European Green Deal**, the **Renovation Wave**, the **EU Circularity Action Plan** and the **EU Taxonomy for sustainable construction**, which collectively set ambitious targets for climate neutrality, energy efficiency, and circular economy adoption.

- **National policy incentives, initiatives and strategies:**
  - **Superbonus 110% & Ecobonus:** Fiscal incentives for residential energy-efficient renovations, driving market uptake of energy and sustainability improvements. Launched in 2021, Superbonus was a 110% tax deduction until 2023, whereas it dropped to lower percentage until the end of 2025. It is estimated to improve approx. 500,000 buildings in

total (5.8% of Italy's housing stock), mostly multi-apartment and single-family buildings (FIEC, 2025).

- **Digitalisation and circularity initiatives:** Promotion of Building Information Modelling (BIM), digital hubs, and circular material practices to increase efficiency and sustainability. These topics are dealt with recent legislative review, definition of updated strategies and roadmaps, bottom-up actions fostered by the construction ecosystem.
- **Regulatory Measures:**
  - **Minimum Environmental Criteria (Criteri Ambientali Minimi, CAM):** National mandatory sustainability and circularity requirements in public procurement projects, introduced in 2017 and updated with mandatory regulations by the Ministerial Decree 256/2022.
  - **National Recovery and Resilience Plan (Piano Nazionale di Ripresa e Resilienza, PNRR):** The central strategic instrument – co-funded by the EU during the Covid-19 crisis - shaping public investment until 2026. Beyond a funding mechanism, the PNRR is a comprehensive reform agenda that prioritises urban regeneration, digitalisation, and green innovation, with a substantial share of resources allocated to construction-related activities (Grestone, 2023).
  - **Reform of the Public Contracts Code (Legislative Decree 36/2023):** Legislative overhaul aimed at streamlining procurement procedures and facilitating investment in green technologies, research, and innovation. This reform directly impacts the construction sector by modernising rules for its largest client: the public sector (Grestone, 2023). Among its main novelties, from January 2025 the reformed Code introduced the **mandatory use of BIM** for the design and construction of new public buildings, and for the renovation of heritage buildings – under certain economic thresholds.
  - **National Circular Economy Strategy:** Identifies construction as a priority sector for circular economy practices. It strengthens regulatory tools such as the “End of Waste” criteria and the CAM, encouraging more circular approaches across the industry (Construction.gov.it, 2022).
  - An additional relevant instrument is the **PNIEC – National Integrated Energy and Climate Plan** (updated 2024), which outlines the national strategy to 2030, including emission reduction targets and renewable energy goals. The latest version of the plan is available from the Ministry of Environment and Energy Security. The PNIEC 2024 also links to Italy's obligations under EU climate and energy governance, including objectives on energy efficiency, decarbonization, and the integration of renewables.

Despite these opportunities, several challenges remain. The financial sustainability of incentives, especially the Superbonus, limited absorption of PNRR funds, uneven digital and circular economy skills among SMEs, and gaps between VET supply and market demand constrain full sectoral transformation. These dynamics are reshaping professional profiles, highlighting the need for **green and digital skills** and

innovative VET pathways, including micro-credentials, work-based learning, and digital labs (European Construction Sector Observatory, 2020).

The Superbonus incentive represents an exemplary case from this perspective. The 2021 Budget Law allocated **EUR 69.8 billion**, of which **EUR 29.6 billion** was dedicated to energy efficiency and building renovation (European Construction Sector Observatory, 2021). However, despite strong demand and a relevant employment increase in the sector, as long as the incentive was full in place (2023), recruiting qualified personnel remains a challenge in the long term, underscoring the importance of targeted training and upskilling initiatives (CRESME, 2021).

## 2.2. Overall Market Dynamics and Key Trends in Italy

The construction sector is one of the cornerstones of the Italian economy, directly accounting for around **5–6% of GDP** and up to **20% when considering the full supply chain** (materials, services, professional activities) (Randstad Research, 2023). Its systemic importance is further underlined by the **3.1 million workers** employed directly or indirectly in the industry. In the post-pandemic period, construction acted as a primary engine of recovery, driving one-third of national GDP growth and generating a total production value of **€624 billion in 2023** (BigMat, 2023).

Yet, the sector's recent growth has shown a pronounced **dependency on fiscal incentives**, such as the **Superbonus, Ecobonus, and other building-related tax measures**, which significantly stimulated construction activity (BuildNews, 2023). With the gradual phase-out of these measures, forecasts indicate a contraction of **–5.3% to –7.4%** for 2024–2025, highlighting a boom–bust cycle largely influenced by government policy (Repubblica Finanza, 2024).

The market shows a **clear divergence between segments**. **Residential renovation**, once the main beneficiary of the Superbonus, is now facing a forecast **27% decline** due to the withdrawal of fiscal support. Yet, with **73% of Italy's 12.2 million buildings** in the lowest energy classes (E–G), long-term demand for energy upgrades remains structurally strong, especially in light of the EU's EPBD directive (ANCE, 2024). Nonetheless, "the wind-down of Superbonus building tax credit triggers a larger and more persistent contraction in housing investment, which has been a key source of growth over 2021–23" (OECD: 187, 2024).

By contrast, **public works and infrastructure** continue to expand — **+18% in 2023 and +20% expected in 2024** — driven by PNRR and EU funds, effectively stabilising the sector amid private market contraction (ANCE, 2024). **New housing and non-residential construction** show moderate growth, influenced by rising costs and financing constraints, but increasingly shaped by demand for sustainable, energy-efficient buildings.

In sum, while the Italian construction market has recently been shaped by **policy-driven volatility**, its **structural fundamentals—aging building stock, EU decarbonisation targets, and massive public investment pipelines—continue to ensure long-term transformation and resilience**.

Beyond market dynamics, the Italian construction sector faces crucial social challenges that directly impact workforce availability. Key issues include:

- **An aging workforce:** a significant portion of workers is approaching retirement age, making generational turnover urgent.
- **A gender gap and low attractiveness for young people:** the sector is perceived as unattractive, especially by women and new generations, due to cultural stereotypes and perceived harsh working conditions.

In line with the project's cross-cutting objectives, EXCEL4HOUSING4.0 intends to address these challenges by promoting **equity, inclusion, and diversity as levers for an effective social dimension** in the sector. Through targeted campaigns to enhance the attractiveness of VET (including those for gender balance) and the creation of modern training pathways, the project aims to make the construction sector a valid and appealing career choice for a broader and more diverse audience.

## 2.3. Impact of Green and Digital Transitions on the Italian Construction Sector

### *Green Transition*

The *Piano Nazionale di Ripresa e Resilienza (PNRR)* stands as the main driver until 2026, directing investment toward urban regeneration, sustainable renovation, and green infrastructure (Grestone, n.d.-a). Complementing this, the reform of the *Public Contracts Code* has simplified procurement and embedded sustainability criteria, while the *National Circular Economy Strategy* reinforces tools such as *End of Waste* criteria and *Minimum Environmental Criteria (CAM)* to promote resource efficiency and circular practices (Consultazione.gov.it, n.d.).

The abovementioned National Strategy for Circular Economy (SEC), adopted in 2022, provides a comprehensive framework to transition. The strategy outlines actions and objectives to promote the use of secondary raw materials, enhance waste traceability, and implement eco-design principles across various sectors, including construction. It identifies several economic instruments to support the circular shift in the sector, including tax incentives, regulatory reforms, and support for SMEs to adopt circular practices.

### *Digital transition*

On the digital side, the PNRR directly links public funding to innovation, accelerating the adoption of BIM, Building Energy Modelling (BEM) and Digital Infrastructure Management (DIM) in both public and private projects (Grestone, n.d.-a). Alongside this, technologies such as IoT, robotics, automation, and VR/AR are reshaping design and execution, while industrialised methods like prefabrication enhance efficiency and reduce waste (Corti, Roiatti, & Sala, 2025). Regional analyses, particularly in Lombardy, show how these dynamics are reshaping labour demand, with hybrid green-digital competences becoming increasingly essential (Corti et al., 2025).

The convergence of green and digital is most evident in the application of BIM to energy-efficient renovation, the use of digital traceability to ensure compliance with CAM standards and circular practices, and the gradual integration of sustainability and digital skills in training initiatives—confirming a structural shift in Italy's construction sector.

This twofold transition, while representing a huge opportunity, is also creating a **significant gap between the skills demanded by the market and the current VET training offer** in Italy. The adult participation rate in education and training in the construction sector has historically been low, rising only from 2.6% in 2010 to 3.3% in 2020, a figure considerably lower than the EU average of 7.4%. Indeed, companies report growing difficulty in finding both **specialized operators (EQF levels 3-5)**, capable of installing new technologies and applying sustainable building techniques, and **highly qualified professionals (EQF levels 6-8)**, such as construction managers, architects, and engineers with hybrid technical and managerial skills. The EXCEL4HOUSING4.0 project fits into this context with the aim of filling this gap by developing innovative and transnational training programs for both qualification levels.

## – Thematic Analysis of State of the Art

### 3.1 Digitalisation in Construction

#### 3.1.1. Key digital technologies: (e.g., Building Information Modeling (BIM), Digital Twins, Artificial Intelligence (AI) for energy management, Internet of Things (IoT) in buildings)

The Italian construction sector is undergoing a gradual digital transformation, driven by the need to enhance efficiency, sustainability, and competitiveness. However, the adoption of advanced digital technologies remains uneven, with small and medium-sized enterprises (SMEs) facing significant challenges due to limited financial resources, specialized human capital, and economies of scale. This disparity has resulted in a "digital divide" within the industry, as highlighted by ANCE's Observatory reports, which emphasize the necessity for a national digital platform for construction and a digital infrastructure that can easily connect and communicate with systems across Europe, ensuring compatibility with EU standards and facilitating cross-border collaboration (ANCE, 2022; ANCE, 2024).

Key digital technologies shaping this transformation include **Building Information Modeling (BIM)**, **Digital Twins**, **Internet of Things (IoT)**, and **Artificial Intelligence (AI)** for energy management. BIM is increasingly recognized not merely as a 3D modelling tool but as a collaborative methodology for managing information throughout the entire lifecycle of construction assets (ANCE, 2025). The adoption of BIM is being accelerated by national regulations, as said earlier, including the reform of the Public Contracts Code and the requirements under the National Recovery and Resilience Plan, which make BIM a standard for public projects and create strong incentives for SMEs to invest in digital capabilities (DIHCUBE, n.d.).

These tools, as Digital Twins, are employed to enhance energy efficiency and resource management, with partnerships such as Harpaceas & Ekore demonstrating the application of AI and digital twins to optimize building performance and reduce energy consumption (Harpaceas & Ekore, 2025). Despite initiatives like DIHCUBE, a national hub for unlocking digital innovation at the SME-level, and support for European projects such as DigiPLACE, (DigiPlace, n.d.), digitalisation remains a challenge for many SMEs. ANCE reports indicate that the majority of firms are still far from fully adopting advanced digital technologies, highlighting the need for further interventions to close the digital gap and enhance efficiency, productivity, and sustainability (ANCE, 2024; ANCE, 2025).

In summary, while Italy is making progress in the digitalisation of the construction sector, greater dissemination of digital technologies among SMEs is necessary to bridge the gap and fully leverage the potential offered by digital transformation.

With this regard, DIHCUBE represents a pivotal opportunity for SMEs to upskill and improve their knowledge about existing and emerging digital technologies in the sector. Co-funded by the PNRR and coordinated by ANCE - the National Association of Italian Constructors - DIHCUBE brings together universities, research centres and consultancies to train enterprises and experiment directly digital technologies. The funding coverage is proportional to the business dimension, thus increasing the opportunity for the smallest ones.

### 3.1.2. Adoption and impact in construction processes and building operation

Digital technologies are gradually transforming Italian construction, but adoption remains uneven due to the sector's fragmentation and prevalence of micro-enterprises (ANCE, 2022; DIHCUBE, n.d.).

In **design and procurement**, BIM is increasingly used in public projects and large private developments to coordinate disciplines, quantify materials, and link design to procurement workflows (ANCE, 2025). SMEs lag behind, often using only basic digital tools, while initiatives like DIHCUBE support their integration of advanced solutions (DIHCUBE, n.d.).

In **construction and materials**, prefabrication, off-site production, and digital quality control reduce errors and waste, while digital tools support circular construction and Life Cycle Assessment (LCA), aligned with CAM and Italy's Circular Economy Strategy (Consultazione.gov.it, 2025). Timber and hybrid wood constructions benefit from digital design to optimize prefabrication and energy performance (ANCE, 2025).

In **operation**, buildings with digital twins, IoT, and BMS show improvements in energy efficiency, predictive maintenance, and occupant comfort (Harpaceas & Ekore, 2025).

**Impacts and barriers:** Digitalisation enhances quality, efficiency, and carbon performance, but SMEs face challenges including limited skills, heterogeneous data, and investment needs. This creates a "digital divide" where digitally mature firms achieve higher efficiency and profitability (ANCE, 2022; DIHCUBE, n.d.; Harpaceas & Ekore, 2025).

#### i. Current qualifications and emerging job profiles

Emerging job profiles are increasingly shaped by the twin green and digital transition. The adoption of technologies such as BIM (Building Information Modelling), BEM (Building Energy Modelling), DIM (District Information Modelling), IoT, robotics, automation, virtual and augmented reality, and industrialized construction methods (e.g., prefabrication) is transforming the skills required of construction professionals (Excelsior Unioncamere, 2024; ANCE, 2025). Workers are expected to combine traditional technical competencies with new capabilities in digital tools, energy efficiency, sustainable materials, and circular construction processes.

These shifts highlight an urgent need and pplan for targeted upskilling and reskilling initiatives. The following section presents innovative professional profiles highlighted by the RES2 project (*Resilient System for Recognition of Energy Skills*), which conducted an in-depth analysis of the Italian context and

regional qualification frameworks (Repertori Regionali delle Qualifiche Professionali) to identify emerging roles and evolving trends in the construction sector (RES2, n.d.). By means of this mapping effort, the project identified evolving professional profiles – mixing traditional and innovative skills – and more innovative ones, resulting in the following list related to the digital domain:

m. **BIM Technician**

Responsible for developing and managing building information models, integrating traditional drafting and technical competencies with BIM processes. This role may also include tasks traditionally held by building drafting and architectural construction technicians or engineers.

n. **Construction Process Digitalization Technician**

Supports decision-making processes by processing and structuring project information. Performs complex tasks related to project development, calculations, and data management to optimize construction processes.

o. **Home Automation Systems Technician**

Specializes in designing, installing, and optimizing building automation systems, integrating digital and technical skills to improve efficiency and control of smart home technologies.

p. **3D Design and Printing Technician**

Manages 3D modeling and printing for construction applications, producing digital prototypes, components, and technical models, often requiring autonomous decision-making and handling complex design tasks.

q. **Drone Operator**

Conducts drone operations for surveying, volumetric calculations, or photogrammetry. May also analyze and process collected data to support technical and operational decisions on construction sites.

▪ **Relevant market trends shaping the demand and supply**

The Italian construction sector continues to experience significant workforce dynamics, driven by a combination of **replacement needs**, **expansion of activity**, and the increasing adoption of advanced construction technologies. Between 2024 and 2028, it is estimated that **245,000–280,000 positions will need to be filled to replace retiring workers** (replacement demand), while an additional **405,000–832,000 positions are expected due to sector growth** (expansion demand) (Excelsior Unioncamere, 2024). This implies a total projected increase of **30,000–64,000 workers** over the five-year period, highlighting the ongoing expansion of the sector.

The demand is particularly pronounced for **highly skilled roles**, accounting for approximately 39% of total demand (~1.3–1.4 million positions), including managers, specialists, and technical professionals (ANCE, 2025). **Skilled construction workers**, responsible for building, maintenance, and finishing, are expected to number **136,000–156,000**. Supporting roles in metalworking and machinery operations are also significant. Assemblers and machinery maintenance workers (58,000–63,000), welders and metalwork installers (31,000–36,000), earth-moving and lifting equipment operators (20,000–22,000), and drivers of motorized vehicles, mainly heavy machinery (74,000–82,000) play a key role in ensuring smooth construction processes.

This combination of replacement needs, sector expansion, and adoption of digital and green technologies emphasizes the critical importance of equipping the workforce with the necessary skills to leverage BIM, digital twins, IoT, green construction methods, and industrialized processes. This ensures sustainable growth and competitiveness for the Italian construction sector.

## o Circular Economy & Sustainable Construction Materials

### 3.2.1. Principles and Practices

Italy has placed the circular economy (CE) at the core of its environmental policy framework with the adoption of the **National Circular Economy Strategy (2022)** and the **National Waste Management Programme 2022–2028 (PNGR)**. These strategies set macro-objectives including: developing secondary raw material markets, strengthening Extended Producer Responsibility, introducing taxation to promote CE, enhancing eco-design and product life extension, improving waste stream traceability, and fostering CE-related skills across sectors (ETC-CE, 2024).

In the construction sector, circularity principles translate into **different scales and practices**. At the urban scale, *urban mining* considers cities as reservoirs of reusable materials, while at the building scale, the *building as material bank* approach recognizes the stored value of construction products and components. At the product level, emphasis is placed on **reuse, recycling, and design for circularity**—including adaptability of spaces, reparability, and the producer's responsibility throughout the lifecycle of products (GBC Italia, 2019).

Current practices in Italy reflect both **end-of-life strategies** and **design-stage approaches**:

- **End-of-life approaches:** selective demolition, advanced waste management systems, and prioritization of refurbishment over demolition.
- **Design approaches:** *design for disassembly* and *design for durability/flexibility*, ensuring that new buildings can be adapted, dismantled, and materials reused.

To ensure transparency and compliance with green public procurement, certification systems are increasingly adopted. Among these, **ReMade in Italy®** has emerged as a key certification scheme, verifying recycled content in materials and aligning with the Italian Public Procurement Code and *Criteri Ambientali Minimi* (CAM). This certification is recognized as valid proof whenever CAM requires the use of recycled-content products (Grestone, 2023).

Altogether, these frameworks and practices illustrate how Italy is embedding CE principles into construction, moving from policy commitments to practical applications across design, construction, and end-of-life phases.

### 3.2.2. Sustainable Materials and their Application in Buildings

Among sustainable materials, **wood stands out as a circular material for excellence**. Naturally renewable, 100% recyclable, and capable of storing carbon dioxide, wood plays a crucial role in mitigating climate change. Its long lifecycle allows for multiple reuses: after its first application, it can be collected, recycled, and transformed into new products, thus extending its environmental and economic value.

Italy is a European leader in wood recycling, with **64.5% of packaging recycled**, far exceeding the EU target of 30% by 2030. For instance, over the past 25 years, **Rilegno** has built a circular system that recycles nearly **2 million tons of wood annually**, regenerates more than **70 million pallets**, and saves approximately **1.9 million tons of CO<sub>2</sub> emissions each year** (Rilegno, n.d.; Ingenio-Web, 2024).

At the same time, wood is increasingly used in **sustainable building practices**, particularly through the adoption of **timber construction systems** such as cross-laminated timber (CLT) and laminated veneer lumber (LVL). According to the **VIII Annual Report by FederlegnoArredo**, Italy ranks as the **third-largest European producer of wooden houses**, with **3,602 new housing units built in 2022** and a turnover of **€2.3 billion**. This sector is experiencing steady growth, driven by rising awareness of sustainability and supported by a concentration of specialized companies, particularly in northern regions such as **Trentino-Alto Adige, Lombardy, and Veneto** (FederlegnoArredo, 2023).

The combination of high recycling performance and growing use of engineered timber in construction positions wood as a **key enabler of the circular and sustainable transition in the building sector**.

### 3.2.3. Current qualifications and emerging job profiles

The Italian construction sector is experiencing a rapid transformation, requiring new professional profiles and updated qualifications. According to the *Skills Intelligence Forecast* by ART-ER and Clust-ER BUILD (2024), the most in-demand profiles to some extent linked to the circular skills, include:

- **Environmental and energy efficiency technician** → faces shortages due to a limited pool of candidates and inadequate training.
- **Construction site technician** → a hybrid figure positioned between design work and on-site operations, often affected by cultural and gender biases. Despite existing training paths at both university and post-diploma level (ITS – *Istituti Tecnici Superiori*, Higher Technical Institutes, and IFTS – *Istruzione e Formazione Tecnica Superiore*, Higher Technical Education and Training), there is still a lack of suitable candidates for this role.
- **Project manager assistant** → increasingly relevant for managing complex building processes.
- **BIM-related profiles (BIM Manager, BIM Coordinator, BIM Specialist)** → crucial for digitalization and integration of design, construction, and building operation.
- **Diagnostic technician** → limited by the absence of certification programs on diagnostic tools and data management, even if historical knowledge of existing materials remains solid.
- **Territorial monitoring technician** → currently linked mainly to waste management, but with the potential to evolve towards analyzing landslides, extreme weather events, and their integration into urban planning and mitigation strategies. The lack of training paths remains a barrier.
- **Data scientist** → increasingly needed in construction to process and interpret large datasets. However, the absence of targeted educational pathways and limited awareness among companies hinder recruitment.

This mapping highlights both the **growing demand for specialized and hybrid profiles** and the persistent **training gaps**, underlining the need for updated educational strategies to support circular economy practices, digitalization, and climate adaptation.

