



EUROPEAN CONSTRUCTION
INDUSTRY FEDERATION

ANNUAL REPORT

2019



€ 1,427
BILLION

Total construction in 2018 (EU28)

9.0%
OF GDP

14.8
MILLION WORKERS

Multiplier effect:
1 person working in the
construction industry

≈
2 further persons working
in other sectors*

43.7%
OF GROSS FIXED CAPITAL
FORMATION

3.3
MILLION ENTERPRISES
95% are SMEs with fewer than
20 and 93% with fewer than 10
operatives

6.4%
OF EUROPE'S TOTAL EMPLOYMENT

29.0%
OF INDUSTRIAL EMPLOYMENT

* source: Study for the
European Commission
(DG EMPL) 'Monitoring
of sectoral employment'
(VC/2010/0064 - 2012)

27
COUNTRIES

31
MEMBER FEDERATIONS

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FULL REPORT ONLINE

WWW.FIEC-AR.EU



FIEC INITIATIVES

Campaigns

- Campaign “More EU budget for transport – the best Investment Plan for Europe” - www.moreeubudget4transport.org
- Partner in the OSHA (European Agency for Health and Safety at Work) Campaign on “Healthy Workplaces - Manage Dangerous Substances” - www.healthy-workplaces.eu
- Partner of “BUILD UP” (“The European Portal for Energy Efficiency in Buildings”) - www.buildup.eu

Projects

- FIEC-EFBWW website on “Construction for youth” - www.construction-for-youth.eu
- Partner in “SKILLCO - Skills sector alliance for transfer of knowledge and skills of VET workforce in construction” - www.skillco.eu
- Skills Blueprint for the Construction Industry - twitter.com/EUConstruction
- BIM-Speed - www.bim-speed.eu

FIEC PARTNERSHIPS



- Social Partner in the European Sectoral Social Dialogue of the Construction Industry together with EFBWW (European Federation of Building and Woodworkers) - ec.europa.eu/social/



- Cooperation with EIC (European International Contractors) for activities beyond Europe's borders - www.eic-federation.eu



- The European founding member of CICA (Confederation of International Contractors' Associations) - www.cica.net



- Participant in the ECF (European Construction Forum) - www.ecf.be



- Member of EHF (European Housing Forum) - www.europeanhousingforum.eu



- Partner Organisation of CEN (European Committee for Standardisation) - www.cen.eu



- Member of ECCREDI (European Council for Construction Research, Development and Innovation) - www.eccredi.org



- Member of the European Construction, built environment and energy efficient building Technology Platform - www.ECTP.org

FOREWORD



Kjetil Tønning

FIEC President

“The construction sector is the essential partner to deal with today’s challenges: building sustainable and climate resilient infrastructure creating “zero energy” buildings and smart/digital cities; and equipping existing workers with new skills whilst attracting young people into a modern, innovative industry, giving them an exciting long-term career with prospects. The construction industry will provide the appropriate solutions for better living and working environments, mobility and economic growth in Europe.”



For full interview check



FIEC STEERING COMMITTEE 2018-2020



- | | | | | | |
|---|--|--|---|--|---|
| 1. Kjetil Tonning , NO President | 4. José Michaël Chenu , FR Vice-President TEC (FR) | 6. Stefano De Marinis , IT Vice-President Competitiveness (IT) | 8. María Ángeles Asenjo , ES Vice-President MEDA (ES) | 10. Philip Crampton , IE Vice-President Communication (PT-IE) | 12. Emre Aykar , TR Vice-President CICA (TR) |
| 2. Thomas Bauer , DE Vice-President ECO (DE) | 5. Alexander Pongratz , AT Vice-President Treasurer (AT) | 7. Michail Daktylidis , GR Vice-President ECF (CY-GR) | 9. Lars M. Carlsen , DK Vice-President (DK, FI, NO, SE) | 11. Lubomir Katchamakov , BG Vice-President SME (BG, CZ, EE, HU, HR, LT, LV, RO, SI, SK) | 13. Philippe Dessoy , BE Vice-President EIC President |
| 3. Paul Depreter , BE Vice-President SOC (BE-LU-NL) | | | | | |

FIEC TEAM



Ulrich Paetzold
Director General

Christine Le Forestier
Director Economic & Legal Affairs (ECO)

Domenico Campogrande
Director Social Affairs (SOC)

Sue Arundale
Director Technical and Environmental Affairs (TEC)

Yasmina Koeune
Assistant

Joëlle Caucheteur
Assistant

Sylvie Masula
Assistant (-02/2019)

