



Construction sector

Assessment of national renovation strategies

In the framework of the Energy Efficiency Directive, the EU Joint Research Centre (JRC) carried out an assessment to analyse national renovation strategies to see if countries comply with the building energy efficiency legislation. In total, 74% of the national strategies address the requirements of the Directive satisfactorily and 10 of them are considered exemplary.

Countries with the lowest compliance were Austria, Belgium, Bulgaria, Poland, Portugal, Sweden and Germany.

The JRC classifies ten strategies, such as France, Spain and the UK, as “fully compliant”.

The overall result of the analysis was very positive, taking into consideration that these were the first renovation strategy documents submitted by the Member States. The strategies will be revised by Member States in 2017, and every 3 years thereafter.

[Joint Research Centre - Analysis of national renovation strategies](#)

IIGCC calls for binding nZEB building targets by 2050

The [Institutional Investors Group on Climate Change published their position](#) on the review of EU’s energy policies. The paper states that strong political certainty and binding targets for all buildings to be ‘nearly zero energy’ by 2050 will generate investments.

Furthermore, IIGCC also supported the proposals to make energy performance certificates mandatory for all buildings and to use in the future electronic Energy Performance Certificates (EPC) that can be updated throughout a building’s life-cycle.

IIGCC only asked for EPC that cover both design and operational performance of buildings.

Steel industry: Commission issues measures to safeguard the sector

On 16 March, the European Commission issued a [Communication titled Steel: Preserving sustainable jobs and growth in Europe](#). In its Communication, the Commission acknowledged the importance of energy prices to the steel industry and stressed a number of existing and future plans to help avoid competitive disadvantage with non-EU countries.



The Commission stated, that Member States have agreed to continue free allocation of EU emission trading scheme allowances to 2030 in order to protect the iron and steel industries.

EU ETS system under scrutiny

Environmental NGO Sandbag published a study on the emissions trading scheme and European cement sector entitled [“Cement - The Final Carbon Fatcat - How Europe’s cement sector benefits and the climate suffers from emissions trading flaws.”](#) The report says that perverse incentives for free allocation actually lead to profits for the cement sector and increase their emissions.

[CEMBUREAU, the European Cement Association](#) denied Sandbag’s claims in a [press release](#) issued on 16 March and stated *“The ever recurring mantra on overallocation ignores that the cement industry has always called for an allocation closer to production and will continue to do so.”*

At the same time, the European Cement Association added that the industry *“partly share the views of Sandbag such as the need for innovation funding to stimulate breakthrough technologies, a closer alignment between allocation and production in the form of a dynamic allocation and a stronger recognition of the role of alternative fuel and raw material use in emission reductions, with the inclusion of a landfill ban on recoverable and recyclable raw materials.”*

Furthermore, CEMBUREAU also reacted to a possible new “four-tier system” for more targeted distribution of free allowances to the most at risk sectors. In its press release, it explains that such a system indeed would distort the market and create discrimination among sectors. It said *“a tiered approach risks introducing unclear and unverifiable criteria to distinguish between sectors, and may therefore be discriminatory and open to legal challenge.”*

Moreover, the industry association asks for a revision of the auctioning/free allowance of shares in order to allow the best performers to receive full free allocation.



Live from the European Union

Impact assessment of circular economy is necessary

On 29 February, during the Competitiveness Council, several ministers requested an impact assessment concerning the European Commission's circular economy strategy. It was said, that the package must be assessed for cost effectiveness and for potential administrative burden on businesses.

The success of the circular economy package is indeed lies in its implementation and it is crucial that businesses and industry find opportunities and cost-effective solutions. It was also agreed to take into account the different stages in the transition to a circular economy among Member States.

Furthermore, the Council also discussed the importance of deepening and strengthening the EU's Single Market.

The [conclusions of the Competitiveness Council](#) will be submitted to the Environment Council (June).

Environment Council backs new Ecodesign rules

On 4 March, at the [Environmental Council](#), ministers expressed a strong support for product design rules (Ecodesign) that promote durability, repairability and reusability and stated that it should be a top priority for the circular economy strategy.

Member States called on the Commission to publish the delayed Ecodesign and energy labelling work programme.

The majority of countries also welcomed the Commission's initiative to develop quality standards for secondary raw materials.

Some countries named green public procurement as an effective instrument.

[Presidency note for Environmental Council](#) (22/02/2016)

OECD study concludes that heavy industries are slightly hurt by environmental regulations

A recent [OECD study](#) has concluded that environmental policy has only a small impact on the competitiveness of high-polluting industries.