### 3.2.4 Relevant market trends shaping the demand and supply

Overall, the interplay of **sustainability imperatives, innovation in building technologies, and market consolidation through certification systems** is reshaping both demand and supply in Italy's **sustainable and circular construction sector**. A notable share of the sector is increasingly oriented towards **timber construction**, driven by the material's environmental performance, recyclability, and growing market acceptance. In this context, certification schemes such as **ARCA (Architettura Comfort Ambiente)** play a crucial role in establishing **quality, durability, and sustainability standards**, providing a benchmark for certified timber buildings and supporting the development of a structured market for wood-based construction (ARCA, n.d.; FederlegnoArredo, 2023).

Concrete examples of these trends and the excellence achieved in Italy's timber construction sector are the flagship projects cited in the EXCEL4HOUSING4.0 proposal, such as the **"Ex Marangoni" district in Rovereto** and the **"Trentino Social Housing Building" in Trento**. The former represents a benchmark for sustainability, being a 9-story building made of Cross Laminated Timber (CLT) with very high energy efficiency (A+ class) and an advanced level of circularity, built largely with wood recovered from the "Vaia" storm. The latter is an example of a certified wooden building ("ARCA certification") that combines high anti-seismic and fire safety requirements with excellent energy performance (Class A/A+).

These projects are not just technological showcases but true **"living labs"**: their analysis allows for the identification of the specific skills—both at the technical-operational and design-managerial levels—needed to replicate such models on a large scale, thus providing a fundamental knowledge base for designing the project's training programs.

## 3.3 Conclusions and Recommendations for WP4

**Policy & Market Drivers:** Italian construction relies on incentives (Superbonus, Ecobonus) and EU/National policies for sustainability, energy efficiency, and digitalisation; public works and PNRR-funded projects stabilize the sector amid residential slowdown.

**Green & Digital Transformation:** Adoption of circular economy practices, energy-efficient renovation, and digital tools (BIM, IoT, AI) is reshaping design, construction, and operations, though SMEs face adoption challenges.

**Sustainable Materials & Timber:** Wood is central to circular and sustainable construction—100% recyclable, carbon-storing, and widely used in engineered timber buildings; certifications like **ARCA** create a structured market and ensure quality.

**Skills & Workforce Needs:** High demand for specialized and hybrid profiles (BIM specialists, energy technicians, construction site technicians, data scientists) highlights urgent need for training and upskilling to align workforce with green and digital transitions.

**Integration of European initiatives:** build on Erasmus+ **Centres of Vocational Excellence (CoVE)** to reinforce the link between training provision and innovation in sustainable housing.

**SME-focused approach:** ensure targeted support for SMEs through modular training and mentoring schemes, reducing structural skill gaps and enabling adoption of digital and green practices.

**Micro-credentials for new profiles:** promote short and flexible credentials that certify competences in emerging roles (e.g., BIM specialists, circular construction technicians, green building assessors), aligning training with real labour market demand.

### 3.3.1 Strategic Insights for Curriculum and Training Programme Design (direct recommendations for WP4)

**Modular and tailored learning paths:** develop short, flexible training modules that can be combined to build progressively higher qualifications. Modules could cover areas such as energy-efficient buildings, sustainable materials, circular construction, smart building technologies, BIM, and digital twins.

**Hands-on and applied learning:** integrate practical placements, living labs, and demonstrations at real construction sites.

**Trainer development and mentoring:** scale up train-the-trainer initiatives to ensure instructors are proficient in both digital tools and circular economy principles. Mentoring, study visits, and coaching should support continuous professional development.

**Career pathways for emerging profiles:** define clear competency maps for new roles such as BIM Manager, Digital Twin Engineer, Material Passport Specialist, and circular construction technician. Link training modules to these profiles to support career development and meet market demand for specialized skills.

**Integration of soft and technical skills:** combine digital, sustainability, and technical competencies with project management, teamwork, and problem-solving skills to prepare learners for complex, hybrid roles in the construction sector.

**Leverage the expertise of Italian partners:** Utilize the specific skills of the Italian consortium partners to enrich the training programs. For example, integrate the experience of **University of Perugia** in the field of "Digital Techniques for the Sustainable Management of Buildings" into the digitalization modules, and structure the content of the **European ESG Academy** based on **Habitech's** expertise in sustainability certifications (e.g., LEED, BREEAM, ARCA).

**Focus SME training on concrete tools:** The capacity-building program for SMEs on the circular economy should concentrate on the practical application of the **Minimum Environmental Criteria (CAM)** and the use of certifications like **ReMade in Italy®**, which are crucial regulatory tools but often difficult for small and medium-sized enterprises to adopt.

**Integrate mobility as a learning tool:** In line with **TUCEP's** role as an accredited mobility agency, the training paths should actively provide for and promote opportunities for internships, job shadowing, and transnational exchanges as an integral part of the curriculum to accelerate the acquisition of practical and intercultural skills.

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Annex 7: State-of-the-Art National Report - Poland



# REPORT ON THE STATE OF THE ART

## POLAND

## ● Introduction

The purpose of this report is to present the current state of knowledge (“state of the art”) in the field of energy efficiency and sustainable housing practices in Poland, with particular emphasis on the European context. The analysis covers both technological and market issues, as well as aspects related to vocational education and training (VET), innovation, and digital and ecological transformation processes.

Housing construction is one of the key sectors for achieving the European Union's climate and energy goals. As the largest energy consumer in the EU, it accounts for around 40% of final energy consumption and 36% of greenhouse gas emissions. As a result, this sector is a priority in policies such as the European Green Deal, the Renovation Wave, and the EPBD directive on the energy performance of buildings.

The report covers:

- the political and regulatory context,
- market analysis and trends in the housing sector,
- the implementation of technological and process innovations (digitalization, sustainable materials, circular economy),
- current and future skills needs and their impact on the vocational education system,
- links between digital and green transformation and the resulting opportunities for education and the labor market.

The document was prepared on the basis of a review of scientific literature, reports from EU and national institutions, analyses of statistical data (Eurostat, Central Statistical Office, Cedefop), as well as case studies and examples of good practices in Poland and other European countries.

## ● Analysis summary

This document presents a comprehensive overview of the current situation, trends, and future directions in the field of energy-efficient and sustainable housing, analysed within the broader framework of the European Green Deal and the dual green and digital transitions shaping the construction sector. The study synthesises regulatory developments, market dynamics, technological innovations, and vocational education needs, linking national realities with European policy objectives.

At the policy level, the report highlights the alignment of Poland's strategic documents - such as Poland's Energy Policy to 2040 (PEP2040), the National Energy and Climate Plan (NECP) and the forthcoming National Building Renovation Plan (KPRB) - with EU frameworks like the Fit for 55 package, the Energy Performance of Buildings Directive (EPBD 2024/1275), and the Renovation Wave Initiative. Together, these instruments establish a roadmap toward a low carbon, circular, and climate resilient built environment. Poland's Clean Air Programme complements these policies by targeting thermal modernisation and heating-system replacement in single-family homes.

At the market level, the construction cycle shows both resilience and transformation. After a temporary slowdown in 2024, new permits and housing starts point to renewed activity driven by EU and national funding streams. Cost pressures and skill shortages remain constraints, yet digitalisation and green regulation continue to stimulate innovation. The sector is evolving toward data driven, performance based

construction, where digital workflows, life cycle carbon accounting, and energy efficient design are becoming standard requirements rather than optional features.

The green transition is reshaping technical requirements and workforce competences. The EPBD introduces zero-emission standards for new buildings, renovation passports, and mandatory disclosure of whole-life carbon (GWP). These regulatory shifts generate sustained demand for specialists in energy modelling, low carbon building services, quality assurance, and renewable integration. Simultaneously, circular economy practices such as selective demolition, material passports, and water reuse, are gradually entering mainstream practice, though adoption remains uneven.

The digital transition complements this shift. Poland has developed a robust digital ecosystem in construction, including *e-Budownictwo*, *SOPAB*, the *Electronic Construction Logbook (EDB)*, and the *Digital Building Book (c-KOB)*. These tools increase transparency, simplify permitting, and facilitate compliance with energy and carbon standards. The staged introduction of Building Information Modelling (BIM) into public procurement is accelerating the sector's move toward integrated, collaborative, and verifiable workflows.

Labour market analysis reveals structural shortages in traditional trades and emerging demand for hybrid profiles combining craftsmanship, environmental literacy, and digital proficiency. Occupations such as BIM Manager, LCA/GWP Specialist, Digital QA Coordinator, and Heat Pump Technician are rapidly gaining relevance. To address this, Poland's Sectoral Qualifications Framework and the emerging network of Centres of Vocational Excellence (BCU) play a crucial role in modernising curricula, fostering teacher-industry collaboration, and delivering modular training aligned with EU priorities.

From a crosscutting perspective, the report emphasises that energy efficiency, digitalisation, and circular economy are mutually reinforcing dimensions of a single transformation process. Digital tools enable performance monitoring and traceability; circularity complements energy goals by reducing embodied emissions and both transitions rely on a skilled workforce capable of managing complex, integrated systems.

In conclusion, the Polish construction sector is moving toward a more sustainable, digital, and innovation driven model. The success of this transition depends on coordinated policy implementation, targeted financing and a proactive approach to workforce development.

## ● Indicative outline

### ● Introduction

Purpose of the report: to present the state of knowledge and practices in the field of energy efficiency and sustainable housing construction, with particular emphasis on qualifications, innovation, and market trends.

Scope: analysis of the construction sector (housing – new buildings and renovations), policies, regulations, technologies, innovations, and links to vocational education.

## Methodology:

- desk research (EU reports, Eurostat, Central Statistical Office, Cedefop, PARP, KOBiZE),
- analysis of market and technological trends,
- case studies (pilot projects, good practices from Poland and the EU),
- regional comparisons.
- **General Context: European Construction Sector & Energy Transition**
  - Policy and Regulatory Landscape (e.g., EPBD, European Green Deal, Renovation Wave, EU Taxonomy relevant to construction)
  - Overall Market Dynamics and Key Trends in Construction (e.g., investment, growth drivers, consumer demand for sustainable housing)
  - Impact of Green and Digital Transitions on the Broader Construction Sector

## The European context and energy transition:

**European Green Deal** – EU growth strategy launched in 2019. The initiatives are aimed at energy transition and achieving climate neutrality by 2050. The Green Deal emphasizes the importance of all sectors in sustainable transformation. In the fight against climate change, support is given to measures in areas such as energy, transport, industry, agriculture, sustainable financing, etc. Our future depends on the condition of our planet, and increasingly frequent and severe extreme weather events have tragic consequences for people and the economy.

“The European Green Deal aims to make the EU the world's first climate-neutral region by 2050, reduce pollution, and restore nature and ecosystems to a healthy balance.”

The key objectives are:

- Climate neutrality – reducing gas emissions (EU as the first climate-neutral region);
- Circular economy – an economic model in which products are reused, repaired, and recycled (conserving resources and reducing waste).
- Clean industry – cleaner, more sustainable, and energy efficient industry that is well-adapted to the European and global market.
- Healthier environment – nature restoration and pollution control to ensure a healthy environment for future generations.
- More sustainable agriculture – eco-friendly farming practices will help protect the environment and provide healthy affordable food.
- Climate justice and equality – a fair and inclusive transition that does not exclude and leaves no one behind and helps those most affected.<sup>4</sup>

**EPBD Directive** – The Energy Performance of Buildings Directive, which was recast in 2024, is a continuation of the regulations on the energy efficiency of buildings introduced since 2002 at both national and EU level.

“The aim of the regulations is to rationalize energy consumption in existing buildings and to construct new buildings that meet appropriate energy standards.”

<sup>4</sup> Rada Europejska – Rada Unii Europejskiej, 2025, *Europejski Zielony Ład*,  
<<https://www.consilium.europa.eu/pl/policies/european-green-deal/>>

Requirements and effects:

- “Reducing energy consumption and its carriers, thereby improving energy security,
- reducing energy consumption costs in buildings,
- improving the standards of new and existing buildings,
- providing information to a wide range of stakeholders on the technical and energy status of buildings and the possibilities for improvement,
- contributing to the achievement of climate goals by reducing greenhouse gas emissions and other pollutants from buildings,
- focusing support tools on the most effective measures and the development of new and low-carbon solutions”.

Solutions resulting from the directive:

- minimum requirements for the energy performance of buildings – requirements are regularly modified and increased due to advances in construction, energy, and installation technology, growing user demands, and new policies. The requirements are tailored to optimize costs and stipulate that new public buildings must be carbon neutral by January 1, 2028, and other new buildings by January 1, 2030,
- improving the energy performance of buildings undergoing major renovation – renovation is the right time to improve the energy performance of a building. Various support systems are available, such as thermal modernization subsidies and programs such as Clean Air,
- national building renovation plan and progressive renovation trajectory for residential building stock (Polish KPRB document) – “The National Building Renovation Plan is an extension and replacement of the current long-term building renovation strategy. The document will define the concept of building renovation and the necessary measures to achieve high energy efficiency and low carbon emissions in buildings in Poland by 2050. The KPRB will be a strategic document containing the assumptions of a comprehensive policy integrating measures aimed at ensuring the renovation of the national stock of residential and non-residential buildings, both public and private, into highly energy-efficient, zero-emission, and decarbonized building stock by 2050. The document will also establish a progressive renovation trajectory for residential buildings and minimum energy performance standards for non-residential buildings”,
- new buildings with solar energy – EU countries are required to adapt their regulations to take into account the need to use solar energy; the requirements will come into force on December 31, 2026,
- renovation passport system – documents setting out action plans for the renovation of buildings, adapted as necessary to improve energy performance,

- requirements for technical building systems, infrastructure for sustainable mobility – requirements for technical building systems and infrastructure requirements for sustainable mobility will be updated to ensure consistency with the directive,
- financial incentives and market barriers – in order to ensure that financial support schemes for building renovation are effective, adequate, and targeted primarily at vulnerable households, people affected by energy poverty, and people living in social housing, rules based on the new directive should be introduced. The requirements include a ban on financial incentives for the installation of individual fossil fuel-fired boilers from January 1, 2025. After this date, the purchase of such equipment may not be financially supported by the state,
- one-stop shops for energy performance of buildings – it will be important to establish a new technical assistance infrastructure, which, among other things, will provide comprehensive services to citizens in the context of improving the energy efficiency of buildings,
- energy performance certificates – “the current national regulations need to be amended to bring them into line with the new directive, taking into account the state of standardization and the conclusions drawn from the functioning of the regulations to date. A draft regulation on the methodology for determining the energy performance of a building or part of a building and energy performance certificates implementing this provision is currently being processed. The energy performance certificate system has been in force in Poland since 2009. The provisions of the directive indicate the obligation to unify and establish the determination of the energy performance of a building through energy performance classes”,
- technical system inspections – systems such as heating, ventilation, air conditioning, etc. should undergo inspections to check their efficiency. Laws related to inspections should be updated to take into account new provisions.<sup>5</sup>

**Fit for 55** – The European Union's Fit for 55 package was announced in 2021 and contains a set of new climate regulations. The legislation was adopted to achieve a mandatory reduction of emissions in the EU by at least 55% by 2030. It will also help make the EU climate neutral by 2050. The document was developed by the Council working groups responsible for the given policy. Members discussed the matter in order to find a common position, so that an agreement could be prepared within the 27 countries. As part of the reform, the EU ETS (EU Emission Trading System) will be changed and made more ambitious. In addition a new separate emissions trading system was also created for buildings, road transport and fuels in additional sectors.

“The package has to:

- ensure that the transformation is socially just.
- maintain and increase the innovation and competitiveness of the EU industry, while guaranteeing equal opportunities for economic operators from third countries.

<sup>5</sup> Ministerstwo Rozwoju i Technologii, *Dyrektywa w sprawie charakterystyki energetycznej budynków (EPBD)*, <https://www.gov.pl/web/rozwoj-technologie/dyrektywa-w-sprawie-charakterystyki-energetycznej-budynkow-epbd>, access 18.08.25

- strengthen the EU's position as a leader in the global fight against climate change”.<sup>6</sup>

For Poland, this means a significant acceleration of energy efficiency improvements, renewable energy integration, and low-carbon technologies in housing and transport. The inclusion of buildings and road transport in a new emissions trading system creates strong incentives for modernization, but also raises challenges. Higher renovation and energy costs could increase the risk of energy poverty, while carbon pricing on fuels may worsen social acceptance, particularly in a country with high car dependency and a still coal-intensive energy mix. At the same time, the package offers opportunities to modernise housing, stimulate green jobs, and improve long-term competitiveness of the Polish economy.

**Regulation (EU) 2020/741 of the European Parliament and of the Council of 25 May 2020 on minimum requirements for water reuse** – The regulation aims to improve water resource management in the European Union. The document highlights the importance of water reuse in the current situation.

“Water resources in the Union are under increasing pressure, leading to water scarcity and deterioration in water quality. The development of cities and agriculture has significantly contributed to the reduction of fresh water availability, particularly due to climate change, unpredictable weather phenomena, and droughts.

The Union's ability to respond to the growing pressure on water resources can be increased by promoting the reuse of treated wastewater, limiting the exploitation of single surface and groundwater bodies, limiting the effects of releasing treated wastewater into surface waters, and promoting water conservation through the multiple use of municipal wastewater, while ensuring a high level of environmental protection”.<sup>7</sup>

#### Policy and regulations in Poland:

**Poland's energy policy until 2040 (PEP2040)** – the policy outlines a vision for an energy transition strategy that aims for low- and zero-emissions and must ensure energy security. PEP2040 is one of nine Strategies for Responsible Development and was created for entrepreneurs, local governments, and citizens in mind. “PEP2040 involves strategic investment decisions aimed at leveraging the country's economic, raw material, technological, and human resources potential and creating, through the energy sector, leverage for economic development that promotes a just transition”.

According to plans, zero-emission sources are expected to account for more than half of installed capacity by 2040. The implementation and development of an offshore wind power system in Poland and the launch of a nuclear power plant will be key. These will be two new areas offering many opportunities – for development of national industry sector, human resource manager abilities, new workplaces, and generation of added value for domestic economy.<sup>8</sup>

**National Energy and Climate Plan (NECP, pl. KPEiK)** – The National Energy and Climate Plan is developed on the basis of Regulation (EU) 2018/1999 of the European Parliament and of the Council of 11 December 2018 on the Governance of the Energy Union and Climate Action. EU Member States are obliged to update the NECP every 5 years and to prepare a new plan every 10 years.

<sup>6</sup> Rada Europejska – Rada Unii Europejskiej, 2025, „Gotowi na 55”,  
<<https://www.consilium.europa.eu/pl/policies/fit-for-55/>>

<sup>7</sup> REGULATION (EU) 2020/741 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL from May 25, 2020 on minimum requirements for water reuse

<sup>8</sup> Ministerstwo Klimatu i Środowiska, 2025, *Polityka energetyczna Polski do 2040r.*,  
<<https://www.gov.pl/web/klimat/polityka-energetyczna-polski>>

The Energy Union, established in 2019, is based on:

- decarbonisation,
- energy efficiency,
- energy security,
- the internal EU energy market,
- research, innovation and competitiveness.

“The document integrates a very broad scope of issues – from the consumption of raw materials and energy and greenhouse gas emissions in individual sectors of the economy, to macroeconomic impacts. Energy forecasts are developed on the basis of methodologies and categories standardized at the international level. Greenhouse gas emission projections are prepared in accordance with the IPCC classification”.

The documents of each EU Member State are published on the European Commission's website.<sup>9</sup>

**Construction Law Act** – the Act regulates activities related to the design, construction, maintenance, and demolition of buildings, and defines the principles of operation of public administration bodies in these areas.

The scope includes:

- the principles of shaping the state's energy policy, the rules and conditions for the supply and use of fuels and energy, including heat, and the activities of energy enterprises, as well as the designation of authorities competent in matters of fuel and energy management,
- the conditions for carrying out and controlling activities involving the transmission of carbon dioxide for the purpose of underground carbon dioxide storage,
- the principles governing the functioning of the measurement system and the central energy market information system.

“The purpose of the Act is to create the conditions for the sustainable development of the country, to ensure energy security, the economical and rational use of fuels and energy, the development of competition, the prevention of negative effects of natural monopolies, the consideration of environmental protection requirements, the fulfillment of obligations arising from international agreements, and the balancing of the interests of energy enterprises and fuel and energy consumers”.<sup>10</sup>

**Clean Air program** – Clean Air is a comprehensive plan of actions aimed at improving energy efficiency and reducing emissions of dust and other pollutants into the atmosphere, as well as avoiding air pollution from new single-family homes. This is achieved through thermal modernization and the replacement of old household stoves and boilers. The program's beneficiaries are natural people who own single-family homes or a separate unit in a single-family building with a separate land registry book, as well as people who have permission to start building a single-family building. Individuals seeking funding can receive grants and/or loans. Under the program, it is possible to implement various types of investments:

<sup>9</sup> Ministerstwo Klimatu i Środowiska, *Krajowy Plan w dziedzinie Energii i Klimatu*, <<https://www.gov.pl/web/klimat/krajowy-plan-na-rzecz-energii-i-klimatu>>, access 18.08.2025

<sup>10</sup> 2025, *Ustawa Prawo energetyczne*, Dz.U.2025.418 t.j.

- “Purchase and installation of new heat sources that meet the requirements of the Clean Air Program;
- insulation of building partitions.
- replacement of window and door frames.
- replacement of the central heating and hot water systems.
- installation of renewable energy sources (solar collectors and photovoltaic systems);
- installation of mechanical ventilation with heat recovery”.<sup>11</sup>

| European Union                                                                                                                                                                                                                                                                                             | Poland                                                                                                                                                                                                                                                                              |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>European Green Deal (2019)</b> – EU growth strategy aiming for climate neutrality by 2050; covers all sectors (energy, transport, agriculture, industry, finance). Core pillars: climate neutrality, circular economy, clean industry, healthy environment, sustainable farming, and a just transition. | <b>Energy Policy of Poland</b> until 2040 (PEP2040) – national energy strategy ensuring security of supply, promoting renewable and zero-emission sources (offshore wind, nuclear). Targets >50% zero-emission installed capacity by 2040.                                          |
| <b>Fit for 55</b> package (2021) – EU climate legislation to cut emissions by at least 55% by 2030. Includes EU ETS reform and new emissions trading for buildings and road transport.                                                                                                                     | <b>National Energy and Climate Plan (NECP/KPEiK)</b> – updated every 5 years, covering decarbonisation, energy efficiency, security, internal market integration, and innovation.                                                                                                   |
| <b>Energy Performance of Buildings Directive (EPBD, recast 2024/1275)</b> – stronger efficiency standards; zero-emission public buildings from 2028 and all new buildings from 2030; mandatory GWP disclosure; renovation passports; ban on subsidies for fossil-fuel boilers from 2025.                   | <b>National Building Renovation Plan (KPRB)</b> – sets long-term renovation trajectory for residential and non-residential buildings to 2050.<br><b>Clean Air Programme</b> – subsidies and loans for thermal retrofits and replacement of heating systems in single-family houses. |
| <b>Regulation (EU) 2020/741</b> on minimum requirements for water reuse – promotes safe reuse of treated wastewater to reduce pressure on resources.                                                                                                                                                       | <b>Construction Law &amp; Energy Law Acts</b> – regulate design, construction, maintenance, and demolition of buildings; energy enterprises; CO <sub>2</sub> transport and storage; national energy market operation.                                                               |
| <b>Circular economy policies</b> – e.g. EU C&D Waste Management Protocol (2024 update) requiring selective demolition, material passports, and recycling quality assurance.                                                                                                                                | <b>Poland's Circular Economy Country Profile (EEA, 2024)</b> – national priorities: secondary raw material markets, eco-innovation in construction, stronger municipal–industry cooperation.                                                                                        |

<sup>11</sup> Program Czyste Powietrze, <<https://www.czyste-powietrze.org/program/>> access 26.08.25

|                                                                                                                                                          |                                                                                                                                      |
|----------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------|
| <b>EU financial support tools</b> – targeted incentives for vulnerable households and energy-poor groups, one-stop-shops for building renovation advice. | <b>National financial schemes</b> – e.g. Clean Air subsidies, tax reliefs, and regional renovation funds aligned with EU directives. |
|----------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------|

The comparison highlights that EU initiatives establish the overarching strategic and regulatory framework for the energy transition, setting binding targets for climate neutrality, building performance, circular economy practices, and water reuse. Poland, in turn, translates these obligations into national strategies, sectoral policies, and support programmes such as PEP2040, the National Energy and Climate Plan (NECP), the National Building Renovation Plan (KPRB), and the Clean Air Programme. While EU policies provide the direction and ambition, national measures focus on implementation, financing, and adapting to local conditions. This dual framework ensures alignment with EU climate goals, while also addressing Poland's specific challenges such as coal dependency, energy poverty, and the modernisation needs of its building stock.

## Market dynamics and key trends

Poland's construction cycle has been characterised by mixed signals. After a soft 2024, early-2025 data pointed to weaker permitting—building permits in Q1 2025 were down by about 21% year-on-year—while new housing starts held broadly stable, indicating near-term softness but a pipeline that can support activity as financing conditions normalise.<sup>12</sup> At the same time, cost pressures, though easing from their 2023 peak, continued to weigh on real activity through 2024, with sector output estimated to have contracted before a projected recovery in 2025–2028 on transport, residential and renewables investment.<sup>13</sup>

On the demand side, regulation remains the primary structural driver. The 2024 recast of the Energy Performance of Buildings Directive (EPBD 2024/1275) raises minimum performance requirements, phases in whole-life carbon (GWP) disclosure for new buildings (large new buildings first, then all new buildings) and requires national roadmaps towards future GWP limit values - measures that elevate the need for performance-assured renovation and carbon-aware design.<sup>14</sup> Labour-market indicators show a sector that has cooled from the 2022 peak but still faces recruitment frictions: Poland's construction job-vacancy rate was roughly 1.8% in Q1 2025, and EU vacancy rates in industry/construction remain above pre-pandemic norms.

Concurrently, digitalisation is reshaping process efficiency and compliance. The progressive roll-out of electronic permitting/records and the staged adoption of BIM in public procurement (ISO 19650

<sup>12</sup> Kozierekiewicz P., 2025, *2025 Begins Cautiously: Fewer Building Permits, Stable Number of New Housing Projects* <  
<https://polandinsight.com/2025-begins-cautiously-fewer-building-permits-stable-number-of-new-housing-projects-15843/>> access: 25.09.2025

<sup>13</sup> 2025, *Poland Construction Market Size, Trends, and Forecasts by Sector - Commercial, Industrial, Infrastructure, Energy and Utilities, Institutional and Residential Market Analysis to 2029 (Q2 2025)*

<sup>14</sup> 2025, *ANNEX to the COMMUNICATION TO THE COMMISSION Approval of the content of the draft Commission Notice providing guidance on new or substantially modified provisions of the recast Energy Performance of Buildings Directive (EU) 2024/1275*

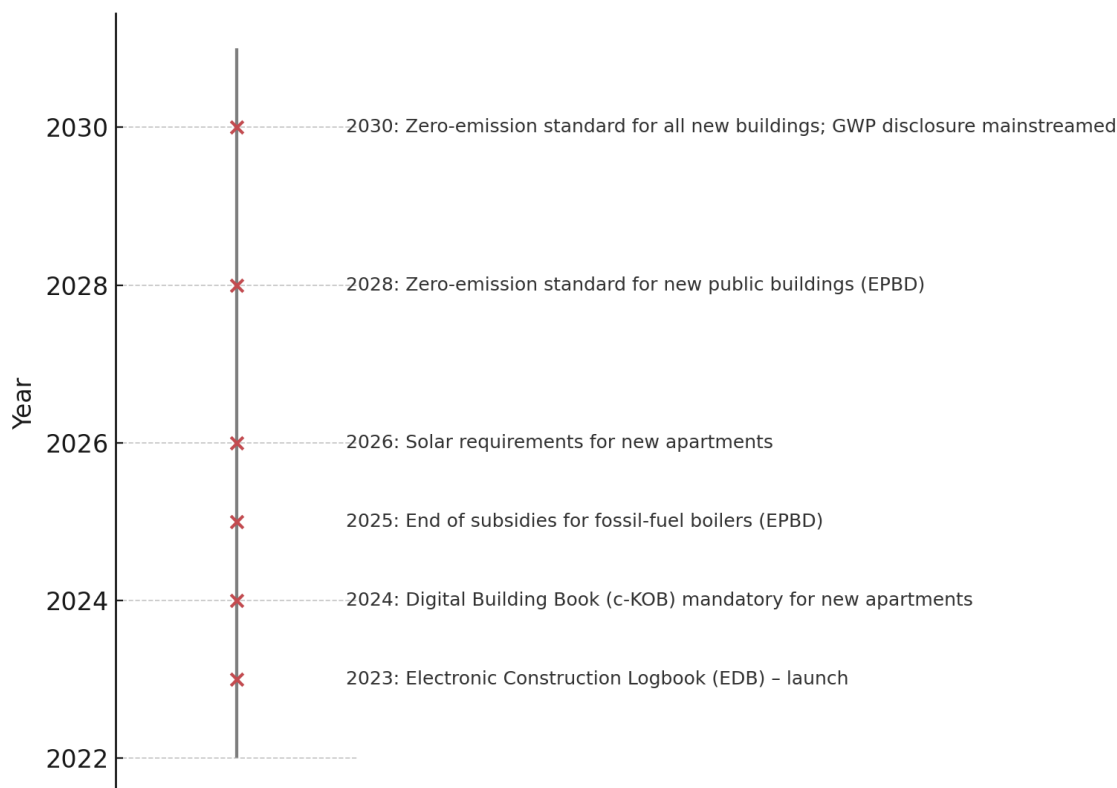
principles) are moving digital workflows from optional to expected, tightening interfaces between design, site execution and handover, and reinforcing quality-assurance requirements across the project lifecycle.

## Impact of Green and Digital Transitions on the Broader Construction Sector

The combined effect of the green and digital transitions is reshaping the entire construction ecosystem in Poland and across the European Union. On the environmental side, the recast Energy Performance of Buildings Directive (EPBD 2024/1275) and the *Fit for 55* package create binding obligations that accelerate deep renovation, mainstream low-carbon technologies, and require whole-life carbon assessment in both new and existing buildings. These measures not only elevate performance standards, but also expand the scope of compliance, pushing the sector toward energy-efficient, circular, and climate-neutral practices. For firms, this means that investments in skills, quality assurance, and sustainable supply chains are no longer optional but prerequisites for market competitiveness.

Simultaneously, the digital transition is transforming how construction projects are planned, managed, and delivered. The roll-out of *e-Budownictwo*, the Electronic Construction Logbook (EDB), and the digital building book (*c-KOB*) embeds digital workflows in regulatory compliance, while the staged introduction of Building Information Modelling (BIM) into public procurement redefines collaboration across the value chain. Digital tools—ranging from 4D/5D BIM planning and scan-to-BIM technologies to field quality-assurance applications—are enhancing efficiency, transparency, and accountability. At the same time, they require the creation of new roles and hybrid competences that combine traditional craftsmanship with advanced data management.

For the broader construction sector, these dual transitions imply both opportunity and risk. Companies that adapt early by investing in workforce upskilling, digital infrastructure, and sustainable business models are likely to secure a competitive advantage, benefit from EU and national funding streams, and position themselves in emerging markets for green renovation and circular materials. Conversely, firms that lag in adaptation risk exclusion from public procurement, declining productivity, and heightened vulnerability to regulatory penalties. In aggregate, the sector is entering a phase where environmental compliance and digital proficiency are not peripheral, but central determinants of resilience, growth, and long-term profitability.



## Currently needed qualifications and future jobs

Evidence from European and national sources converges on persistent shortages across core construction trades (e.g., bricklayers; concrete and reinforcement workers; roofers; carpenters; HVAC/RES installers), with Poland listed among Member States where “building and related trades workers (excluding electricians)” remain in structural deficit and multiple regions signalling shortages for 2025.<sup>15</sup> In parallel, EPBD implementation and growing client expectations are shifting competency profiles toward: (i) high-performance envelope execution (airtightness, thermal-bridge mitigation, moisture-safe insulation; QA protocols including blower-door testing and commissioning), (ii) low-carbon building services (heat pumps, balanced MVHR, low-temperature hydronics, PV integration and smart controls), and (iii) compliance-grade documentation and verification aligned with energy and carbon rules.

Digital skills are now foundational across roles. The most acute gaps include BIM modelling and coordination (clash detection), 4D/5D planning, scan-to-BIM and drone-based as-built capture, field QA apps, and clean e-submission workflows; these are critical to delivering both EPBD-compliant performance and auditable, efficient project management. Looking forward, the job mix will increasingly feature hybrid technical-digital profiles such as: BIM/VDC coordinator, site digital QA lead, energy modeller, LCA/GWP analyst, heat-pump and RES commissioning technician, and selective-demolition & materials-recovery supervisor (supporting circular-economy requirements and quality-assured secondary materials flows).

<sup>15</sup> European Labour Authority, 2024, *Report on labour shortages and surpluses* <[https://145725293.fs1.hubspotusercontent-eu1.net/hubfs/145725293/EURES\\_Report\\_on\\_labour\\_shortages\\_and\\_surpluses\\_2024.pdf](https://145725293.fs1.hubspotusercontent-eu1.net/hubfs/145725293/EURES_Report_on_labour_shortages_and_surpluses_2024.pdf)> access:25.09.2025

Policy and market signals suggest sustained demand for these roles as permitting pipelines convert to starts, funding for energy transition accelerates, and carbon-reporting obligations become mainstream practice.<sup>16</sup>

- **Thematic Analysis of State-of-the-Art**

- **Digitalisation in Construction (Housing 4.0)**

- Key Digital Technologies (e.g., Building Information Modelling (BIM), Digital Twins, Artificial Intelligence (AI) for energy management, Internet of Things (IoT) in buildings)
- Adoption and Impact in Construction Processes and Building Operation
- Current qualifications and emerging job profiles
- Relevant market trends shaping the demand and supply

Digitalisation in the construction industry is one of the key directions for the transformation of the sector. Implementing digital solutions at every stage (from design to construction) can help:

- reducing costs,
- increasing energy and operational efficiency,
- improving the quality and safety of construction work,
- monitoring of emissions and the environmental footprint of buildings.

In Poland, the digitalisation of the sector is still at an early stage, but there is growing interest, especially in large infrastructure projects and renovations funded by EU funds.

**BIM** – BIM technology is widely known, also in Poland, but implemented mainly in large design companies and for public contracts. In residential construction, it is used less frequently, mainly in premium projects. The main barriers to using BIM include the problem of interoperability between systems and linking their data, as well as the shortage of BIM specialists. It is worth noting that during 'learning' phase of this methodology, the time taken to complete project can be up to 50% more than with traditional design, which can demotivate some companies<sup>17</sup>. Since 2022, the Polish Ministry of Development and Technology has been working to promote the BIM methodology among participants in the investment and construction process and representatives of the construction industry. This is being enforced through projects to digitize construction processes, where BIM documents, standards and templates are being prepared and processes identified where BIM technology can be used. A BIM working group has been established to develop strategies for implementing BIM.<sup>18</sup>

<sup>16</sup> Kozierekiewicz P., 2025, *2025 Begins Cautiously: Fewer Building Permits, Stable Number of New Housing Projects*

<sup>17</sup> Kosiedowski W., Wirkus M., 2021, *Bariery i ograniczenia wdrażania technologii BIM – wyniki badań pilotażowych*, Builder Science

<sup>18</sup> Szuszman E., 2022, *BIM w Polsce*, Ministerstwo Rozwoju i Technologii

**Digital Twins** – Digital twin technology is still relatively new concept in the Polish construction sector. It is mainly applied in pilot projects in commercial and office buildings, where it is used to monitor energy consumption, optimize HVAC systems, and improve facility management. In residential construction, adoption remains limited and mostly associated with innovative or premium developments. The main barriers include high implementation costs, lack of interoperability between software platforms, and the shortage of qualified specialists who can manage and analyze real-time data. Despite these challenges, the potential of digital twins is significant: they enable predictive maintenance, improve energy efficiency, and provide accurate simulations of building performance throughout the life cycle. With the growing importance of ESG reporting and life cycle assessment (LCA) in line with EU regulations, digital twin solutions are expected to gradually expand in Poland, particularly in large-scale housing estates and public housing projects supported by EU funds. Researchers from the Institute of Geodesy and Geoinformatics at Wrocław University of Life Science are working on the project related to digital twin – “Utilisation of urban digital twins to co-create flexible positive energy systems for districts”. “It aim is not only to develop the technology, but also to put it into practice using interactive tools and information sharing platforms (...) that will help prepare communities to the implementation of Positive Energy Districts (PEDs) and enable the to co-create PEDs in their neighbourhoods”.<sup>19</sup>

**IoT** – IoT solutions are increasingly used in residential construction in Poland, although adoption is still limited compared to Western Europe. Smart meters, air quality sensors, lighting and heating control systems, and basic home automation devices are the most common applications. Their use is concentrated mainly in newly built housing estates in larger cities and in projects marketed as “smart homes.” The main barriers to wider adoption are the high cost of advanced IoT systems, the lack of interoperability between devices from different manufacturers, and low awareness among small and medium-sized developers. Nevertheless, rising energy prices and growing consumer demand for energy-efficient and comfortable housing are expected to accelerate the implementation of IoT technologies in the residential sector. The Ministry of Digitalisation’s 2019 document presents a forecast of digital transformation adaptation in Poland compared to Central and Eastern Europe, as shown in Figure 1. “In the coming years, the market for IoT technologies and solutions is expected to grow at a high rate (approx. 13% year on year). This means that the Polish economy has great chances of absorbing this technology – removing the pertinent obstacles may only increase this potential. Removing the existing barriers concerning regulatory issues and the development of new communication technologies (including 5G) will result in the dynamic development of IoT in Poland”.<sup>20</sup>

<sup>19</sup> Uniwersytet Przyrodniczy we Wrocławiu, 2024, *Cyfrowy bliźniak pomoże w transformacji energetycznej miast*,  
<<https://upwr.edu.pl/aktualnosci/cyfrowy-blizniak-pomoze-w-transformacji-energetycznej-miast-4257.html>>

<sup>20</sup> Maśniak L., Marcisz K and others, 2019, *IoT and the Polish Economy*, Report of the working group for the Internet of Things at the ministry of digital affairs

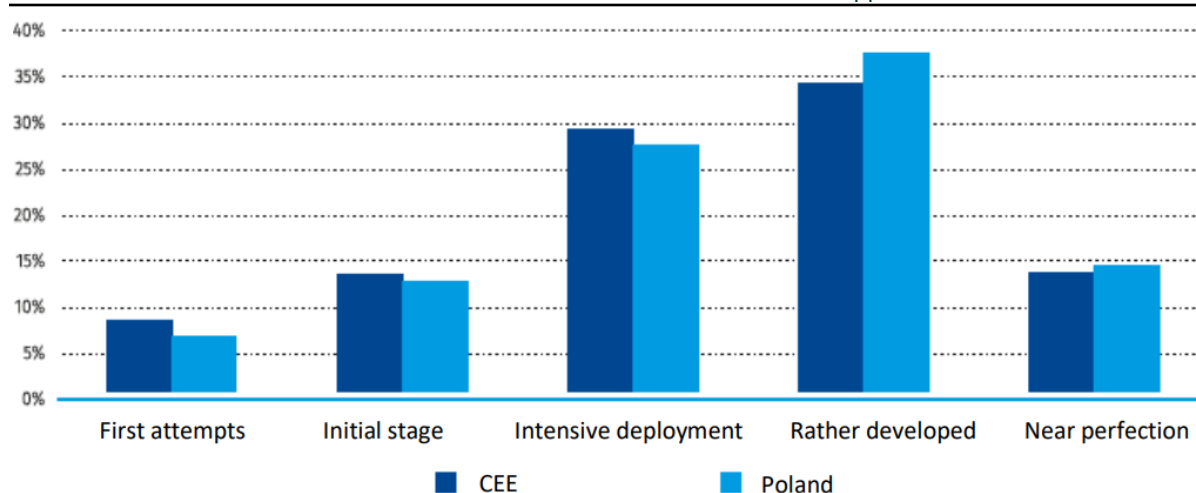


Figure 1. Declared level of adaptation of Digital Transformation solutions in Poland compared to Central and Eastern Europe<sup>21</sup>

**BMS** – Building Management Systems are most common in the commercial and office building sector. In the residential, multi-family building sector, BMS solutions are only gradually entering the market. The main role is to integrate, automate and monitor technical systems (heating, air conditioning, ventilation, lightning, security systems or photovoltaic panels). There are many tools and technologies, they should be suited to the need and circumstances. For example in Warsaw in one of the residents' associations (Wrzeciono 17) the SCADA system was implemented for monitoring, collecting and analyzing data. Such example was presented on the photo below (figure 2). Monitoring cameras were installed in order to observe the condition of the photovoltaics on the roof of the building. The association used management systems to plan and check the profitability and best location of the panels. For a year before installing PV they've monitored the roof to check how the shadows would act in the daily and yearly cycle. BMS systems can be helpful in many situations, even when the energy operator wants to force the purchase of unnecessary heat by increasing its temperature.

<sup>21</sup> IDC CEE Digital Transformation Survey, 2017; n=311



Figure 2. SCADA system monitoring photovoltaics on the roof

**3D scanning, drones and robotics** – 3D scanning, drones, and robotics represent another group of emerging technologies that are reshaping construction processes worldwide. 3D laser scanning allows for precise digital mapping of existing buildings and construction sites, improving the accuracy of renovation planning and progress monitoring. Drones equipped with cameras and sensors are increasingly used for surveying, safety inspections, and construction site supervision, enabling cost reductions and better control of project timelines. Robotics, meanwhile, holds promise for automating repetitive or dangerous tasks such as bricklaying, concrete printing, or prefabrication assembly.

In Poland, these technologies are being introduced gradually, with their use concentrated in larger companies and research projects. Drones are already being employed by developers for site inspections and by municipalities for urban planning and monitoring illegal construction. 3D scanning is mainly applied in renovation projects, particularly in heritage buildings, where precise digital documentation is required. Robotics remains at the pilot stage, with limited use in prefabrication plants and experimental applications in automated construction. Barriers to wider adoption include high equipment and training costs, legal issues related to drone operations, and the generally conservative nature of the construction sector. Nevertheless, as prefabrication and modular housing become more popular in Poland, and as EU funding supports digital and ecological transformation, the role of these technologies is expected to expand significantly.

**AI & data analysis** – Artificial intelligence (AI) and data analysis are becoming increasingly important tools in the global construction sector, offering opportunities to improve design processes, optimise energy use, and predict maintenance needs. These technologies support more efficient resource management by

using algorithms to simulate scenarios, analyse building performance data, and identify patterns that humans might overlook. Applications already include predictive modelling for energy consumption, optimisation of HVAC systems, risk assessment in construction project management, and automated quality control using image recognition.