The study looks at the trade of manufactured goods between 1995-2008 and assesses the impact of environmental controls. The study argues that businesses are less likely to spend millions of euros in pursuit of a territory with more relaxed environmental standards when probably all countries will strengthen their climate policies in the coming decades.



According to the study, globalisation, market size and market conditions, furthermore workforce quality and changes to trade tariffs were “much more likely” to hinder competitiveness than environmental policy changes.

CE Delft study on calculation of additional profits of sectors and firms from the EU ETS

The study by consultants [CE Delft for NGO Carbon Market](#) calculated the [additional profits that sectors and companies have made from the EU ETS](#) from 2008 to 2014, in addition to the costs avoided from receiving free allowances.

The study finds that some industries have done this in three ways: by selling surplus allowances; by buying cheap international offsets to comply with targets before selling free allowances on the EU market; and by passing on the “non-existent” carbon cost of free allowances to consumers.

In 2013, the European Commission found no direct evidence of leakage in the EU between 2005 and 2012.

The EU is currently working on reforms to the ETS for the period 2021-30, but the Commission has made clear that the policy of free allocation will continue for the most at-risk sectors.

The European Parliament is currently drafting its position on the Commission’s ETS reform proposals, with a first draft to be put to the environment committee in June 2016.

European Commission holds stakeholder conference on energy efficiency

On 14 March 2016, the European Commission's Directorate General for Energy organised a [Stakeholders' Event](#) on the upcoming reviews of the [energy efficiency Directive \(2012/27/EU\)](#) (EED) and the [energy performance of buildings Directive \(2010/31/EU\)](#) (EPBD).

The Commission has recently finalised the evaluations of both Directives while work on the impact assessments is still ongoing.

The aim of the event was to discuss the findings of these evaluations, possible policy options and ways forward for the energy efficiency Directive - in the morning session - and for the energy performance of buildings Directive - in the afternoon session.

At the beginning of the conference, the Commission announced that a new formal proposal will be published in September 2016 for the EPBD.

The conference started with the evaluation of the EED and Article 1 and 3, about energy efficiency target. Several policy options are still open such as the nature of the target (absolute final energy, energy intensity, primary energy or final primary energy). A lot of stakeholders expressed their support for a binding 40% target but at the same time



advocated for taking into account the technical feasibility. Additionally, the Commission noted the remarks concerning the importance of avoiding policy overlaps and cost-effectiveness.



As for Article 6 on Public procurement, the Commission's evaluation suggested not to revise Article 6 at this stage, because of lack of data and reference scenarios.

There were a lot of discussions on Article 7 (Energy Efficiency Obligation Schemes and alternative measures) however main conclusions were not made.

Metering and billing (Articles 9-11) were suggested to be too early to review this year. However some comments were made such as:

- Role of smart metering should be clarified, it provides information but without a tool
- Importance of behaviour change - the fact that smart metering helps to measure energy use, it will not reduce it
- Energy classes need to be combined with indoor comfort

The afternoon session continued with the evaluation of the EPBD.

The Commission's aim is to help to increase the renovation with a long-term vision (2030-2050). The evaluation was based on several criteria such as efficiency, effectiveness, relevance, coherence and EU added value. The evaluation showed that its framework is appropriate and that the directive achieved its goals in terms of new high performance buildings, but lagging behind in renovation of existing buildings.



The main problem definition is that:

- the building stock shows only a slow transformation
- Insufficient links between building codes and financing
- No clear forward looking vision beyond 2020 for existing buildings
- Need for better data and financing
- Low demand for investments in the absence of tailored-made financing products

The possible policy options were presented:

- Improve implantation by enforcement , simplification
- Renovation roadmaps with a clear 2030-2050 vision
- Reinforce the links between building codes and financing (Energy Performance Certificates- EPCs)

When it comes to the determination of the energy performance of buildings, the main problem is that the market information is not sufficiently reliable. Amongst others, the two most crucial problems are that indicators do not reflect always all efficient solutions and that one building can get different energy performance.

The policy option proposed by the Commission is enforcement, as follows:

- 1 building = 1 energy performance
- Efficient systems adequately covered by all methods
- Calibration of the asset rating with reality

Additionally, the Commission equally proposed the clarification of the calculation framework (Annexe 1) and the development a framework for disclosure.



Stakeholders responded to the options presented and underlined the importance of technology neutral approach and supported the building level scope (no extension of the scope). Escaping overlapping regulations such as energy audits and EPCs were mentioned as well.