In the Polish context, AI and advanced data analytics are still at an early stage of adoption. Their use is more common in pilot projects, often linked with research institutions or in collaboration with larger developers on commercial and public buildings. In residential construction, practical applications remain limited, mainly due to cost barriers, lack of structured data, and a shortage of specialists with combined knowledge of construction engineering and data science. However, the increasing requirements for ESG reporting and life cycle assessments (LCA) under EU regulations are expected to accelerate adoption. With growing pressure to monitor and reduce the carbon footprint of buildings, AI-driven solutions for data processing and reporting could soon become a standard, particularly in larger housing estates and public projects supported by EU funds.

**Game “Estate with Climate”** – “the game was created so that estate residents could take matters into their own hands and decide how to adapt their places of residence to climate change. The game was developed as part of the Co-Adapt Project – ‘Communities for Climate Change Action’, ‘Communities for Climate Change Adaptation Action’.”<sup>22</sup> It is a serious simulation game, which serves as an innovative tool to engage urban residents in designing and implementing climate adaptation measures for their housing estates. Players can select from 40 nature-based solutions, such as rain gardens, absorption basins, climbing plants, trees, and flower meadows, then simulate their effects using embedded algorithms: assessing reductions in air temperature, improved air quality, rainwater retention, contributions to biodiversity, and cost-effectiveness. The game functions with both board and electronic versions and is freely available online. Players enter their postal code, and the game renders their estate as a 3D model, allowing them to test and visualize the impact of adaptive interventions like planting trees, replacing paved surfaces with permeable materials, or installing rainwater storage systems. The advantage of such game is availability and ability to engage and involve people of all ages.

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<sup>22</sup> Szkoła Główna Gospodarstwa Wiejskiego, *Osiedle z Klimatem*, <<https://osiedlezklimatem.sggw.edu.pl/?lang=en>>, access 21.08.2025



Figure 3. Game "Estate with Climate"

Digitalisation and the development of new technologies are becoming one of the key directions of transformation in the construction sector in Europe and in Poland. The adoption of innovative solutions such as BIM, digital twins, IoT, artificial intelligence and robotics affects not only the way projects are designed and implemented, but also energy efficiency, environmental sustainability, and the overall competitiveness of the sector. These trends are reshaping the labour market by requiring new skills, while at the same time creating opportunities to improve building quality, reduce operational costs, and meet the growing regulatory requirements of the European Union.

The digitalisation of construction is an important aspect that will pay off in the future and will be necessary, the implementation phase is crucial in this case, the learning process of the technology will be demanding and in the first months the working time will not necessarily be shorter than traditionally and the costs do not have to be lower. Stakeholders and beneficiaries should be supported in further joint development, especially in the most difficult stages.

Some of the advantages of implementation new technologies and methodologies are:

- Cost-effectiveness
- Quality assurance and on-time delivery
- Improving communication and collaboration
- Project optimization
- Sustainability and life-cycle analysis

The main challenges are, for example, financial, technological and legal barriers, cyber security aspects, contracting authority requirements and cultural barriers.

In today's fast-paced world, the job market and requirements will change. Some jobs may not exist in the near future, but new technologies and methodologies also create new jobs. Due to the technological development (as well as the green transition and changing EU policy) in the construction sector, there will be an increasing demand for specialists:

- BIM Coordinator / BIM Manager
- Digital Twin Engineer
- LCA/EPD Specialist
- Circular Economy Advisor
- Smart Building Systems Technician
- Renewable Energy Systems Designer/Installer
- Data Analyst

These emerging profiles illustrate how the construction sector is shifting towards a model that combines digital expertise with sustainable practices. They require not only technical skills in advanced software, data analysis, and renewable energy systems, but also interdisciplinary knowledge that connects engineering, environmental science, and project management. As the industry adapts to stricter EU regulations and investor expectations linked to ESG reporting, the demand for such specialists will continue to grow. This evolution highlights the importance of vocational education and training systems that can provide flexible pathways, including micro-credentials and lifelong learning opportunities, to equip the workforce with the necessary competences for the green and digital transition.

In Poland there is a tool called Sectoral Qualifications Framework (pl. Sektorowa Rama Kwalifikacji), it helps to systematize qualifications in various sectors and links them with Polish Qualifications Framework (PRK).

“It makes it easier to understand what skills and knowledge employees should have at different levels – from simple auxiliary tasks to advanced management of construction projects. (...) The main goal of the SRK update in Construction was to take into account the growing role of green and digital qualifications in construction. This is a response to the challenges of the European Green Deal, the National Recovery Plan, the Just Transition Fund, and the "Fit for 55" package. The construction industry has a huge impact on the environment, which is why it is necessary to prepare personnel to work in a more ecological, efficient, and responsible way. Green competences are cross-sectional and interdisciplinary in nature, encompassing technological aspects (e.g., renewable energy sources, circular economy), organizational aspects (e.g., sustainable project management), and social aspects (e.g., environmental education, social participation). Their effective implementation requires precise definition and assignment to specific sectors of the economy, which is made possible by sectoral qualifications frameworks.”<sup>23</sup>

There are many factors that influence the market and shape its development. Legal regulations, technical development, consumers and changing demands – all this has a great effect on present and future situation in this sector.

<sup>23</sup> Zintegrowany System Kwalifikacji, Zielone kompetencje w budownictwie – aktualizacja SRK w Budownictwie, <<https://kwalifikacje.edu.pl/zielone-kompetencje-w-budownictwie-aktualizacja-srk-w-budownictwie/>> access 22.08.2025

## Polish ways of digitalisation

In recent years Poland has significantly expanded its portfolio of digital tools and registries to increase transparency, streamline administrative procedures, and improve the quality and safety of the built environment. These instruments are aligned with the objectives of the national *Building Information Modelling (BIM) Roadmap* as well as with the broader digitalisation agenda promoted by the European Union.

- **e-Budownictwo** – the official government platform (operated by the General Office of Construction Supervision) that enables online submission of construction-related applications and forms. It replaces traditional paper-based workflows and provides citizens, designers, and contractors with a single digital entry point.
- **SOPAB (System Obsługi Postępowań Administracyjnych w Budownictwie)** – the System for Handling Administrative Proceedings in Construction. It supports public authorities in managing building permits and related procedures electronically, ensuring consistency of decisions and reducing processing times.
- **Registers of Mandatory Inspections and Construction Disasters** – national registries that record compulsory building inspections and document serious construction incidents. They improve monitoring, transparency, and enforcement of safety regulations.
- **Central Register of Persons Holding Construction Licences** – introduced in 2023, this database contains official records of engineers and professionals authorised to perform independent technical functions in construction. It increases labour-market transparency and facilitates verification of qualifications.
- **Elektroniczny Dziennik Budowy (EDB, Electronic Construction Logbook)** – launched in 2023, this digital site diary replaces paper-based logs. It allows contractors, supervisors, and inspectors to record construction progress, decisions, and approvals in real time.
- **Cyfrowa Książka Obiektu Budowlanego (c-KOB, Digital Building Book)** – mandatory for new buildings since 2024, this digital record contains comprehensive documentation of a building's maintenance, upgrades, and inspections across its life cycle.

Together, these tools mark a decisive step toward a fully digital construction administration in Poland. They reduce paperwork and administrative burdens, ensure greater regulatory compliance, and provide reliable datasets for quality assurance and safety monitoring. In the longer term, they also prepare the sector for integration with BIM environments and for EU requirements on energy and carbon performance reporting.

| Tool / Registry                                       | Technology / Functionality                                                                             | Implementation status in Poland                                                              | Potential for further development                                                                                      |
|-------------------------------------------------------|--------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------|
| <b>e-Budownictwo (national e-construction portal)</b> | Online platform for electronic submission of forms and applications; integrated with public registers. | Fully operational; widely used by citizens and firms for building permits and notifications. | Expansion of services (integration with BIM models and EU databases); user-friendly interface and mobile applications. |
| <b>SOPAB (System for Handling)</b>                    | Case management system for public authorities;                                                         | Deployed in public administration; gradually                                                 | Potential to integrate with regional/local planning                                                                    |

|                                                                        |                                                                                                              |                                                                            |                                                                                                    |
|------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------|
| <b>Administrative Proceedings in Construction)</b>                     | supports digital workflows in building permit procedures.                                                    | replacing paper-based workflows.                                           | systems and EU-level permitting standards; AI-based document checking.                             |
| <b>Registers of Mandatory Inspections &amp; Construction Disasters</b> | Centralised digital databases for recording compulsory building inspections and reporting serious incidents. | Functional; improving oversight and transparency.                          | Development of predictive analytics, linking with IoT sensors and risk-monitoring platforms        |
| <b>Central Register of Persons Holding Construction Licences</b>       | Online register of certified professionals; searchable by public and authorities.                            | Operational since 2023; improves verification of qualifications.           | Could integrate with EU recognition of professional qualifications, digital ID cards for engineers |
| <b>EDB (Electronic Construction Logbook)</b>                           | Cloud-based platform for recording daily site activities, progress, and approvals.                           | Introduced in 2023; adoption increasing among contractors and supervisors. | Integration with BIM workflows, mobile QA apps, and automated reporting.                           |
| <b>c-KOB (Digital Building Book)</b>                                   | Digital life-cycle record of building maintenance, inspections, and upgrades.                                | Mandatory for new buildings since 2024; early stage of use                 | Linking with LCA/GWP databases, smart-building sensors, and EU renovation passports.               |

Poland has already built a solid foundation of digital registries and administrative tools. The current challenge lies less in launching new systems than in ensuring interoperability, user uptake, and integration with BIM, smart-building technologies, and EU-wide platforms (e.g. for renovation passports, carbon reporting, or cross-border recognition of licences).

## Market trends shaping demand

The Polish construction market is currently shaped by the combined effects of cyclical fluctuations and structural transformations linked to the green and digital transitions. Following a contraction in completions during 2024, forward-looking indicators such as building permits and housing starts point to a renewed pipeline of projects that will sustain activity in the coming years. This outlook is reinforced by the availability of EU recovery funding, national renovation programmes such as the *Clean Air Programme*, and investments in infrastructure. At the same time, cost pressures and financing constraints continue to weigh on short-term demand, particularly in the residential segment.

The green transition is emerging as a primary driver of demand. The recast *Energy Performance of Buildings Directive* (EPBD 2024/1275) introduces binding requirements for zero-emission new buildings, progressive renovation standards, and mandatory disclosure of whole-life carbon. For Poland, this creates a sustained need for deep energy renovations, low-carbon building services such as heat pumps, balanced ventilation systems and photovoltaic installations, as well as robust quality assurance practices including blower-door testing and commissioning. In combination with national strategies such as the *KPRB* and *PEP2040*, these regulatory requirements are expected to generate long-term growth in both the renovation and new construction markets.

In parallel, digitalisation is reshaping both administrative procedures and project delivery models. The introduction of platforms such as *e-Budownictwo*, *SOPAB*, the *Electronic Construction Logbook (EDB)*, and the *Digital Building Book (c-KOB)* has firmly embedded digital workflows into regulatory compliance. Moreover, the phased integration of Building Information Modelling (BIM) into public procurement is accelerating the adoption of integrated, data-driven project management practices. This transition creates rising demand for advanced roles such as BIM coordinators, digital QA specialists and data managers, but it also requires baseline digital literacy among site crews, office staff and supervisory personnel.

Labour market dynamics further amplify these pressures. Persistent shortages in core construction trades—such as bricklayers, reinforcement workers, roofers and HVAC/RES installers—coexist with growing demand for hybrid profiles that combine traditional craftsmanship with environmental and digital competences. Vacancy rates remain above pre-pandemic levels, underlining the structural imbalance between labour supply and the needs of a sector undergoing simultaneous decarbonisation and digital transformation.

Taken together, these trends point to both risks and opportunities. Firms that are able to invest in workforce upskilling, digital infrastructure and low-carbon solutions are likely to benefit from preferential access to public procurement, EU and national support mechanisms, and expanding demand for sustainable housing and infrastructure. In particular, enterprises specialising in deep renovation, renewable energy integration, BIM-enabled project delivery and circular-economy practices—such as selective demolition and the reuse of secondary materials—are well positioned to capture the benefits of the current transformation.

#### o Circular Economy & Sustainable Construction Materials

- Principles and Practices (e.g., reuse, recycling, waste management strategies)
- Sustainable Materials and their Application in Buildings
- Current qualifications and emerging job profiles
- Relevant market trends shaping the demand and supply

In Poland, the building sector is responsible for a large share of energy consumption and material use, while renovation and demolition activities generate a significant volume of construction waste. Sustainable materials, such as low-carbon concrete, cross-laminated timber (CLT), recycled aggregates, or bio-based insulation are increasingly recognised as viable alternatives to conventional, high-emission products. Their integration into housing projects not only reduces the environmental footprint but also creates demand for new competencies in design, installation, and material certification. The project also emphasises the adoption of design-for-disassembly approaches, material passports, and selective demolition practices, which make future reuse and recycling possible. These circular practices are still at an early stage in Poland, where the construction market remains cost-driven and fragmented, so there is a lot room for improvement.

**Water recovery** – Water efficiency is a critical aspect of circular housing. Greywater recycling systems, rainwater harvesting, water recovery from wastewater, and green infrastructure such as retention basins or green roofs help to reduce potable water use and mitigate climate risks like drought or urban flooding. In the Polish context, these solutions are still not widely applied in residential construction, but they offer high potential for sustainable housing estates. It can be assumed that the increase of public awareness and decrease of deepwater resources will contribute to greater interest in water recovery. Especially considering the fact that there is a visible increase in water and sewage fees in Polish cities.

#### Wastewater

“Due to the increase in water consumption in households and industry, the amount of wastewater is constantly growing. High costs of water transportation, as well as new environmental problems, such as growing water shortages, make the topic of water recovery and reuse, as well as wastewater recycling, increasingly important”.<sup>24</sup>

Warsaw Waterworks and the City Sewage Management Board (ZOM) have signed an agreement to ensure the use of water recovered from sewage. For this purpose, the potential and possibilities of using such water in urban space should be assessed. The recovered water will be assessed as part of the ReNutriWater project, which is funded by the EU's Interreg Baltic Sea Region program. Reclaimed water can be used for maintaining cleanliness in cities (cleaning streets and sidewalks), in urban agriculture (watering urban greenery), and in industry. As a result, the use of drinking water, i.e. treated water, for cleaning and economic purposes should be reduced, and the capital city of Poland will gain a modern and sustainable tool for maintaining cleanliness and the environment.<sup>25</sup>

#### Greywater

Greywater, which includes relatively clean wastewater from sources such as showers, sinks, and washing machines, represents a significant opportunity within the framework of the circular economy. Its treatment and reuse can substantially reduce the demand for potable water in households, particularly for non-potable uses like toilet flushing, garden irrigation, or cleaning. In circular housing systems, greywater recycling not only conserves water but also reduces the volume of wastewater requiring treatment, lowering energy use and operational costs in centralized sewage systems.

In Poland, however, the implementation of greywater systems in residential buildings remains limited and there are few challenges to overcome. The primary barriers include lack of clear legal frameworks, low public awareness, and relatively low water prices, which reduce the economic incentive for investment in such technologies. Despite these challenges, pilot projects and increasing interest from municipalities and developers indicate a growing recognition of greywater's potential, especially in the context of rising water stress and the need for more sustainable urban infrastructure.

An example of such a water recovery solution is the Aqua Park in Międzyzdroje. Green Water Solutions, a company specializing in water recovery technologies (grey water recycling and rainwater recovery), helped launch the modern GreenLife installation at the facility. The system operates at a capacity of 11m<sup>3</sup> per day

<sup>24</sup> VEOLIA, *Ponowne wykorzystanie wody*,  
<<https://www.veoliawatertechnologies.pl/oferta/zastosowania/odzysk>> access 26.08.2025

<sup>25</sup> Wodociągi Warszawskie, 2025, Wodociągi Warszawskie i Zarząd Oczyszczania Miasta zbadają możliwość efektywnego dla miasta wykorzystania wody odzyskanej ze ścieków,  
<<https://www.mpwik.com.pl/view/wodocigi-warszawskie-i-zarzad-oczyszczania-miasta-zbadaj-mozliwosc-efektywnego-dla-miasta-wykorzystania-wody-odzyskanej-ze-sciekow&i=1315>>

and allows for the efficient recovery of grey water, mainly from showers, which after an advanced purification process is fed back into the system – it is used, among other things, to flush toilets in the facility.<sup>26</sup>

### Rainwater

Rainwater harvesting is one of the more widely recognized and accepted water-saving strategies within the circular economy framework, especially in residential and urban settings. It involves collecting, storing, and using rainwater. Typically from rooftops for non-potable purposes such as garden irrigation, toilet flushing, or cleaning surfaces. This not only reduces the demand for treated tap water but also helps manage stormwater runoff, mitigating the risk of urban flooding.

In Poland, rainwater harvesting is gaining traction, particularly in response to more frequent extreme weather events, including both droughts and intense rainfall. Local governments increasingly promote the installation of rainwater systems through subsidies and awareness campaigns. However, despite growing interest, the adoption rate in residential construction remains moderate. Barriers include limited integration into urban planning policies, lack of unified national regulations, and uneven financial support across regions. Still, compared to greywater systems, rainwater harvesting is more familiar to the public and often seen as a first step toward more comprehensive water reuse practices in Polish cities.

Rainwater has a high potential for use, also on a large scale. The Maerl hotel project in Kołobrzeg (scheduled to be completed by mid-2026) includes the installation of an advanced rainwater recovery system. Due to the size and modernity of the building, innovative solutions were chosen. The water recovery system is designed to efficiently collect rainwater from the entire roof surface of the facility, providing an ecological and economical source of technical water for purposes such as flushing toilets, watering plants, or washing external surfaces.<sup>27</sup>

In the case of Poland, it is important to develop a plan that takes into account the profitability of the projects. Reclaimed water is often used for irrigation, and in Poland, the average demand for irrigation water is relatively low compared to the rest of Europe.

<sup>26</sup> Green Water Solutions, Uruchomienie systemu odzysku wody szarej w Aqua Park Międzyzdroje, <<https://www.greenwatersolutions.pl/aktualnosci/uruchomienie-systemu-odzysku-wody-szarej-w-aqua-park-miedzyzdroje/>> access 29.08.25

<sup>27</sup> Green Water Solutions, Zaawansowany projekt systemu odzysku wody deszczowej w hotelu Maerl w Kołobrzegu, <<https://www.greenwatersolutions.pl/aktualnosci/zaawansowany-projekt-systemu-odzysku-wody-deszczowej-w-hotelu-maerl-w-kolobrzegu/>> access 29.08.25

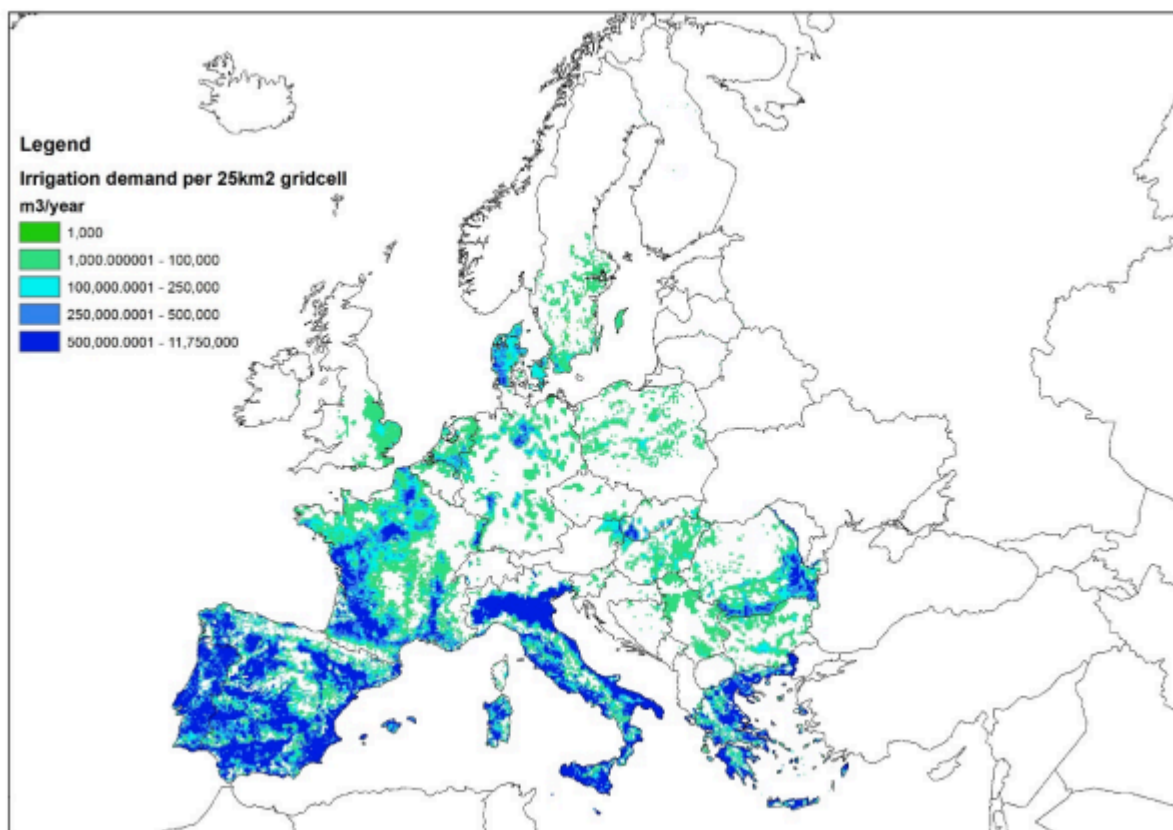


Figure 4. Average water demand for irrigation, calculated using EPIC<sup>28</sup>

Given this, on June 22, 2023, the Minister of Infrastructure issued a decision to exclude the country's area from the application of Regulation (EU) 2020/741 of the European Parliament and of the Council of May 25, 2020, on minimum requirements for water reuse. According to the decision, the reuse of water for irrigation in agriculture will not be used in the areas of nine river basins in Poland. The reason was the criterion of profitability, taking into account all costs, both environmental and resource costs; it was shown that alternative solutions would be more optimal in this case.<sup>29</sup>

Water reuse solutions such as rainwater harvesting, greywater recycling, and wastewater recovery align strongly with the principles of the circular economy and offer tangible benefits for sustainable urban development. While their implementation in Poland remains limited, growing environmental pressures and rising water costs may drive wider adoption in the future. Strategic planning, supportive regulation, and increased public awareness will be key to unlocking their full potential.

**Waste heat** – In residential construction, waste heat recovery is an increasingly important circular solution. Technologies such as mechanical ventilation with heat recovery (MVHR), wastewater heat

<sup>28</sup> Pistocchi, A., Aloe, A., Dorati, C., Sanz, L. A., Bouraoui, F., Gawlik, B., Grizzetti, B., Pastori, M., Vigliak, O. (2017) *The potential of water reuse for agricultural irrigation in the EU: a hydro-economic analysis*, Publications Office of the European Union, Luxembourg, Joint Research Centre, EUR 28980 EN <https://publications.jrc.ec.europa.eu/repository/handle/JRC109870>

<sup>29</sup> Decision of the Minister of Infrastructure of June 22, 2023, on excluding the country from the application of Regulation (EU) 2020/741 of the European Parliament and of the Council of May 25, 2020, on minimum requirements for water reuse

exchangers, or district systems that reuse excess heat from industry can significantly reduce energy demand in buildings. Integrating waste heat recovery into housing projects aligns with the EU's decarbonization goals and supports both cost savings for residents and emission reductions. Currently, the heat emitted by devices often goes into the atmosphere, where it is wasted. There are many places where such waste heat would be useful and could be recovered to heat other infrastructure elements. Such heat can be reintroduced into the cycle, reducing the need for production and thus reducing costs. It can be recovered from many infrastructure elements, but data centers, which work continuously generating large amounts of heat, deserve special attention.

“The data processing center sector, which is in a phase of dynamic development, has significant potential for using waste heat for heating purposes. Heat generated in server rooms is characterized by year-round availability and stable power. Using heat pump technology, its temperature parameters enable efficient supply to district heating systems, which significantly supports the implementation of decarbonization goals in the national energy sector, as well as the diversification of available waste heat sources.

In Poland, there is significant potential for heat recovery from data centers, which can play a key role in the energy transformation process and in the new model of heat market operation.

The use of heat recovery systems in Data Centers is a justified action both from the perspective of improving the energy efficiency of these facilities and compliance with the priorities of national and European climate policy.

Key advantages of recovering waste heat from the data processing process:

- large amounts of waste heat per unit and concentration in major urban agglomerations,
- estimated total waste heat potential: 19,700 TJ (2030),
- temperature of the heat pump's lower source in the range of 20-50°C,
- stable source of waste heat with a predictable annual profile,
- availability of the existing data center power connection for powering heat pumps.

Key challenges:

- r. location of the data center relative to existing district heating networks (connection costs),
- s. the scope of responsibility of individual members of the process (data center operator,
- technological limitations of heat pumps in terms of the ability to produce water with temperatures equal to the water supply temperature of high-temperature systems (>120°C) under the design conditions of the outdoor air temperature in winter,
- obligation to obtain a permit for thermal power > 5 MWt”.<sup>30</sup>

Unlocking the full potential of waste heat recovery particularly from data centers will require closer cooperation between stakeholders, infrastructure planning, and targeted investment. As both energy prices and climate ambitions rise, this circular solution may become a key component of Poland's sustainable energy transition.

**Technological disposal** – Construction and demolition waste represents one of the largest waste streams in Poland. Selective demolition, material sorting, and technological disposal techniques such as advanced crushing, separation, or upcycling of aggregates enable materials to re-enter the construction cycle. These practices help reduce landfill volumes and resource extraction, and they create new business models in the field of construction waste management.

<sup>30</sup> Polish Data Center Association, 2025, *Odzysk ciepła odpadowego z Centrów Przetwarzania Danych (CPD) wsparciem procesu dekarbonizacji polskich sieci ciepłowniczych*

**Sustainable materials** – Replacing conventional materials with low-emission and renewable alternatives is central to the transition. Examples include low-carbon concrete blends, cross-laminated timber (CLT), bio-based insulation (hemp, cellulose, wood fibre), and recycled steel or aluminium. Their use lowers embodied carbon and supports a market shift towards more climate-neutral construction. However, uptake in Poland is limited by higher costs, lack of awareness, and gaps in supply chains.

**LCA/EPD** – To evaluate sustainability, life cycle assessment is becoming a standard tool in EU housing policy. LCA allows stakeholders to measure not only operational energy use but also embodied emissions from materials, transport, and construction processes. Environmental Product Declarations (EPDs) provide transparent data on materials' performance, enabling architects, developers, and regulators to make evidence-based choices. Promoting these methodologies through projects like Excel4Housing ensures alignment with EU taxonomy and green financing requirements.

- **Cross-Cutting Analysis & Opportunities**

- Interlinkages and Synergies between the Thematic Areas
- Common Challenges and Barriers across Diverse European Regions (e.g., policy, financial, skills-related)
- Innovation Opportunities in VET for Sustainable Construction (identifying promising areas for intervention)

The three thematic areas analysed in this report—energy efficiency and climate-neutral housing, digitalisation of construction processes, and circular economy practices—are not isolated domains but interconnected dimensions of the same systemic transition. The recast Energy Performance of Buildings Directive (EPBD 2024/1275) demonstrates this interdependence clearly: it raises minimum energy performance standards, introduces renovation passports, requires whole-life carbon disclosure, and promotes material passports. As a result, green and digital transitions increasingly converge at the regulatory level, and their successful implementation demands the simultaneous development of competences across all three domains.

Digitalisation directly supports energy efficiency by enabling transparent monitoring, modelling, and verification of building performance through tools such as BIM, dynamic simulations, and electronic logbooks. Circular-economy principles are likewise inseparable from digital solutions, since selective demolition, reuse, and material quality assurance rely on traceability ensured by interoperable data systems. At the same time, energy efficiency and circularity complement one another: combining deep renovation with reuse of secondary resources reduces both energy demand and material waste, maximising climate benefits and lowering costs.

Despite these synergies, several persistent barriers remain across European regions. Regulatory fragmentation and uneven national implementation of EU directives create uncertainty for firms and training providers. Financial barriers, particularly the high upfront costs of deep renovation, selective demolition, and digital infrastructure, discourage investment—especially among SMEs with limited access to capital. Skills-related shortages represent perhaps the most structural obstacle: deficits in traditional

trades coexist with limited availability of advanced competences such as BIM coordination, LCA/GWP assessment, and digital quality assurance. Teacher capacity and training infrastructure remain insufficient to meet the pace of change.

These challenges also create opportunities for innovation in vocational education and training (VET). The emerging network of *Branżowe Centra Umiejętności* (Centres of Vocational Excellence) provides a platform for piloting integrated curricula that combine green and digital skills with transversal competences such as teamwork, health and safety, and ESG awareness. Practical laboratories and demonstration sites can be established to simulate real construction conditions, from airtightness testing to BIM clash detection and selective dismantling. Short, modular courses for adult learners can help to address immediate shortages while providing flexible pathways into new hybrid professions such as energy modeller, renewable energy commissioning technician, or circular-construction supervisor. Teacher secondments to industry and closer cooperation between training institutions, municipalities, and firms are essential to ensure that curricula remain aligned with technological developments and regulatory requirements. By pursuing these opportunities, Poland—and other EU Member States facing similar challenges—can reinforce resilience in the construction sector while accelerating progress toward EU climate and digitalisation goals.

- **Conclusions and Recommendations for WP4**

- Key Findings Summary (synthesis of the most important insights)
- Strategic Insights for Curriculum and Training Programme Design (direct recommendations for WP4)

The evidence collected across thematic areas demonstrates that the construction sector in Poland, as in the wider EU, is undergoing a dual transformation driven by green and digital imperatives. Regulatory frameworks such as the European Green Deal, the Fit for 55 package, and the recast EPBD set increasingly ambitious requirements for energy performance, carbon neutrality, and transparency across the building life cycle. Simultaneously, national reforms have introduced a comprehensive suite of digital tools, including e-Budownictwo, SOPAB, the Electronic Construction Logbook, and the Digital Building Book, embedding digital workflows into regulatory compliance. In parallel, labour-market shortages remain acute: deficits persist in traditional building trades while demand grows for hybrid roles that combine technical craftsmanship with digital and environmental competences. Circular-economy principles, embodied in the updated EU Construction and Demolition Waste Protocol and national profiles, are progressively entering mainstream practice, yet implementation is uneven and markets for secondary materials remain underdeveloped.

In light of these findings, the design of curricula and training programmes under WP4 should adopt an integrated and forward-looking perspective. Training content must combine green and digital competences rather than treating them as separate pathways. BIM-enabled design, energy modelling, and life-cycle assessment (LCA/GWP) should be embedded into core curricula alongside skills in airtightness, building services decarbonisation, and selective demolition. Practical learning environments must be established, including demonstration laboratories and pilot sites where learners can apply knowledge in conditions that mirror real construction challenges. Teacher training should include systematic

secondments to industry to ensure a continuous exchange of knowledge between practice and education. Adult learning programmes should be modular, allowing workers to reskill quickly in areas of high demand such as heat pump installation, drone-based as-built capture, and digital renovation passport management.

It is equally important that transversal competences—project management, teamwork, occupational health and safety, and ESG fundamentals—are integrated into all training pathways, as these are increasingly central to employer expectations and project delivery. The Centres of Vocational Excellence should be positioned as hubs for innovation, piloting new curricula, hosting digital and circular laboratories, and coordinating partnerships between schools, municipalities, and companies. Training standards developed under WP4 should also be aligned with EU-wide frameworks, enabling mobility of workers and mutual recognition of qualifications.

The future of the construction sector will belong to firms and workers capable of integrating technical, digital, and environmental skills. For WP4, this means creating a coherent and flexible training framework that addresses immediate labour-market shortages while preparing the workforce for a decarbonised, digitalised, and circular construction sector. In this way, the recommendations presented here will not only support the successful delivery of project objectives but also contribute to the long-term competitiveness and sustainability of the European construction industry.

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## Annex 8: State-of-the-Art National Report - Portugal



# REPORT ON THE STATE OF THE ART

Portugal

## ● Introduction

The state of the art in the construction sector in Portugal aims to provide a comprehensive analysis of sustainability and energy efficiency practices within the sector, focusing on the development of skills and the strengthening of the sector through training and qualification of the various actors involved.

This document, based on a review of relevant literature, analysis of case studies and best practices, review of methodologies, and consultations with stakeholders, aims to offer an overview of the sector, serving as a foundation for the development of new approaches, methodologies, tools, and resources aimed at the sustainable and innovative growth of this sector in the partner countries of the project.

## – Indicative outline

### ▪ Introduction

The construction industry stands as a cornerstone of economic activity, generating around 18 million direct jobs and accounting for approximately 9% of the European Union's (EU) gross domestic product (GDP). Its value chain spans a diverse array of activities, including the extraction of raw materials, the manufacture and distribution of construction products, as well as the design, construction, management, and supervision of building works. It also extends to the maintenance, renovation, and demolition of structures, along with the recycling of construction and demolition waste (EC, 2016).

To achieve carbon neutrality by 2050, the EU has launched a “Renovation Wave” aimed at enhancing energy performance. This initiative targets the renovation of 35 million buildings by 2030, with an annual renovation rate of 3% (EC, 2020; Thung et al., 2023).

This task, grounded in bibliographic research and analysis and focused on the Portuguese context, aims to identify and characterize the state of the art of the national construction sector. It also seeks to contribute to a broader analysis within the framework of the EXEL4HOUSING 4.0 project, supporting the development of methodologies, resources, and tools designed to strengthen the capacities of the project's target groups.

### ▪ General Context: European Construction Sector & Energy Transition

- Policy and Regulatory Landscape (e.g., EPBD, European Green Deal, Renovation Wave, EU Taxonomy relevant to construction)

When it comes to public policies related to the construction sector, Portugal is aligned with the European framework, and policies and regulations have been progressively adopted and promoted at the national level.

In this regard, the following can be highlighted:

**National Energy and Climate Plan 2021–2030 (PNEC 2030).** Adopted within the framework of the European Green Deal, the EU's Circular Economy Action Plan (CEAP), as well as the Portuguese CEAP

2030, outline specific actions to promote a circular economy across all industrial sectors, including construction. In particular, under the Sustainable Products Policy, it promotes product design aimed at durability, reuse, and recyclability, as well as the EU Strategy for Sustainable and Smart Mobility, which supports the use of sustainable construction materials and the reduction of emissions from the construction sector.

The **European Green Deal**, which aims to make Europe the first climate-neutral continent by 2050, has significant implications for the construction industry. This includes a push for energy-efficient buildings, reducing the carbon footprint of the construction sector, and promoting circular economy models. It complements the EU's broader environmental agenda and fosters sustainable construction practices through policy incentives.

**Strategy for the Sustainability of the Built Environment.** The EU's CEAP states that the European Commission will launch a new Strategy for the Sustainability of the Built Environment to ensure coherence in key action areas such as climate, energy efficiency and resource efficiency, construction and demolition waste (CDW) management, accessibility, digitalization and skills. It will promote circularity principles throughout the building life cycle through measures such as:

- t. performance requirements for construction products in terms of sustainability under the revised Construction Products Regulation (Regulation (EU) 2024/3110);
- u. promoting measures to improve the durability and adaptability of built assets in line with circular economy principles for building design;
- v. creating digital building logbooks;
- w. applying the Level(s) Framework to integrate life-cycle assessment into public procurement and the EU sustainable finance framework;

exploring the feasibility of setting carbon-reduction targets and the potential for carbon storage, among other aspects.

The **Construction Products Regulation** ensures that construction products in the EU meet minimum sustainability and safety standards. It includes provisions for the environmental performance of construction products, aligned with circular economy objectives, promoting the use of recycled materials, reducing the carbon footprint, and facilitating product reuse.

The **Waste Framework Directive** (2008/98/EC) establishes a hierarchy of waste management practices (reduce, reuse, recycle). For the construction sector, this Directive sets the framework for CDW management, encouraging recycling and the reuse of construction materials. It also sets specific recycling targets for CDW, focusing on reducing the environmental impact of waste. Under the Waste Framework Directive, the EU has set ambitious targets for recycling and reducing landfill use.

The **Ecodesign for Sustainable Products Regulation** will allow the establishment of ecodesign and information requirements for almost all categories of physical goods placed on the EU market. The new Ecodesign Regulation builds on the current Ecodesign Directive, which currently only covers energy-related products. It aims to significantly improve circularity, energy performance, and other aspects of the environmental sustainability of products placed on the EU market.

The **Energy Performance of Buildings Directive** (EPBD) together with the **Energy Efficiency Directive** (EED) both aim to achieve a fully decarbonised building stock by 2050. In particular, the revised EPBD will drive the Renovation Wave by creating national building passport schemes to guide owners through renovation towards zero-emission buildings. The revised directive also introduces disclosure

of whole-life-cycle emissions of buildings. A requirement to calculate the life-cycle global warming potential of new buildings constitutes a first step towards greater consideration of whole-life performance of buildings and of a circular economy.

- Overall Market Dynamics and Key Trends in Construction (e.g., investment, growth drivers, consumer demand for sustainable housing)

In Portugal, as in most European countries, several measures have been adopted to promote circular economy practices in the construction sector, such as agendas, plans, procurement strategies, among others, both at national and regional levels. These initiatives mainly focus on the following aspects:

- 11 **Product design:** encouraging the design of innovative and efficient buildings, infrastructures, and product systems that are adaptable, repairable, and made with efficient and sustainable materials;
- 12 **Building life cycle:** promoting the assessment of the environmental impact of buildings throughout their entire life cycle, from construction to demolition, fostering durability and the optimization of their use;
- 13 **Material passports:** developing and promoting the use of material passports, which track the materials and components used in buildings, facilitating their reuse or recycling at the end of a building's life.

Regarding the construction sector market, Portugal is currently experiencing a growth cycle driven by increased investment and the demand for more sustainable housing. This type of housing continues to face challenges in terms of costs and associated bureaucracy; however, a set of factors is shaping the future in this direction, among which the following can be highlighted:

- **Growing Investment:** Construction investment is expected to increase by around 4.9% in 2025 and 5.1% in 2026, according to recent forecasts by the Instituto Nacional de Estatística (INE, 2024) and sectoral studies from AECOPS.
- **High Demand vs. Limited Supply:** Demand for housing, particularly sustainable and affordable housing, significantly exceeds supply, driving prices up. According to the 2024 Housing Observatory, Portugal faces a deficit of over 100,000 affordable housing units, especially in metropolitan areas.
- **Rising Sustainable Housing:** Consumers are increasingly aware and place greater value on energy-efficient buildings, sustainable materials, and reduced environmental footprints. The PRR (Plano de Recuperação e Resiliência) allocated 2.7 billion euros to housing, with specific lines to support sustainable renovation and social housing.
- **Industrialization and Modular Construction:** There is a growing trend towards industrialized, prefabricated, and modular construction, with Portuguese companies such as Jular, Martifer, and Casais investing in production units to scale these technologies.
- **Incentives and Public Policies:** Various national and regional programmes (e.g., “Mais Habitação”, PRR, and IFRRU 2020) are supporting sustainable construction, reinforcing urban rehabilitation and the construction of affordable housing. Some municipalities have introduced property tax exemptions (IMI) for sustainable buildings certified under LEED, BREEAM, or LiderA.

- **Persistent Challenges:** High material and labour costs, a shortage of skilled professionals (especially in energy efficiency and digital construction), and bureaucratic delays continue to hinder the market's ability to meet demand.
  - **Future Outlook:** Housing prices are expected to remain on an upward trajectory in the short term, while sustainable housing continues to consolidate its position. According to Confidencial Imobiliário (2025), more than 30% of new housing projects licensed in 2024 were already designed with sustainability and energy efficiency as key drivers.
- Impact of Green and Digital Transitions on the Broader Construction Sector

According to the 2024 Green Transition Index, Portugal has advanced in the green economy rankings, now holding 15th place among 29 European countries evaluated. This upward movement is largely driven by the country's growing commitment to sustainable technologies. Published in February 2025, the Index measures Europe's progress across seven key areas of ecological transition: Economy, Nature, Industry, Energy, Transport, Buildings, and Waste (Fritz, Willendorf, & Zangemeister, 2024).

One of the report's main highlights is Portugal's performance in the Buildings category, particularly in energy efficiency. This success stems from the widespread adoption of renewable energy for household heating, improvements in construction energy efficiency, and urban rehabilitation projects guided by sustainable principles. Together, these initiatives have led to significant reductions in energy consumption across both public and private buildings.

Regarding the digital transition, in the current context, characterized by the exponential digitalization of society and the economy, it is imperative for Portugal to transition to a more digital, and consequently more competitive and internationally stronger country. In this sense, the Action Plan for the Digital Transition was created, which assumes the role of the country's transformation engine, aiming to accelerate Portugal, leaving no one behind, and promote the country globally. To this end, the Action Plan for the Digital Transition has as its main focus areas the digital empowerment of people, the digital transformation of businesses, and the digitalization of the State (Governo de Portugal, 2020)..

The dual Green and Digital Transition is one of the main drivers of transformation for the Construction sector in Portugal, and, although traditionally less digitalized, the sector is being pushed to become more efficient, competitive, and sustainable.

The impacts of this dual transition manifest in Digital Transformation with an increase in efficiency and productivity, focused on modernizing processes and work tools, aiming to improve productivity and reduce errors and costs through the implementation of BIM (Building Information Modeling), which allows for the creation of interactive and collaborative 3D models, improving the planning, execution, and management of the building lifecycle.

Several pilot initiatives are already underway in Portugal. For example, Infraestruturas de Portugal adopted BIM Level 2 in projects like the Porto–Lisboa high-speed railway, and the Digital Twin pilot project in the Porto Metro expansion is testing real-time operational modeling.

In the private sector, companies like Grupo Casais and DST Group are adopting Digital Twins, IoT systems, and off-site construction tracking tools to improve productivity and sustainability performance.

Other technologies gaining ground include:

- **AI-driven tools** for energy performance simulations and predictive maintenance.
- **IoT-based systems** for smart energy metering in buildings.
- **Augmented Reality (AR)** for on-site worker training and design validation.
- **Drones** used in topography, façade inspection, and progress monitoring.

Despite these advances, a 2024 survey by the Ordem dos Engenheiros Técnicos (OET) noted that only 1 in 5 SMEs in the Portuguese construction sector has implemented digital tools beyond basic CAD, mostly due to lack of qualified personnel and investment capacity — reinforcing the urgent need for targeted training programs.

Several pilot projects and digital tools are already being implemented in Portugal. Infraestruturas de Portugal has adopted BIM Level 2 in several large-scale infrastructure projects, including high-speed rail lines and bridge rehabilitation. Additionally, platforms like eConstrução 2.0, developed under the Simplex urbanístico initiative, are simplifying digital licensing processes and promoting interoperability between public authorities.