Furthermore, it was also noted that buildings should be enabled to participate in different energy systems (green or grey), and that indoor comfort of buildings is key priority as well (next to energy efficiency).

When talking about the minimum energy performance requirements, the Commission stated that the cost-optimal methodology is effective, but its effectiveness is hampered by several factors such as slow implantation timeline and the lack of enforcement of minimum requirements. Furthermore, the 2030-2050 vision for renovation of existing buildings is missing.

Presented policy options were:

- Clarify (accelerate) timeline for implementing cost-optimal levels both existing and new buildings beyond 2020
- Long-term individual renovations schemes linked to financing schemes
- 2030-2050 vision to be set.

It was also clarified that the EPBD aims to increase the rate of renovation and not the depth of the renovation.

As for EPCs, it was mentioned that the aim is to create a demand-driven market and there is a need to increase reliability and confidence in EPCs.

Presented policy solutions were:

- Increase quality and reliability of EPCs
- Introduce better information for all building owners and tenants
- Streamline vision on regular inspections and alternative systems
- Incentivise systems that make buildings smart-ready.

Next steps of the Commission include ongoing impact assessment, the evaluation to be adopted by the Regulatory Scrutiny Board (April 2016). New legislative proposal will be published in September 2016.



National Award Winner Projects

Concrete Student Trophy 2015 - Austria

The Concrete Student Trophy has been organised in Austria. The project definition: describe a preliminary design of a barrier-free concrete bridge over the „Alte Donau“ in Vienna for pedestrians and cyclists within the framework of the proposed urban-planning development. The solutions have to include the left and the right river bank, areas for recreational activities (e.g. sports, cultural events), parking lots and traffic zones.



All the winners - Concrete Student Trophy 2015

Furthermore, candidates shall not only develop a good idea with respect to architecture, but it is also necessary to make calculations and develop building procedures, due to the main goal of the CST: architects and civil engineers must learn to work hand in hand. The students furthermore have to present detailed descriptions and models for visualisation. The sophisticated solutions presented by the students were highly appreciated by the members of the jury, consisting of architects, civil engineers, representatives of the building and cement industries as well as the municipal authorities of Vienna.

The first (€ 4000.-) prize was awarded to a team of the Vienna University of Technology, two second prizes (€ 3000.- each) went to students of the Vienna University of Technology as well as to the Technical University in Graz. In addition two teams won appreciation awards of € 1000.- each.



Winning Project: „Birnerschweb” (Dominic Mimlich, Christopher Emil Kreminger and Nikola Markunovic)



Winning Project: „Birnerschweb”

The winning team was able to convince the jury with a concept, which at first sight appears simple and pragmatic but then turns out to be smart and sophisticated. Paying much attention to details like the handrail-design which enhance the bridge's construction and at the same time it reduces the size of its structure. Furthermore, a pump station was also developed to run-off the rain water. They also managed to improve the traffic routes for pedestrians and cyclists and the banks of the Danube with new inviting rest areas.

Second price project: „BOU” (Kolo Fischbach, Philippe Jans and Nora Hammelmann)





„BOU“ is an arch bridge with a very slender structure which is captivating. Though the jury was questioning the need of such a landmark in the surrounding of the „Alte Donau“. Reviewing the structure there’s also a lot of potential for optimization concerning the creative and the technical construction methods (e.g. building the arch with pre-cast segments instead of cast-in-place concrete).

The other second price project: „na thései“ (Jakob Gigler, Sebastian Reiter, Markus Kaindlstorfer, Maximilian Rieger)