In terms of workforce digital readiness, the study by OET revealed that only 22% of construction SMEs regularly use BIM, while 54% report a lack of trained staff in digital tools, revealing a significant training opportunity.

Regarding the Green Transition, focused on Sustainability and Decarbonization, new requirements are being imposed, aimed at reducing the carbon impact and the use of resources. In this sense, Decarbonization and Energy Efficiency with the construction of more energy-efficient buildings and infrastructure, with the goal of reducing emissions; the use of Sustainable Materials with the demand and use of materials of natural origin and with a low carbon footprint; the promotion of Environmental Product Declarations (EPDs); and Modular and Pre-fabricated Construction all have the potential to develop the sector."

#### ▪ **Thematic Analysis of State-of-the-Art**

##### ○ **Digitalisation in Construction (Housing 4.0)**

- Key Digital Technologies (e.g., Building Information Modelling (BIM), Digital Twins, Artificial Intelligence (AI) for energy management, Internet of Things (IoT) in buildings)

- Adoption and Impact in Construction Processes and Building Operation
- Current qualifications and emerging job profiles
- Relevant market trends shaping the demand and supply
- **Circular Economy & Sustainable Construction Materials**
  - Principles and Practices (e.g., reuse, recycling, waste management strategies)

The construction sector—a major contributor to emissions and waste generation—holds immense potential to mitigate environmental impact while simultaneously fostering economic growth and social well-being (BUILD UP Team, 2024).

The shift to sustainability and circularity in this sector requires fundamentally rethinking the building process, from design to end-of-life considerations. By maximizing resource efficiency, promoting material reuse and recycling, adopting circular business models, and deploying innovative solutions, Europe can meet its climate targets and pave the way for a more sustainable future.

Circular Construction requires a comprehensive re-evaluation of building design practices. The central objective is to create, use, and repurpose assets, including buildings, infrastructure, and components in a way that minimizes natural resource depletion, environmental pollution, and negative impacts on ecosystems.

To support this, the European initiative Buildings As Material Banks (BAMB) introduced the concept of Material Passports, which is being explored in Portugal through pilot projects coordinated by LNEG and IST. These passports register detailed data about materials used in construction to enable future reuse, facilitating circular supply chains.

There is also growing interest in design for disassembly, with new guidelines being tested in Lisbon and Porto municipal tenders for public buildings. These include:

- Mandatory life-cycle analysis (LCA) pre-project.
- Integration of reused or recycled components (e.g., steel beams, window frames).
- Use of prefabricated components for easier dismantling.

The development of Circular Business Models in the construction sector is also accelerating, such as “product-as-a-service” models, where façade systems or HVAC equipment are leased and maintained by the supplier, increasing accountability for end-of-life recovery.

Aligned with the principles of the circular economy, which seeks to keep resources in use for as long as possible (Severin & Michalíková, 2024), new construction must prioritize efficiency and the right material selection by integrating the following core aspects:

- Design for Deconstruction: Ensuring easy and safe disassembly for future recovery.

- **Material Reuse and Recycling:** Prioritizing secondary materials and minimizing virgin resource intake.
- **Resource Efficiency:** Achieving efficiency through optimized design, prefabrication techniques, and lean construction practices.
- **Circular Business Models:** Developing new models that support extended product life and service provision over ownership.
- **Digitalization and Data Management:** Utilizing technology for better tracking, inventory (material passports), and informed decision-making regarding material flow.
- **Sustainable Materials and their Application in Buildings**

In Portugal, the construction sector was responsible for generating around 3.5 million tonnes of construction and demolition waste in 2022, with a considerable recovery of 3.1 million tonnes (through recycling, backfilling, and other recovery operations) (APA, 2024). However, since 2016, there has been continuous growth in the extraction of natural resources. In 2020, a total of approximately 60 million tonnes of minerals were extracted, of which 90% are minerals for construction (Fonseca et al., 2022).

The commitment to sustainability is essential, and the materials consumed in this sector play a crucial role. It is therefore important to use more sustainable materials, which are of natural and local origin, have a low embodied energy value, and are reusable and/or recyclable, as well as investing in innovation in sustainable construction materials. The trend in the sector points towards the introduction of innovative materials and technological solutions that transform design and development. Some examples in this regard are:

- **ICF Systems and EPS Blocks:** ICF (**Insulated Concrete Forms**) and EPS (**Expanded Polystyrene**) **blocks** are materials that offer superior thermal insulation, reducing heat loss and increasing energy efficiency. Made from recycled materials, such as plastic or polystyrene, they contribute to sustainability by retaining heat and decreasing dependence on heating systems.
- **The integration of Nanotechnology**, a revolutionary innovation that offers improvements in the strength and performance of materials, allowing for example, the development of self-cleaning surfaces and glass that blocks UV radiation, contributing to the durability and energy efficiency of buildings. Nanoparticles also increase crack resistance and reduce the need for maintenance, thus increasing durability.
- **Bioconstruction**, through the use of organic materials, where renewable and biodegradable materials such as bamboo, hemp, straw and others are used. These materials reduce the carbon footprint of constructions due to production and process with a reduced environmental impact.
- **The use of alternative substitution materials** such as industrial and urban waste, ashes, recycled plastics, recycled wood, recycled metals, etc."

Portuguese companies have been at the forefront of innovation in sustainable materials. For example:

- **Amorim Cork Composites** develops insulation products made from recycled cork, offering excellent thermal and acoustic performance.
- **Gyptec Ibérica** produces plasterboards incorporating post-consumer recycled content, reducing the environmental footprint of interior partitions.

- **CIMPOR** and **SECIL** have launched low-carbon cements, aligned with the EU taxonomy for sustainable activities, supporting CO<sub>2</sub> reductions in structural works.

In addition, there is a growing use of geopolymers, recycled aggregates from CDW, and bio-based materials such as mycelium-based composites for insulation and finishes — technologies currently under testing in research projects like ReBuild 2024 (LNEG).

- Current qualifications and emerging job profiles

According to the **IEFP (2024)**, the construction sector in Portugal faces an acute skills gap in several areas:

- BIM and digital coordination.
- Energy efficiency auditing.
- Site logistics for modular construction.
- Circular economy consultancy and material passport implementation.

New professional profiles are emerging, including “Construction Circularity Manager”, “BIM Integrator”, and “Sustainable Materials Specialist”. These roles require multidisciplinary skills, combining traditional construction knowledge with digital tools and sustainability practices.

- Relevant market trends shaping the demand and supply
- **Cross-Cutting Analysis & Opportunities**
  - Interlinkages and Synergies between the Thematic Areas
  - Common Challenges and Barriers across Diverse European Regions (e.g., policy, financial, skills-related)
  - Innovation Opportunities in VET for Sustainable Construction (identifying promising areas for intervention)
- **Conclusions and Recommendations for WP4**
  - Key Findings Summary (synthesis of the most important insights)
  - Strategic Insights for Curriculum and Training Programme Design (direct recommendations for WP4)

The current trends in training and education for the construction sector are strongly linked to digitalization, sustainability, circularity, new construction methods and new materials, reflecting the sector's need to modernize and respond to environmental, cultural and productivity and efficiency challenges.

According the Direção-Geral do Ensino Superior (2024), there is a critical lack of formal training pathways in areas like modular construction assembly, advanced BIM coordination, and circular economy design.

Therefore, the Exel4Housing 4.0 project should consider integrating the following targeted modules into training programs:

### Digital Technologies and Automation

- **BIM for Site Managers:** Focused on coordination between field and office.
- **IoT and Data Management:** Smart building integration and monitoring.
- **AR/VR for Safety and Design Review:** Use of immersive tools for planning and worker training.

### Sustainability and Circular Economy

- **Circular Construction and CDW Management:** Focus on reuse, sorting, and reporting obligations.
- **LCA and Carbon Accounting:** Training to calculate and report GWP (Global Warming Potential) for new buildings.
- **Sustainable Materials Lab:** Hands-on training in selecting and testing low-carbon and recycled materials.

### Innovative Construction Methods

- **Modular Assembly and Logistics:** Skills for off-site assembly and on-site integration.
- **3D Printing Techniques:** Introduction to hardware and design tools for printed elements.
- **Material Passports and Digital Twins:** Use of digital tools for end-of-life planning and asset management.

In summary, there is a clear need to rethink VET pathways in construction, aligning curricula with the sector's evolving demands. This includes stronger partnerships between industry, vocational schools, and higher education institutions to co-develop programs that are flexible, modular, and tailored to real-world applications.

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## Annex 9: State-of-the-Art National Report - Spain



# REPORT ON THE STATE OF THE ART

SPAIN

## ● Introduction

The purpose of this task is to provide a state-of-the-art analysis of energy efficiency and sustainable housing practices, with a focus on how these are being integrated into training, qualifications, and innovation frameworks within Spain. Specifically, the report aims to:

- Identify current practices and innovations in sustainable housing, with emphasis on digitalisation (Housing 4.0) and circular economy approaches.
- Map how these innovations intersect with education and training, particularly within VET systems and lifelong learning.
- Highlight market and policy trends shaping the demand for new qualifications and skills.
- Provide insights into how ongoing publicly funded projects are fostering synergies between sustainability, digital transition, and workforce development.

The analysis has been conducted using a desk research methodology, combining the following approaches:

- Literature review: Examination of academic studies, policy documents, EU strategies, and Spanish national frameworks related to sustainable housing, energy efficiency, and training.
- Case study analysis: Identification of specific initiatives and projects (both national and EU-funded) that demonstrate innovative practices in circular construction, digitalisation in housing, and related training approaches.
- Comparative framework analysis: Review of methodologies and key performance indicators (KPIs) from projects, with attention to how these are applied in training and upskilling contexts.
- Stakeholder mapping: Identification of the main target groups (construction professionals, decision-makers, VET institutions, and end-users and their training and qualification needs in the context of the green and digital transitions.

## ● General Context: European Construction Sector & Energy Transition

This section describes the general context of the European Construction Sector & Energy Transition in Spain. It reviews (1) the policy and regulatory landscape, (2) the overall market dynamics and key trends in construction (e.g., investment, growth drivers, consumer demand for sustainable housing), and (3) impact of green and digital transitions on the broader construction sector.

## 2.1. Policy and Regulatory Landscape

In Spain, the EU directives (i.e., European Green Deal, the Energy Performance of Buildings Directive (EPBD), the Renovation Wave, the EU Taxonomy for Sustainable Activities, and the Circular Economy Action Plan) are transposed and complemented by the following national frameworks:

- National Energy and Climate Plan (PNIEC 2021–2030) [1]: Sets the target of reducing greenhouse gas emissions by 23% by 2030 (compared to 1990), increasing renewables to 42% of final energy use, and improving energy efficiency by 39.5%. Buildings are a priority sector, with emphasis on renovation and renewable integration.
- Spanish Long-Term Renovation Strategy (ERESEE 2020) [2]: Aligned with the Renovation Wave, this strategy seeks to modernise Spain's ageing building stock (around 80% of homes were built before 2000), prioritising energy retrofitting and tackling energy poverty.
- NextGenerationEU and Recovery, Transformation and Resilience Plan (PRTR) [3]: Spain has allocated significant funds (over €6.8 billion) to building renovation, energy efficiency, and sustainable urban development. This is a major driver of current renovation activity, particularly in residential and social housing.
- Spanish Circular Economy Strategy (España Circular 2030) [4]: Sets objectives to reduce material consumption by 30%, cut waste generation by 15%, and improve recycling and reuse in construction. The strategy positions construction as a key sector for implementing circular principles.

## 2.2. Overall Market Dynamics and Key Trends in Spain

The Spanish construction sector is a major contributor to the economy, representing around 5.5% of GDP and employing over 1.3 million workers. Its transformation is being shaped by EU policy drivers, financial incentives, and evolving consumer preferences:

- Renovation demand: According to Fundación Naturgy (2021) [5], Spain's current renovation rate is far below what's required by EU policy; there are around 9.4 million homes in urgent need of refurbishment, and to meet Green Deal targets, Spain would need to increase its building renovation effort by up to 25 times the current rate.
- Investment growth: The PRTR funds—with a budget of 3420 million euros and target approximately 410,000 housing renovation actions by mid-2026 to reduce non-renewable energy consumption in homes by at least 30% and lowering heating/cooling demand by at least 7%—have boosted investment in renovation and sustainable housing. Municipalities and regional governments are launching large-scale renovation programmes targeting both private and social housing [6].

- Market pull for sustainable housing: Buyers and tenants increasingly value low-energy, healthy, and smart homes. Certifications such as Passive House, BREEAM, and VERDE (Spain's national certification system) are expanding in the residential sector [7].
- Innovation ecosystem: Spanish firms are investing in prefabrication, digitalisation (BIM, digital twins), and low-carbon materials (recycled concrete, bio-based insulation). For instance, RECONSTRUCT project [8]— developing low-carbon alternatives to Portland Cement; use of recycled and bio-based materials; applying both on-site and prefabricated components; digital tools for material lifecycle tracking. Also, 011h (Spanish proptech) [9]— a company using a digital platform with prefabricated elements, timber, carbon-neutral materials, etc., with aims to cut build time and emissions. Additionally, Industrialized Social Housing, Vivas Arquitectos & EXE Arquitectura — project in Barcelona using modular prefabricated systems; optimizing assembly, reducing carbon footprint, combining passive + active strategies [10].
- Labour and skills gap: Like the EU overall, Spain faces shortages in qualified professionals able to perform deep energy renovations, manage circular materials, and apply digital tools. The challenge is particularly acute in vocational training, where new qualifications and curricula are needed [11, 12, 13].

## 2.3. Impact of Green and Digital Transitions on the Spanish Construction Sector

Spain reflects the European trend of a twin green and digital transition, with local particularities:

- Green Transition:
  - Priority on large-scale energy retrofitting to reduce emissions and alleviate energy poverty [14,15].
  - Integration of solar photovoltaic systems in residential and public buildings, supported by subsidies [16, 17].
  - Adoption of circular construction practices through regional initiatives, e.g., Catalonia's promotion of recycled aggregates and Basque Country's Circular Housing pilots [18, 19].
- Digital Transition (Construction 4.0 / Housing 4.0):
  - Increasing use of BIM (mandated for public procurement in many cases since 2019), digital twins, and smart building management systems [20].

- Growth of start-ups and SMEs offering digital monitoring solutions for energy efficiency and renovation tracking [21,22].
- Pilot initiatives integrating material passports and traceability systems for construction waste and recycled materials [23].
- Convergence of Green & Digital:
  - Application of BIM to design energy-efficient renovations and track lifecycle impacts [24, 25].
  - Use of digital material passports to support circular practices [23].
  - Training initiatives are beginning to integrate digital and green skills into construction curricula [26, 27, 28].

## ● Analysis summary

### 3.1 Digitalisation in Construction (Housing 4.0)

#### 3.1.1. Key digital technologies:

The construction / housing value chain is integrating several digital technologies that together define “Housing 4.0”:

- Building Information Modelling (BIM) — used from design through construction to operation; increasingly required or incentivised in public procurement and used to coordinate multi-disciplinary teams, simulate performance, and embed product/material data. (Seen in BIM4Ren pilots and national BIM plans.)
- Digital Twins — real-time or near-real-time virtual replicas that combine BIM with IoT sensor feeds for operation, predictive maintenance and occupant comfort optimisation (demonstrated in Spanish pilots such as Tecnalia/WellBIM-style work and the digital twin demo references).
- IoT & smart building management systems (BMS) — sensors for energy, indoor air quality, occupancy and equipment status that feed dashboards and automated control systems. These are commonly paired with digital twins and BMS for operational optimisation.
- Digital Material Passports / Product Passports — structured digital records of material composition, provenance, recyclability and LCA data to support reuse, traceability and circular

practices (seen in pilot initiatives and private solutions like CircularPass / materials-passport projects).

- Life-Cycle Assessment (LCA) / LCSA tools integrated with BIM — tools that calculate embodied carbon, embodied energy and other life-cycle impacts directly from modelled elements.
- Cloud platforms / dashboards / analytics & AI — for energy monitoring, renovation tracking, predictive maintenance, and decision support (used by start-ups and SMEs offering energy monitoring and renovation management).
- Prefabrication & digital fabrication interfaces — CAD/CAM links between BIM and off-site manufacturing, enabling modular/panelised housing and quality control of low-carbon prefabricated elements.

It is worth noting that these technologies are complementary: BIM provides the information backbone; digital twins + IoT operationalise the building; material passports + LCA enable circularity, and cloud/AI layers provide analytics and decision support.

### 3.1.2. Adoption and impact in construction processes and building operation

The following adoption trends have been observed:

- Design & procurement: BIM adoption has grown rapidly in public procurement and large private projects (multiple Spanish public tenders and national BIM plans). BIM is being used not only to produce 3D models but to coordinate disciplines, clash-detect, quantify materials and link to procurement and prefabrication workflows.
- Construction: Use of prefabricated elements and factory production is increasing where BIM links to off-site manufacturing; traceability and digital quality control reduce rework and waste. Pilot projects (prefab low-carbon façade panels in RECONSTRUCT) show how digital design + off-site assembly shorten timelines and reduce embodied carbon.
- Operation: Buildings instrumented with sensors and managed through BMS/digital twins show measurable improvements in energy performance, occupant comfort and maintenance costs (pilot evidence and case studies). Digital twins enable predictive maintenance and continuous commissioning, improving system uptime and enabling demand-side response.
- Circularity & materials: Digital product passports and traceability pilots are still at demonstration scale, but they are being trialled to capture material composition, facilitate deconstruction, and feed LCA metrics. Projects like VALREC and RECONSTRUCT show practical routes for CDW valorisation and tracked reuse.

Which have led to the following impacts:

- Quality & speed: BIM + prefabrication improve build quality and reduce construction time and errors.
- Energy & carbon: Integrating LCA into BIM and using digital twins for operation yields better whole-life carbon outcomes — both embodied (through material choices, prefab) and operational (through BMS optimisation). Early demo targets (e.g., RECONSTRUCT) aim for significant reductions in embodied carbon (e.g., ~20% in specific demo strategies).
- Waste reduction / circular flows: Traceability and CDW valorisation pilots enable higher recycled content (recycled aggregates, reuse of components), but scaling depends on standards, supply chains and procurement.
- Economic & social: Digitalisation can reduce lifetime operating costs, but adoption requires upfront investment, new capabilities and supply-chain alignment. People-centric pilots emphasise occupant acceptance as critical—circular/low-carbon solutions must meet comfort and affordability objectives.

Also, the following barriers have been observed:

- SME capacity and skills — many small contractors lack staff trained in BIM, digital twins or material passport workflows.
- Data & interoperability — heterogeneous data standards, incomplete product data, and the need for open standards (buildingSMART / openBIM) still limit seamless integration.
- Regulation & procurement — public procurement increasingly uses BIM, but procurement models and building codes must further incentivise circular content and whole-life performance.
- Costs & supply — recycled/bio-based materials and novel prefabricated solutions can face cost & availability constraints until scale is reached.

#### ▪ Current qualifications and emerging job profiles

In the one hand, INCUAL / CNCP defines national vocational qualifications used by FP (Formación Profesional) and Certificados de Profesionalidad. Several construction qualifications already include modules relevant to energy efficiency, rehabilitation, and building systems. Fundación Laboral and sectoral bodies provide short courses and in-company training. In the other hand, VET / FP cycles (Grado Medio / Grado Superior) cover construction trades, building services, and some energy/installation modules. Short, practical courses (e.g., Fundación Naturgy's 175–195-hour FP courses on rehabilitation) complement full cycles.

As far as emerging job profiles are concerned, the following ones have been identified:

- BIM Manager / BIM Coordinator (Construction): coordinates models, ensures data integrity, links BIM to off-site production and procurement. Requires BIM authoring skills, standards knowledge, and data exchange competency.
- Digital Twin / Building Lifecycle Engineer: integrates sensor data with models, manages digital twin platforms, performs performance analytics and predictive maintenance. Skills: IoT, data analytics, building services and systems knowledge.
- Low-Carbon Prefab Technician / Off-site Manufacturing Specialist: designs and assembles prefabricated low-carbon elements; requires knowledge of prefab production, logistics and quality control.
- Material Passport / Circularity Specialist: assesses material flows, produces/consumes product passport data, oversees deconstruction planning and CDW valorisation. Skills: material science basics, LCA, traceability systems.
- Energy Retrofit Technician / Heat-Pump Installer / Building Envelope Specialist: hands-on retrofit roles; skilled in insulation, airtightness, HVAC decarbonised systems and energy audits.
- Building Data Analyst / Energy Manager for Housing Portfolios: aggregates building-level data, identifies retrofit priorities, manages portfolio energy strategies.
- Sustainability / Circular Procurement Officer: public purchaser who specifies circularity KPIs and enforces material / LCA requirements in tenders.

In terms of qualification gaps, it has been seen that existing VET training courses often lack integrated modules combining BIM + LCA + circularity + hands-on prefab training. Trainer upskilling is a bottleneck — Fundación Naturgy's "train the trainer" courses and Construction Blueprint initiatives aim to address this. There is also a need for micro-credentials and modular short courses for in-service workers.

- Relevant market trends shaping the demand and supply

The following demand-side drivers have been identified:

- Policy & funding: PRTR/NextGeneration funds, PREE and other Spanish subsidy programmes drive immediate demand for renovation and green retrofits, creating a market pull for trained teams able to deliver energy-efficient renovations.
- Regulation & procurement: Mandatory or encouraged BIM in public procurement, energy performance standards (EPBD), and renovation incentives push demand toward digital workflows and whole-life assessments.