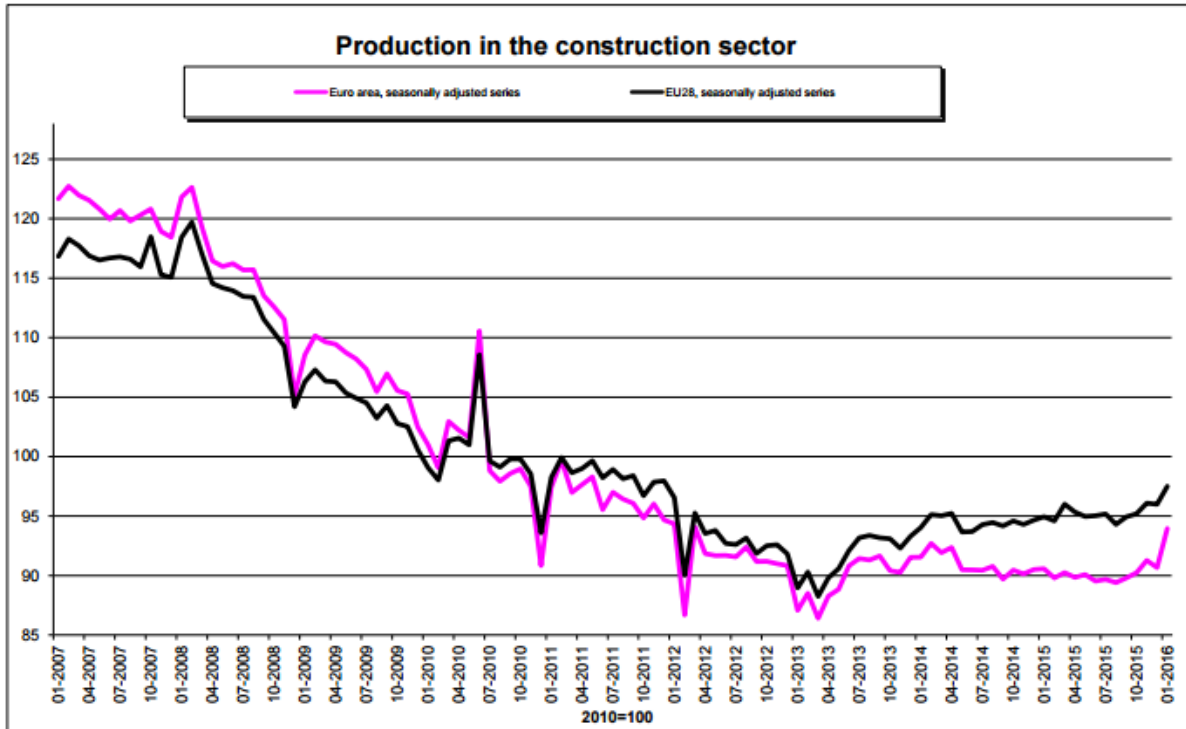


Second price project: „Na thései“

„Na thései“ is the only project which doesn’t differentiate between the bridge and the landscape. Its concept is innovative and integral, the team created a whole new topography with seating-accommodations and interesting circulation areas. The bridge’s massive construction, its height and especially the bridge bearing were put into question by the jury. According to the jury’s opinion, it’s expedient to use the island as an abutment, but the idea should have been developed further.

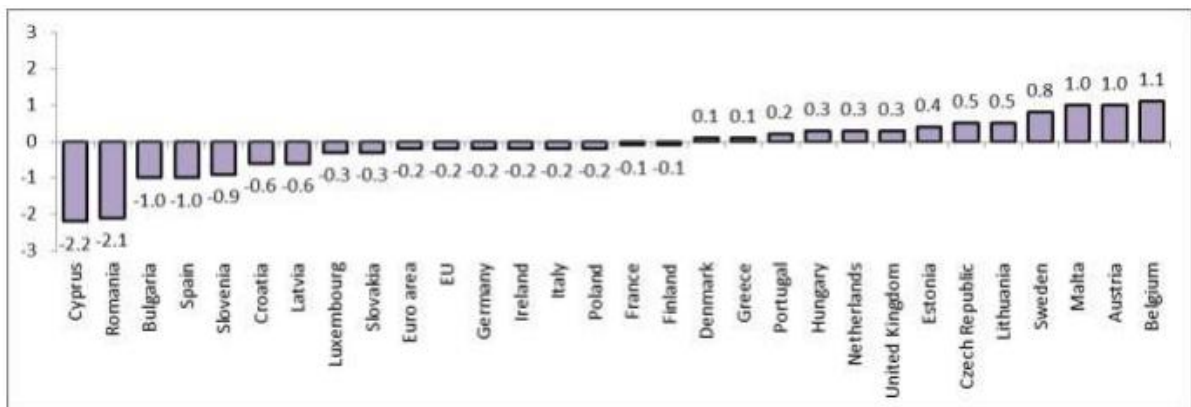


News in brief



Graph 1- Production in Construction (pink - Euro Area, Black - EU28)