- Consumers / occupiers: Growing preference for energy-efficient, healthy homes increases demand for certified, smart, low-energy dwellings. Certifications (Passive House, BREEAM, VERDE) increase asset value.
- Corporate sustainability & social housing: Housing providers and local authorities are targets for large retrofit programmes, often requiring scalable prefabrication and digital management.

The following supply-side drivers have been identified:

- Innovation & scale-up of prefab / low-carbon materials: Demonstrator projects (RECONSTRUCT, VALREC) are building supply-side capacity for recycled aggregates, low-carbon panels and prefabrication methods. As these scale, costs will fall and adoption accelerate.
- Start-ups & SMEs: Growth of digital monitoring and SaaS platforms for building energy and renovation tracking; these create service models that integrate with traditional contractors.
- VET & training supply: Expansion of short targeted courses, public FP centre upgrades (e.g., renovated FP centres with PV & green roofs), and Blueprint/Green Growth projects that produce curricula and trainer materials are increasing supply of trained labour — but not yet at required scale.

This leads to the following market tensions/risks:

- Shortage of qualified workforce slows project delivery despite funding availability.
- Fragmented supply chains and regional differences in CDW processing capacity constrain standardisation of circular materials.
- Upfront financing / business models: While subsidies help, long-term business cases for low-carbon materials or prefabrication rely on scale and lower cost curves.

## 3.2 Circular Economy & Sustainable Construction Materials

### 3.2.1. Principles and Practices

- Design for disassembly and reuse: maximise the ability to take buildings or building elements apart so components can be reused with minimal loss of value. Demonstrator projects (RECONSTRUCT) explicitly promote deconstruction planning and prefabricated, demountable façade and panel systems to enable reuse.
- Material substitution and low-carbon choices: replace high-embodied-carbon materials (e.g., Portland cement) with low-carbon alternatives (industrial by-products, recycled aggregates,

bio-based insulation). RECONSTRUCT demos target significant cement substitution and recycled content increases.

- Circular material loops (closing resource loops): treat construction & demolition waste (C\&DW) as feedstock (recycled aggregates, reprocessed concrete, reclaimed façade elements) rather than as disposal. VALREC-type initiatives and regional programs in Spain are piloting CDW processing to create usable, certified secondary materials.
- Digital enablement / traceability: use material/product passports and traceability systems to record composition, provenance and reuse history; these enable trust and enable circular procurement. Pilots (CircularPass / Digital Product Passport demos, Sacyr materials passport work) are testing models.
- Life-cycle thinking (LCA/LCCA): evaluate environmental impacts across stages (embodied + operational) to make decisions that minimise whole-life carbon, not just upfront cost. SIRCULAR integrates LCA/KPIs; projects link LCA tools with BIM for practical workflows.
- Selective demolition & deconstruction: replacing brute-force demolition with careful dismantling to recover high-value components (windows, frames, HVAC modules). Demonstrators embed deconstruction steps in project planning.
- On-site sorting & improved CDW logistics: segregated collection, on-site crushing, local recycled aggregate production facilities (VALREC models), to reduce transport carbon and improve material purity.
- Prefabrication & modular construction: off-site production reduces waste, increases precision, and facilitates future disassembly; RECONSTRUCT and other pilots combine prefab with recycled/bio-based materials.
- Quality assurance & standards for secondary materials: testing, certification, and procurement standards are crucial so recycled materials meet structural and durability requirements; projects and industry consortia are developing these frameworks.

### 3.2.2. Sustainable Materials and their Application in Buildings

- Recycled mineral aggregates & secondary concrete: used as coarse/fine aggregates in concrete mixes and prefabricated concrete panels; projects (VALREC, RECONSTRUCT) aim to scale up recycled content while ensuring performance.
- Low-carbon binders and cement substitutes: partial replacement of clinker with industrial by-products (fly ash, blast-furnace slag) or innovative binders to cut embodied CO<sub>2</sub>. RECONSTRUCT demos are explicitly trialling such mixes.

- Bio-based materials: wood/timber systems, cross-laminated timber (CLT) for structural elements, and bio-insulation (hemp, wood-fibre, cork), used in prefab panels and interior finishes to reduce embodied carbon and enable circular end-of-life options.
- Reclaimed elements: doors, windows, metal fittings, sanitaryware reused in refurbishment projects (where selective deconstruction enables recovery).
- Innovative insulation & façade systems: prefabricated insulated panels combining recycled or bio-based core materials with durable outer skins; SIRCULAR prototypes focus on such façade elements to balance thermal performance and circularity.
- Materials with digital passports: products embedded with data (QR/blockchain) describing composition, maintenance history and reuse potential to ease future reuse and LCA calculation.

### 3.2.3. Current qualifications and emerging job profiles

- Deconstruction Specialist / Dismantling Supervisor: plans and oversees selective deconstruction operations, identifies reusable components, ensures safe dismantling and sorting for reuse. Skills: structural understanding, salvage techniques, safety, materials identification.
- Material Recovery & Reprocessing Technician: operates CDW processing equipment (crushing, sorting), performs quality control on recycled aggregates and secondary materials. Skills: plant operation, QA/QC testing, regulatory compliance.
- Circular Materials Designer / Specification Specialist: selects low-carbon, recyclable or reusable materials, prepares material passports and interfaces with procurement. Skills: materials knowledge, LCA basics, specification writing, familiarity with product passports.
- Material Passport/Data Manager: records, verifies and maintains digital product passport data; links passports to BIM models and procurement. Skills: data management, digital standards (DPP/DPD), interoperability knowledge.
- Recycled Materials Quality Assessor / Lab Technician: conducts testing and certification to validate structural/physical properties of recycled materials. Skills: lab testing, standards, sampling protocols.
- Circular Procurement Officer: designs tendering processes to prioritise circular KPIs (recycled content, deconstruction clauses), evaluates supplier claims. Skills: procurement law, KPI assessment, LCA interpretation.

## 3.4 Conclusions and Recommendations for WP4

- Modular micro-credentials: Create short, stackable modules combining BIM basics + LCA + material passport entry + retrofit practice (e.g., 120–200 hours) to quickly upskill installers and supervisors.
- Train-the-trainer nationwide programme: Scale initiatives like Fundación Naturgy's trainer courses to rapidly expand teacher competencies in digital/circular topics.
- Living-lab placements: Formalise placements at demo sites (SIRCULAR/RECONSTRUCT/VALREC demos) so trainees gain hands-on experience with prefab panels, recycled materials, and digital twins.
- Dual pathways & apprenticeships: Expand hire-and-train models (e.g., Bedmar y Garcéz project) where trainees are employed while obtaining certificated skills, with pathways to Certificados de Profesionalidad / FP grado.
- Interoperability & standards training: Ensure curricula cover open BIM standards (buildingSMART, IFC), digital passport standards, and basic data governance to reduce interoperability friction.
- Career maps & new profiles: Define clear qualification maps for emerging roles (BIM Manager, Digital Twin Engineer, Material Passport Specialist) and align them with INCUAL/CNCP units.
- Create competency maps linking CNCP/INCUAL units to emerging circular roles (e.g., Deconstruction Specialist, Material Passport Manager, Circular Procurement Officer) so Certificados de Profesionalidad and VET cycles can be updated.

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Annex 10: State-of-the-Art National Report - Sweden



# REPORT ON THE STATE OF THE ART

SWEDEN

## ● Introduction

This report is mapping the European construction sector's policy drivers, market dynamics, and technological trends, and examines their implications for skills, jobs, and vocational training. The purpose is to understand how the green and digital transitions—driven by EU legislation such as the Energy Performance of Buildings Directive, the EU Taxonomy, the Net-Zero Industry Act, and the Renovation Wave—are reshaping business models, construction processes, and investment priorities. Using structured desk research, the analysis combined EU-level sources with a detailed case study of Sweden, highlighting its leadership in digitalisation and circular construction practices. The findings were then translated into concrete opportunities for VET, with a focus on curriculum design, micro-credentials, and living-lab approaches. In doing so, the analysis bridges European regulatory and market developments with national best practices and identifies how vocational education and training can equip the workforce with the competences needed to deliver on the climate and digital ambitions of the sector.

## ● Analysis summary

The analysis shows a clear arc from EU policy to practice to training. With the EPBD, the Taxonomy, ETS2/SCF and the NZIA, Europe is steering construction toward zero-emission, whole-life-carbon performance, electrified heating and verifiable, data-rich operations. Despite a short-term slump in housing starts and heat-pump sales, medium-term demand is pulled by renovation and rooftop PV. Digitalisation is now basic infrastructure: BIM, digital twins and IoT enable predictive O&M and industrialised, DFMA-style delivery. Sweden offers a mature blueprint—BIM is standard for major clients, city-to-building digital twins and smart-meter ubiquity support “Housing 4.0,” and circularity is accelerated by climate declarations, product databases and rapid advances in timber, low-carbon concrete and near fossil-free steel. Frictions persist—uneven transposition, split incentives, skills shortages and interoperability gaps—so VET must pivot to stackable, role-based micro-credentials that turn project data into audit-ready evidence: BIM-to-FM data continuity, LCA/EPD and climate declarations, energy analytics, off-site retrofit and reuse coordination, advanced HP/PV/storage operations, and green procurement/Taxonomy literacy. Embed living labs, a standard toolchain (IFC/i2, EPD software, BEAst/PEPPOL, twin platforms) and assessment built on finance-grade KPIs.

## ● Indicative outline

### ● Introduction

Purpose of the task and methodology used

- **Map the landscape:** Summarise the European construction sector's policy drivers
- **Assess impacts**
- **Deep-dive Sweden**
  
- **Translate to VET action: Structured desk research (EU, national):**
  - EU primary sources
  - Sector statistics and outlooks
  - Sweden sources for practice and standards
  
- **Analytical lenses:**
  - **Policy & regulation:** compliance and finance signals;
  - **Market & technology:** adoption, maturity, supply chains;
  - **Skills & jobs:** current qualifications and emerging roles;
  - **VET implications:** training needs, assessment artifacts, KPIs.
  
- **Triangulation & relevance filter:** Prioritised authoritative and most recent sources; cross-checked quantitative figures
- **Scope & timeframe:** EU-27 with a Sweden deep dive; evidence current to Oct 2025; focus on residential and public buildings (new build + renovation)
  
- **General Context: European Construction Sector & Energy Transition**

**Policy and Regulatory Landscape (e.g., EPBD, European Green Deal, Renovation Wave, EU Taxonomy relevant to construction)**

- **EPBD (recast, Directive (EU) 2024/1275).** New buildings: public from 2028 and all from 2030 must be zero-emission; disclosure of life-cycle GWP scales up from 2028/2030; countries must file National Building Renovation Plans to steer stock toward ZEB by 2050. Expect national roadmaps and targets (rather than strict EU-level MEPS for each building).
- **Renovation Wave (Green Deal flagship).** Goal to double renovation rates and renovate 35 million buildings by 2030, linking energy savings with local jobs.
- **EU ETS2 + Social Climate Fund.** A new carbon market for fuels in buildings & road transport becomes operational in 2027 (upstream at fuel suppliers), with the Social Climate Fund from 2026 cushioning vulnerable households and financing efficiency/renovation.
- **EU Taxonomy.** “Green finance rulebook” shaping capital flows: construction & real estate activities (new build, renovation, acquisition/ownership) have technical screening and DNSH criteria; alignment can materially affect financing costs and investor access.
- **Net-Zero Industry Act (NZIA).** In force June 2024; aims for ~40% EU manufacturing capacity of strategic net-zero tech by 2030 (heat pumps, PV, batteries, etc.), with faster permitting—relevant to supply chains and capex for building decarbonisation. (Directive, EU 2024, Regulation EU 2020)

### Overall Market Dynamics and Key Trends in Construction (e.g., investment, growth drivers, consumer demand for sustainable housing)

- **Cyclical headwinds vs structural demand.** High rates and costs have hit residential starts (e.g., Sweden's house-building slump; Germany's permit gap amid housing need), yet underlying demand for affordable, efficient homes remains strong.
- **Electrification & rooftop solar**—strong but bumpy. EU added ~65 GW solar in 2024, with a slight slowdown expected in 2025 as some rooftop incentives fade, though cumulative capacity keeps climbing. Heat-pump sales fell ~22% in 2024 after two boom years, reflecting policy uncertainty and energy-price swings; long-term targets (e.g., 60 m units by 2030) still pull demand.
- **Investment outlook.** Despite the near-term dip, analysts project medium-term growth in European construction driven by renovation of ageing stock, urbanisation, and green-building practices—with product markets signaling opportunity in retrofit solutions.
- **Skills & capacity.** EU's Transition Pathway for Construction highlights labour/skills shortages, digital adoption gaps, and the need for industrialised renovation (prefab, BIM) to meet targets at scale. (FIEC 2025, SolarPower Europe 2024).

### Impact of Green and Digital Transitions on the Broader Construction Sector

- **Business models shift to performance & whole-life carbon.** EPBD's life-cycle GWP disclosure and Taxonomy screens push developers toward low-carbon materials, circularity, and EPC-backed, taxonomy-aligned assets to unlock financing.
- **Electrify heat + integrate DERs.** Policy plus ETS2 pricing steers heat away from fossil fuels to heat pumps, solar PV, storage, and smart controls; grid-interactive buildings and prosumer models gain value.
- **Digitalisation** becomes mandatory plumbing. BIM/digital twins, IoT, and data analytics enable predictive maintenance, energy optimisation, and off-site industrialised renovation, changing contractor skill profiles and site logistics.
- **Social dimension & affordability.** The Social Climate Fund hard-wires equity into the transition (subsidies for renovation, clean heating, mobility), aiming to contain energy-poverty risks as carbon pricing expands. (European Commission 2023, Directive (EU) 2024)

### Thematic Analysis of State-of-the-Art

### Digitalisation in Construction (Housing 4.0) in Sweden

- Key Digital Technologies in use

- **BIM as “default” for major clients.** Public infrastructure clients (esp. Trafikverket) have driven BIM uptake and standardisation; BIM Alliance Sweden maintains sector guidelines and promotes uninterrupted information flows across planning–build–operate.
- **Digital twins from district to building scale.** Active research/demonstrators include KTH’s Dig-IT Lab (building/microgrid twins) and Smart Built Environment projects (e.g., rainfall modelling), plus city-scale pilots such as Stockholm Royal Seaport’s digital-twin approach (see best practice report).
- **AI for energy & operations.** Recent Swedish studies and pilots show AI-driven analytics improving building energy efficiency and operational decisions (fault detection, tariff-aware control, portfolio optimisation).
- **IoT & smart metering as infrastructure.** Sweden’s early smart-meter rollout (and second-wave upgrades) enabled hourly metering and data access that underpin proptech/optimisation services in housing.
- **Industrialised/off-site digital fabrication.** Model-based design-to-factory with timber modules (e.g., Lindbäcks) illustrates digital production flows for multi-storey housing.
- **Digital supply-chain & e-business standards.** BEAst standards (ordering, logistics, invoicing) and PEPPOL adoption streamline data exchange across contractors and suppliers. (Smart Built Environment 2024, BIM Alliance 2024)

▪ Adoption and Impact in Construction Processes and Building Operation

- **Design & construction.** BIM is widely specified in public works; the remaining friction is contractual (AB/ABT/ABK alignment) and information-requirements maturity rather than tooling. Impacts include fewer clashes, better quantities, and enabling industrialised methods.
- **Handover & operations.** Swedish research flags the gap between project BIM and facility management; initiatives (BIM Alliance guidelines/fi2 standards) aim to improve data continuity into the O&M phase.
- **Energy-smart housing in practice.** Flagship sites demonstrate integrated PV-storage-heat-pump systems with advanced controls (e.g., Brf Viva using second-life bus batteries; Akademiska Hus pilots), showing energy-cost and flexibility benefits when paired with data-driven operation.
- **City/system integration.** Digital-twin pilots link buildings to grids, water and mobility, supporting resilience and planning (e.g., Stockholm microgrid twin demonstrator). (BIM Alliance 2024, Trafikverket 2024)

▪ Current qualifications and emerging job profiles

- **Baseline upskilling needs.** National skills analyses (MYH) and labour-market outlooks point to persistent shortages and a cross-cutting need for digital competence, BIM literacy, AI/data skills, sustainability & circularity, plus geospatial/GNSS skills.
- **BIM/VDC Coordinator–Manager** (model standards, CDE workflows, IDMs/BEAst alignment).
- **Digital Construction Engineer / Site Digitisation Lead** (laser scanning, 4D/5D, IoT on site).
- **Building Energy/Proptech Data Analyst** (BMS+IoT data, AI-assisted optimisation, demand response).

- **Digital Twin Engineer** (model federation, sensor integration, simulation).
- **Industrialised House-Building Production Engineer** (design-for-manufacture, timber modules/CLT).

YH and higher-ed programmes are already branding for “hållbart och digitalt byggande” and teaching BIM-centric workflows.

- Relevant market trends shaping the demand and supply

- **Strategic push via Smart Built Environment.** Sweden’s long-running national innovation programme coordinates R&D, open standards and pilots to keep the sector at the digital forefront.
- **Proptech & energy-flexibility momentum.** With smart meters ubiquitous, business models that monetise flexibility (tariffs, aggregator services) and optimise building portfolios are expanding—supported by research and high energy-price volatility experience.
- **Productivity drive through industrialisation.** Timber-based modular building and factory-driven processes are scaling, supported by BIM and digital QA—seen as key to addressing housing needs despite cyclical headwinds.
- **Data & digital-infrastructure considerations.** National attention to the energy footprint of data centres and digital systems underscores the need for efficient data pipelines and edge processing in AEC/proptech solutions.
- **Public-sector procurement & standardisation.** Continued emphasis on digital deliverables, open formats and e-procurement (BEAst/PEPPOL) is reinforcing adoption through the supply chain. (MYH 2024, Arbetsförmedlingen 2025).

What this means for Excel4Housing / VET design

- Bake BIM-to-FM data handover and CDE literacy into all curricula.
- **Add** AI/analytics for energy modules that use Swedish smart-meter/BMS datasets.
- Include industrialised timber workflows (DFMA, 4D/5D) and BEAst/PEPPOL basics.
- Target upskilling for BIM/DT managers, proptech analysts, and site digitisation leads—where demand is growing fastest.

### Circular Economy & Sustainable Construction Materials

- Principles and Practices

- **Regulatory pull:** Since Jan 1, 2022, new buildings must file climate declarations (A1–A5) using Boverket’s Klimatdatabas; government has tasked Boverket to introduce carbon limit values (gränsvärden)—earliest start was proposed for 2025 with further steps by 2028/2030. This is pushing early-stage design choices and product selection toward lower-carbon options.

- **Reuse infrastructure:** CCBUILD (IVL) provides inventories, a marketplace for reclaimed products, and tools that integrate with project workflows—lowering barriers to reuse at scale.
- **Public procurement:** The Upphandlingsmyndigheten issues circular criteria and guidance (e.g., for demolition, mass handling, packaging) so contracting authorities can require reuse, recycled content, and documentation.
- **Waste & selectivity:** Sweden targets high recovery of construction & demolition waste; Naturvårdsverket data show the sector generates a large share of national waste, keeping circularity a policy priority.
- **Digital enablers for circularity:** R&D (e.g., Smart Built Environment – Fenix) uses BIM + AI to identify reusable components and support material decisions. (Boverket 2022, Naturvårdsverket 2024)

- Sustainable Materials and their Application in Buildings

- **Mass timber (CLT/glulam):** Strong national capability and know-how (Svenskt Trä, Trästad Sweden) underpin widespread use in housing and public buildings.
- **Low-carbon concrete:** Industry guidance for klimatförbättrad betong (blended binders, optimization) is mainstreaming; roadmap targets neutral concrete by 2045 and product availability ~2030. Parallel plan: Cementa Slite CCS to capture ~1.8 MtCO<sub>2</sub>/yr by 2030.
- **Fossil-free steel:** SSAB is scaling hydrogen-based steel with a new Luleå mini-mill (target 2028)—relevant for structure and façade systems in low-carbon projects.
- **Material databases & certifications:** Byggvarubedomningen and SundaHus steer non-toxic, circular product choices; SGBC NoIICO2 sets whole-life carbon targets and baselines, increasingly used alongside Boverket rules. (Trafikverket 2022)

- Current qualifications and emerging job profiles

- **Skills baseline:** MYH's 2024 sector analysis flags needs in **circular construction, LCA/EPD, climate declarations, and digital competencies.**

#### Roles on the rise:

- **Återbrukssamordnare / Reuse coordinator** (pre-demolition audits, inventories, logistics, QA).
- **LCA/Climate-declaration specialist** (A1–A5 modeling, data governance via Klimatdatabas/EPDs)
- **Circular procurement specialist** (criteria setting, supplier due diligence).
- **Materials & product data manager** (BVB/SundaHus logbooks; compliance).
- **Design-for-disassembly engineer / Digital reuse analyst** (BIM-driven component tracking; AI tools like Fenix). (MYH 2024, Boverket 2022)

- Relevant market trends shaping the demand and supply

- **Tightening carbon governance:** Climate declarations are in place; limit values and broader scope are being prepared—creating steady demand for low-carbon and reusable products.
- **Procurement as a lever:** Public clients increasingly specify reuse/recycled content and documentation, scaling market readiness and supplier capabilities.
- **Investment & finance signals:** EU Taxonomy criteria for construction/real estate are influencing developers and lenders—rewarding projects with lower embodied carbon and robust data.
- **Supply-side innovation:** Rapid advances in timber, low-carbon concrete, CCS cement, and (near) fossil-free steel expand the materials toolkit for circular/low-carbon projects.
- **Data & transparency:** Widespread use of EPDs, Boverket's Klimatdatabas, and building-level certifications (e.g., NollCO2) standardise reporting and benchmarking across projects (Boverket 2022, Upphandlingsmyndigheten 2022).
- **Cross-Cutting Analysis & Opportunities**

#### Interlinkages and Synergies between the Thematic Areas

- **Whole-life carbon as the common spine.** EPBD (ZEB trajectory + GWP disclosure) and the EU Taxonomy pull the market toward measurable carbon outcomes; this directly links to **digitalisation** (BIM/DT for data capture), materials choices (timber, low-carbon concrete, fossil-free steel), and procurement (proof via EPDs, product databases).
- **Electrification + flexibility = value stack.** ETS2 pricing + SCF support electrify heat (HPs), PV and storage. Digital twins/IoT turn buildings into grid-interactive assets (demand response), enhancing the business case for smart O&M and new performance-based contracts.
- **Industrialised renovation at scale.** Renovation Wave targets pair naturally with off-site / DFMA methods guided by BIM (Sweden's timber modular know-how), cutting time on site, waste, and cost variance—while easing skills bottlenecks through more factory-centred workflows.
- **Finance-readiness meets data-readiness.** Taxonomy alignment depends on reliable evidence (LCA/LCC, energy KPIs); common data environments (IFC/fi2) bridge design→build→operate so assets stay financeable across their lifecycle.
- **Social equity built-in.** The Social Climate Fund's focus on vulnerable households aligns with affordable, efficient housing solutions and community-level retrofits; digital tools enable targeting, verification, and impact tracking.

#### Common Challenges and Barriers across Diverse European Regions

- **Policy transposition & permitting lag.** Uneven, evolving national rules (EPBD transposition, carbon limits, grid interconnection) slow planning and add developer risk.

- **Financing frictions & split incentives.** Condominiums and rental markets struggle to capture paybacks; SME contractors face working-capital gaps for industrialised methods and digital tooling.
- **Skills and capacity constraints.** Shortages in BIM–FM data, LCA/EPD, heat-pump installation/commissioning, and controls & analytics; site crews need upskilling for prefab/DFMA and safe handling of new materials.
- **Data fragmentation & interoperability.** Gaps between project BIM and FM systems; inconsistent use of open standards (IFC, fi2), product data (EPDs), and e-procurement schemas (BEast/PEPPOL).
- **Supply-chain volatility.** Price swings (energy, materials), limited availability of low-carbon cement binders, battery systems, or heat pumps in some regions; uneven access to reuse marketplaces.
- **Demand risk & consumer confidence.** Households weigh upfront costs and disruption; public clients vary in circular/low-carbon criteria maturity.

## Innovation Opportunities in VET for Sustainable Construction

### A. Data-to-decision skills (across the lifecycle)

- **BIM: FM Data Continuity Micro-credential.** Hands-on with CDEs, IFC/fi2, asset tags, and O&M handover; deliver a digital logbook ready for Taxonomy/EPBD evidence.
- **LCA/EPD & Climate-Declaration Bootcamp.** Applied A1–A5 modelling using EPDs and national databases; assign a materials substitution case that hits a project-level GWP target.
- **Energy Analytics for Operators.** From BMS/IoT data to fault detection, tariff-aware control, and demand response; include a heat pump + PV + storage lab in a digital twin.

### B. Industrialised renovation & circularity

- **DFMA / Off-site Retrofit Practitioner.** 4D/5D planning, laser scanning to prefab, on-site assembly sequencing, QA with digital checklists.
- **Reuse & Deconstruction Coordinator.** Pre-demolition audits, digital inventories (BIM-linked), **marketplace workflows**, documentation for procurement/compliance.
- **Low-carbon materials integrator.** Practical modules on timber detailing, klimatförbättrad betong specification, and (near) fossil-free steel use, with buildability and fire/acoustics basics.

### C. Electrification & prosumer operations

- **Heat-Pump Installer–Commissioner (advanced).** Hydraulics, refrigerants, smart controls, commissioning templates; integrate flexibility services (aggregator basics).
- **On-site PV & Storage Technician.** Design, safety, interoperability, monitoring; KPI dashboards aligned to performance contracts.

### D. Procurement, finance & compliance literacy

- **Green Public Procurement & Taxonomy for Practitioners.** Translating criteria into contracts; contractor documentation packs; audit-ready evidence.
- **Client-side Retrofit Coordinator (multi-owner contexts).** Decision support for HOAs/condominiums; phasing, cost-benefit under ETS2, and SCF/social tariffs.

## E. Programme design features to ensure uptake

- **Stackable micro-credentials** (EQF-referenced, ESCO-mapped) that combine into **job-ready profiles** (e.g., BIM/DT Manager, Reuse Coordinator, Energy Data Analyst).
- **Work-based learning with living labs** (municipal portfolios, campus buildings) where learners deliver **measurable** energy/carbon/reuse outcomes.
- **Digital toolchains included:** IFC/fi2 workflows, EPD software, e-procurement (BEAst/PEPPOL), and twin platforms—so graduates can “plug into” real projects day one.
- **Assessment by performance:** evidence packs (models, EPD calculations, commissioning reports) that mirror client deliverables.

## ● Conclusions and Recommendations for WP4

### Key Findings Summary and strategic Insights for Curriculum and Training Programme Design (direct recommendations for WP4)

#### 1 Policy is the prime mover

- The EPBD (2024) locks in a shift to zero-emission new buildings by 2030 and whole-life carbon (GWP) disclosure, pushing data-driven design and low-carbon materials.
- Renovation Wave, EU Taxonomy, ETS2 & Social Climate Fund, NZIA together steer capital, supply chains, and skills toward large-scale renovation, electrified heating, and verifiable sustainability performance.

#### 2) Market dynamics: short-term dip, long-term pull

- Cyclical slump (rates/costs) contrasts with structural demand for affordable, efficient homes.
- Electrification & rooftop PV keep expanding, though with near-term volatility (e.g., heat pump sales dip in 2024); medium-term growth pivots to retrofit solutions.

#### 3) Business models go “performance + data”

- Developers, owners, and lenders increasingly require taxonomy-aligned, evidence-rich assets (energy & carbon KPIs, EPD/LCA), enabling performance-based contracts and new service revenues (flexibility/demand response).

#### 4) Digitalisation is now essential infrastructure

- BIM/DT/IoT/analytics underpin predictive maintenance, energy optimisation, and industrialised renovation (DFMA, 4D/5D).
- Persistent BIM: FM handover gaps make CDE literacy and open standards (IFC/fi2) critical.

#### 5) Sweden's state of the art (Housing 4.0)

- BIM is de facto standard for major public clients (e.g., Trafikverket); BIM Alliance and Smart Built Environment drive national guidance.
- Active digital-twin pilots (building: district), smart-meter ubiquity, and timber-based industrialised housing show scalable pathways from design to factory to operation.
- Supply-chain standards (BEast/PEPPOL) streamline e-procurement and data exchange.

#### 6) Circularity & low-carbon materials accelerate

- x. Since 2022, climate declarations (A1–A5) and forthcoming carbon limit values are shifting early-stage design and product choices.
- y. Sweden's materials toolbox: mass timber (CLT/glulam), low-carbon concrete (on a CCS pathway), (near) fossil-free steel, plus product databases/certifications (BVB, SundaHus, NollCO2).
- z. Reuse infrastructure (CCBuild) lowers barriers to component recovery at scale.

#### 7) Cross-cutting synergies (and frictions)

- Whole-life carbon links policy → finance → digital → materials; industrialised renovation addresses cost, quality, and skills bottlenecks.
- Key frictions: policy/permitting lag, financing split incentives, skills shortages (BIM-FM data, LCA/EPD, HP commissioning, controls), interoperability gaps, and supply-chain variability.

#### 8) VET opportunities with the highest payoff

- Data-to-decision skills: BIM: FM data continuity; LCA/EPD & climate declarations; energy analytics (FDD, tariff-aware control, DR).
- Industrialised renovation & circularity: DFMA/off-site retrofit; reuse/deconstruction coordination; low-carbon materials integration.
- Electrification & prosumer ops: advanced heat-pump commissioning; PV+storage tech with KPI dashboards.
- Procurement & finance literacy: green public procurement, EU Taxonomy evidence packs, client-side retrofit coordination (e.g., HOAs).

#### 9) What to prioritise next (Excel4Housing)

- 14 Build stackable micro-credentials mapped to roles (BIM/DT Manager, Reuse Coordinator, Energy Data Analyst).

- 15 Anchor training in living labs (municipal/campus buildings) with measurable outcomes: GWP reduction, kWh/m<sup>2</sup>, peak-load shaving, reuse tonnage.
- 16 Standardise toolchains (IFC/fi2, EPD software, BEAst/PEPPOL, twin platforms).

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## Annex 11: State-of-the-Art National Report - Ukraine

# REPORT ON THE STATE OF THE ART

UKRAINE

# 1. Introduction

This State-of-the-Art Report provides an evidence-based overview of the Ukrainian construction sector and its vocational education and training (VET) system—taking into account current market dynamics, reconstruction needs, green and digital transformation trends, and workforce requirements. It aims to offer a clear analytical foundation for the design of VET curricula and training programmes under WP4 of the Exel4Housing project.

Methodology: desk-review of recent statistical data (2024–2025), analysis of industry reports, public data from the national statistics agency (construction output, employment, material production), and review of national and international reconstruction and education policy documentation.

# 2. Analysis Summary

In 2024, the total volume of completed construction work in Ukraine reached **UAH 204.7 billion**, marking a **23.5% increase** compared to 2023. (Interfax-Ukraine, 2025, March 27)

By January–July 2025, construction output rose further by **16.1%** compared to the same period in 2024 — reaching **UAH 117.7 billion**. (Interfax-Ukraine, 2025, September 29).

There is a growing need for a workforce capable of energy-efficient renovation, sustainable construction, and modern building technologies, which calls for modernized VET provision.

# 3. Indicative Outline

- **General Context: European Construction Sector & Energy Transition**

Ukraine's reconstruction after large-scale war damages demands alignment with EU energy efficiency and climate standards. The scale of reconstruction, renovation, and new construction is immense, placing construction and building-sector VET at the core of recovery efforts.

- **Policy and Regulatory Landscape**

Ukraine is gradually aligning national legislation and recovery frameworks with European standards: energy-efficient building codes, sustainability norms, and reconstruction strategies. The reconstruction agenda envisions large-scale modernization of housing, infrastructure, and public buildings with improved energy performance, climate resilience, and sustainability.

#### ○ **Overall Market Dynamics and Key Trends in Construction**

2024 growth in construction activity: total output at UAH 204.7 bn (+23.5% vs 2023) (BZNS media, 2025, March 31).

Breakdown (2024): residential construction — UAH 26.6 bn; non-residential — UAH 57.7 bn; engineering construction — UAH 120.4 bn. (Interfax-Ukraine, 2025, March 27)

In 7 months of 2025: overall output UAH 117.7 bn; building construction +27.7%; residential +12%; non-residential +36.4%. (Interfax-Ukraine, 2025, September 29)

These trends reflect intense reconstruction, renovation, and new investments — leading to increased demand for skilled labour, energy-efficient solutions, and modern construction practices.

Moreover, Ukraine's construction materials sector has significant potential: domestic production can cover up to 90% of reconstruction material needs — which could create up to ~180,000 jobs if fully mobilized. (Odessa Journal, 2024, August 12).

This indicates substantial opportunities for VET graduates across multiple trades: construction, energy-efficiency works, materials processing, and supply-chain roles.

#### ○ **Impact of Green and Digital Transitions on the Broader Construction Sector**

The convergence of reconstruction demand, sustainability, European alignment pushes Ukraine's construction sector toward:

Energy-efficient practices: thermal insulation, modern windows/doors, efficient roofs, using of photovoltaic power systems, maintenance of internal engineering systems, installation of heating and renovation to “green building” standards.

Ukraine significantly intensified its integration into the European Green Deal during 2020–2025, establishing this framework as the foundation for the transition to a climate-neutral economy, improved energy efficiency, and the development of green infrastructure. As early as 2020, Ukraine and the EU agreed on joint energy and climate priorities within a strategic partnership, which included alignment with the principles of the European Green Deal (European Commission, 2020).

The first official Ukraine–EU meeting dedicated to the implementation of the Green Deal and Ukraine's green transition was held in 2021. This dialogue consolidated the policy framework for further decarbonization and sustainable recovery (European Commission, 2021). In 2023, a strategic partnership was signed to advance renewable gases—particularly hydrogen and biomethane—which are essential for green energy and energy-efficient construction (State Agency on Energy Efficiency, 2023).

The year 2025 marked the beginning of the official screening of Ukrainian legislation under the “Green Agenda and Sustainable Connectivity” cluster. This process signifies large-scale harmonization of national regulations with EU eco-requirements and standards, including those related to energy-efficient and sustainable buildings (Government Office for Coordination of European and Euro-Atlantic Integration, 2025). The “Green Transition Report for Ukraine,” published the same year, identified specific priority directions for green transformation, among them the modernization of the construction sector (Government Office, 2025).

Sustainable material supply: leveraging domestic materials, circular economy principles, waste recycling and reuse

Digitalization: increased use of digital design tools (BIM), digital planning and permitting, remote monitoring, smart building technologies — especially relevant given war risks and reconstruction scale.

Thus, the green and digital transitions significantly raise requirements to workforce skills and training quality, reinforcing the need for modernized VET.

- **Thematic Analysis of State-of-the-Art**

- **Digitalization in Construction (Housing 4.0)**

Digitalization is crucial for transparency, efficiency, and meeting high energy performance targets.

**Key Digital Technologies in Demand:** BIM, digital planning, building energy modelling, remote surveying (drones), IoT-based building monitoring, smart energy systems.

**Current Adoption:** Larger firms and reconstruction contractors increasingly adopt digital tools; public-procurement projects push for digital compliance; demand rising for digital-construction specialists.

**Emerging and Required Professions:** BIM Technician, Digital Construction Technician, Smart Building/Energy Systems Installer, Unmanned aircraft systems operators, Digital Quality Control Specialist.

Given reconstruction needs and EU-aligned standards, demand for these profiles is expected to grow rapidly.

### ○ **Circular Economy & Sustainable Construction Materials**

Material Production Potential: Ukraine's industry can supply ~90% of reconstruction material needs, which could support ~180,000 jobs under full mobilization. (Odessa Journal, 2024, August 12).

Sustainability Focus: Emphasis on use of local materials, recycling rubble, promoting sustainable building materials, and reducing reliance on imports — critical during wartime and for cost-efficiency.

Required Skills & Professions: Eco-material Technicians, Waste-management specialists, Sustainable Construction Installers, Quality Control for recycled materials.

These trends highlight the growing relevance of circular economy skills for VET.

### ○ **Modernization of VET in Construction (Ukraine)**

VET reform is a strategic priority to meet reconstruction and market needs. A flagship initiative is the **#100 Workshops Project**.

#### **The “100 Workshops” Initiative**

Government-led, under the Ministry of Education and Science of Ukraine 73 modernized/ new training workshops across the country, 5 workshops dedicated to construction trades Funded by the European Union under the **Ukraine Facility Plan**.

#### **Establishment of the Training and Practical Centre “Energy-Efficient Construction”**

At the **Sumy High Vocational School of Construction and Design** a new centre will be created as part of #100 Workshops. Its key roles:

Deliver short-term and modular training programmes for construction trades, focused on energy efficiency and modern building technologies.

Bridge labour market gaps by preparing specialists for reconstruction, renovation, insulation works, and sustainable building tasks.

Provide flexible learning formats (online, evening, daytime) to accommodate diverse groups — including retraining adults, veterans, displaced persons, or those seeking career change.

Promote inclusion by offering targeted support for persons with disabilities, veterans, and vulnerable groups.

#### **Planned Training Programmes**

1. Window and door systems installer
2. Thermal insulation installer
3. Flat roof installer
4. Advanced Building Thermomodernization Systems Technician
5. Decorative plastering and airless painting technician

These programmes correspond to high-demand trades in reconstruction, energy efficiency, and renovation — aligning with market trends and sustainability goals.

Thus, VET modernization via this initiative contributes directly to national reconstruction, energy-efficiency targets, and creation of a skilled workforce.

- **Cross-Cutting Analysis & Opportunities**

- **Interlinkages and Synergies**

Green building ↔ sustainable materials ↔ domestic materials production ↔ job creation

Digitalization (BIM, smart building) ↔ efficiency, reconstruction speed, quality control

VET modernization (100 Workshops) ↔ labour market demand ↔ social inclusion ↔ reconstruction capacity

- **Common Challenges & Barriers**

Shortage of qualified labour despite high demand

Lack of standardized national legislation / norms for sustainable materials, circularity, digital construction practices

Regional disparities in VET infrastructure and access

Urgent need to update curricula and provide flexible training formats

- **Innovation Opportunities in VET for Sustainable Construction**

Modular, stackable micro-credentials in energy efficiency, digital construction, sustainable materials

Dual education / apprenticeship models with reconstruction companies

Remote / blended learning for theory + hands-on labs

Inclusive training pathways for vulnerable / displaced / veteran populations

- **Conclusions and Recommendations for WP4**

- **Key Findings**

The Ukrainian construction sector is growing rapidly — **2024 saw +23.5% output growth**; further growth in 2025.

Reconstruction and renovation needs remain enormous, driving demand for energy-efficient, sustainable, and modern construction practices.

Domestic material production has significant potential (~90% of reconstruction needs), offering job creation and supply-chain stability.

Digitalization and circular economy trends create demand for new professional profiles and competencies.

The #100 Workshops initiative provides a critical framework to modernize VET, meet labour demand, and support reconstruction.

- **Recommendations for WP4 Curriculum & Training Design**

1. Develop modular VET programmes (micro-credentials) in: energy renovation, insulation, roofing, efficient window/door installation, decorative and finishing works.
2. Include digital construction skills: BIM, digital design, smart building technologies, material tracking.
3. Embed sustainable materials & circular economy principles in curricula (reuse, recycling, eco-materials).
4. Design inclusive training paths: part-time, evening, online, for veterans / displaced / adults changing career.
5. Establish partnerships with local industry and reconstruction companies to ensure demand-driven training and employment pathways.
6. Monitor labour market demand regularly and update curricula accordingly.

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## List of Abbreviations and Acronyms

| Abbreviation / Acronym | Full Term                                                          |
|------------------------|--------------------------------------------------------------------|
| AKMI                   | Partner Name - implied                                             |
| ARCA                   | Architettura Comfort Ambiente (Italian wood certification)         |
| BIM                    | Building Information Modelling                                     |
| CAM                    | Criteri Ambientali Minimi (Italian minimum environmental criteria) |
| CE                     | Circular Economy                                                   |
| CEAP                   | Circular Economy Action Plan                                       |
| CEEC                   | Partner Name - implied                                             |
| CLT                    | Cross-Laminated Timber                                             |
| COM                    | European Commission Communication                                  |
| CSRD                   | Corporate Sustainability Reporting Directive                       |
| CTE                    | Código Técnico de la Edificación (Spanish National Building Code)  |
| DfD                    | Design for Disassembly                                             |
| DNSH                   | Do No Significant Harm (Principle)                                 |
| EACEA                  | European Education and Culture Executive Agency                    |
| EC                     | European Commission                                                |
| EPC                    | Energy Performance Certificate                                     |
| EPBD                   | Energy Performance of Buildings Directive                          |
| ERASMUS                | EU Programme                                                       |
| ESRS                   | European Sustainability Reporting Standards                        |
| ESG                    | Environmental, Social, and Governance                              |
| ETS2                   | Emissions Trading System 2                                         |
| EU                     | European Union                                                     |
| FCRBE                  | Facilitating the Circulation of Reclaimed Building Elements        |
| GEG                    | Buildings Energy Act (Germany)                                     |
| GHG                    | Greenhouse Gas                                                     |
| HE                     | Higher Education                                                   |

| Abbreviation / Acronym | Full Term                                                                 |
|------------------------|---------------------------------------------------------------------------|
| HVAC                   | Heating, Ventilation, and Air Conditioning                                |
| JRC                    | Joint Research Centre (European Commission)                               |
| LCA                    | Life Cycle Assessment                                                     |
| LCC                    | Life Cycle Costing                                                        |
| LVL                    | Laminated Veneer Lumber                                                   |
| MEPS                   | Minimum Energy Performance Standards                                      |
| NBRP                   | National Building Renovation Plan                                         |
| NFRD                   | Non-Financial Reporting Directive                                         |
| NWE                    | North-West Europe                                                         |
| NZEB                   | Nearly Zero-Energy Building                                               |
| PEX-COVE               | Partnerships for Excellence - Centres of Vocational Excellence            |
| PMP                    | Project Management and Data Control Plan                                  |
| PNEC 2030              | National Energy and Climate Plan 2021–2030 (Portugal)                     |
| PV                     | Photovoltaic                                                              |
| R&D                    | Research and Development                                                  |
| RRP                    | Recovery and Resilience Plan                                              |
| SPU                    | Special Public Use (Dissemination Level)                                  |
| TCFD                   | Task Force on Climate-related Financial Disclosures                       |
| TOTEM                  | Tool for Optimising the Total Environmental impact of Materials (Belgium) |
| VET                    | Vocational Education and Training                                         |
| WBL                    | Work-Based Learning                                                       |
| WLC                    | Whole-Life Carbon                                                         |
| WP                     | Work Package                                                              |
| ZEB                    | Zero-Emission Building                                                    |

**Table 2. List of abbreviations and acronyms**