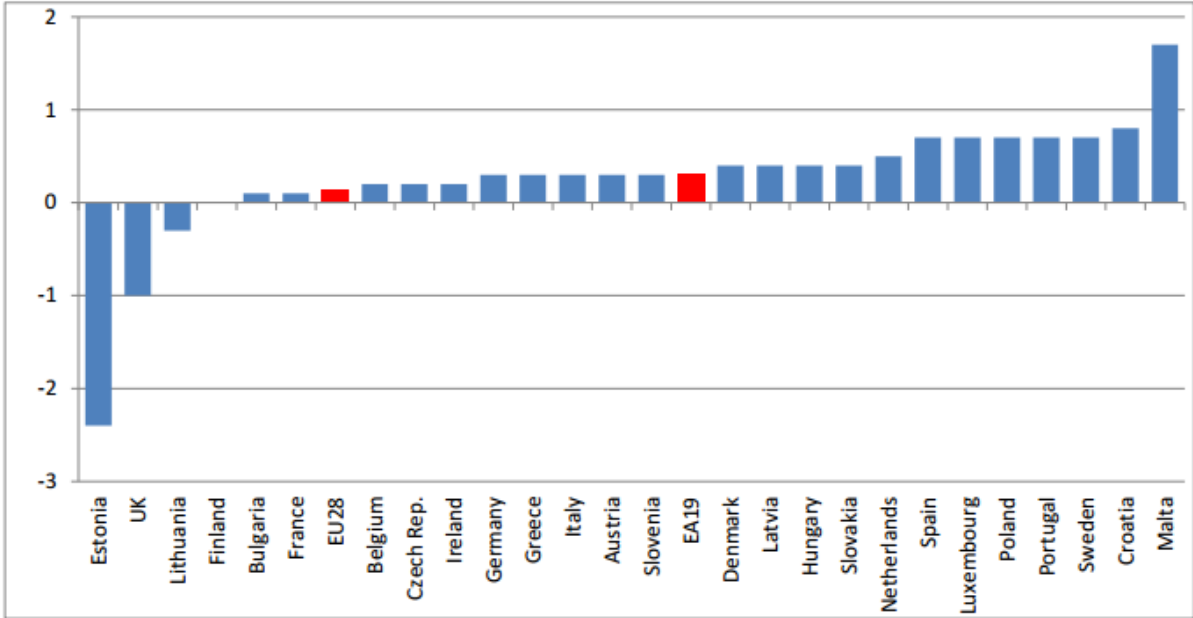
According to first estimates from Eurostat, the statistical office of the European Union, in January 2016 compared with December 2015, the seasonally adjusted production in the construction sector increased by 3.6 % in the euro area (EA19) and by 1.6% in EU28.



Graph 2 - Annual inflation rates (%) in February 2016, in ascending order

Annual inflation was -0.2% both in the Euro area and in EU 28. The lowest annual rate was registered in Cyprus (-2.2%), while the highest annual rate was recorded in Belgium (1.1%).

*Data for United Kingdom are for January 2016



Graph 3 - Member States' growth rates for employment in the fourth quarter of 2015 - % change over the previous quarter, seasonally adjusted

The number of persons employed increased by 0.3% in the euro area (EA19) and by 0.1% in the EU28 in the fourth quarter of 2015 compared with the previous quarter.

* *Cyprus and Romania: data not available*



Agenda

APRIL

15 April 2016

Notified Bodies SG 13

tbd

19 April 2016

BIBM Board meeting

Brussels, Belgium

21 April 2016

CEN/TC 229/WG 1

Brussels, Belgium

MAY

3 May 2016

BIBM Communication Commission

Cologne, Germany

4 May 2016

CEN/TC 104/TG 20

Paris, France

10-11 May 2016

CEN/TC 104/SC 1

London, UK

11-12 May 2016

CEN/TC 104

London, UK

10 May 2016

Fire Safe Europe Task Force

Lund, Sweden

20 May 2016

Concrete Initiative

Brussels, Belgium

24 May 2016

CPE TG CPR implementation

Brussels, Belgium

26-29 May 2016

IPHA Congress

Budapest, Hungary

JUNE

6-7 June 2016

BIBM General Assembly

Birmingham, UK

15-16 June 2016

NEPSI Council meeting

Brussels, Belgium

To the Newsletter of Construction Products Europe (former CEPMC), please follow [this link](#).

To read the Newsletter of CEMBUREAU, please follow [this link](#). You can also subscribe directly following this link <http://www.cembureau.eu/newsletter/subscriptions>.

To read the Quarterly Newsletter of The Concrete Initiative, please follow [this link](#).

List of Acronyms:

AhG - Ad-hoc Group

CPE - Construction Product Europe



DG GROW - Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs

ECP - European Concrete Platform

EMA - European Masonry Alliance

IPHA - International Pre-stressed Hollowcore Association

TF - Task Force