Muriel Lambelé
Accountant

MILESTONES 2018-2019



For full timeline
check [FIEC-AR.eu](https://www.fiec-ar.eu)



Christian Tridon speaks about infrastructure maintenance at EP Intergroup on “Long-term Investment”, 25/9/2018

- FIEC response to the public consultation on the review of the Construction Products Regulation (CPR)
- Proposed European Services Card rejected by EP Internal Market Committee

APRIL 2018

- Workshop on Smart Readiness Indicator (SRI), which was introduced in the revision to the Energy Performance in Buildings Directive (EPBD)
- Intervention of Domenico Campogrande in the EESC hearing on the ELA - European Labour Authority
- FIEC welcomes the 2017 public procurement package but recalls some problems and good practices

MAY

- Adoption of the new “Posting” Directive 2018/957/EC
- Meeting with MEP J. Lenaers (NL-EPP), Rapporteur for the ELA (European Labour Authority)

JUNE

- FIEC proposes amendments to Digital Europe Programme, to lobby for the inclusion of construction as a specific sector
- FIEC President a keynote speaker at the World Summit on Digital Built Environment, Helsinki
- Workshop on the Coordination and Support Action DT-ICT-13-2019, for an EU data platform for construction
- Event on infrastructure maintenance within the European Parliament’s Intergroup on long-term investment, co-organised by FIEC

SEPTEMBER



Kjetil Tønning as keynote speaker at the World Summit on Digital Built Environment (Helsinki)



FIEC Manifesto for EU Term 2019-2024

- Study on “Supporting digitalisation of the construction sector and SMEs”. FIEC involved in feedback session
- Joint meeting of the FIEC and EFBWW boards

- FIEC President Kjetil Tønning speaker at EU industry Days, CEMBUREAU event
- Kick-off meeting of the Skills/ Construction “Blueprint” project

- Launch of FIEC MANIFESTO for EU Term 2019-2024
- Presentation by FIEC President of our main priorities (see the Euractiv video)
- Final conference of the FIEC-EFBWW project on “Mental health in construction”

- ECCREDI communication on Horizon Europe
- Revision of the “Driving times” and “Tachograph” Regulations: FIEC and EBC welcome breakthrough agreement reached in the European Parliament

JANUARY
2019

FEBRUARY

MARCH

APRIL

ECO



Thomas Bauer, DE
President



Christine Le Forestier, FIEC
Director ECO

WORKING GROUP "INFRASTRUCTURE & FINANCING":



Dominique Bouillot, FR
Chairman



Vincent Piron, FR
Vice-Chairman



Christian Tridon, FR
Vice-Chairman

WORKING GROUP "PUBLIC PROCUREMENT":



Jan Wierenga, NL
Chairman

WORKING GROUP "EU CONTRACT LAW":



Helmut Miernik, DE
Chairman

"Driving times" and "Tachograph" Regulations

In May 2017, as part of the 1st mobility package, the European Commission proposed to revise the rules on certain social aspects in road transport (i.e. driving times and rests), linked to the use of (digital) tachographs on board.

In principle, such burdensome and costly rules do not apply to construction companies' drivers and light trucks.

However, in some countries, the legislation is applied more extensively and includes "construction drivers", as though they belong to the transport industry.

FIEC, in cooperation with EBC (European Builders Confederation), advocated for the extension of the existing exemptions, because construction companies are small mobile factories covering a limited perimeter, rather than road transport companies. In specific cases, they also transport perishable goods (i.e. ready-mixed concrete), which are clearly not to be treated as "normal" merchandise.

The Council included a derogation for vehicles transporting ready-mixed concrete in its position and the European Parliament extended the existing exemption, as well as included a new possible derogation for heavier construction vehicles.

Question is what will come out of the trilogue negotiations.

Public procurement

The current legislative framework setting the rules for public procurement are the 3 directives adopted in 2014 (2014/23/EU on concessions, 2014/24/EU on “classical” procurement and 2014/25/EU on “utilities” procurement). These rules aim at ensuring that public procurement procedures are transparent and fair.

As the 2014 directives include provisions on the development of electronic procurement, the European Commission has set up an Experts group on Electronic Procurement (EXEP), in order to help the implementation of these rules at national level.

In October 2017, the European Commission also published a package of mostly soft law measures aimed at helping with the implementation of the directives. It namely promoted the “strategic use” of public procurement, as well as the professionalisation of public procurers.

Historically, FIEC has always been very much mobilised on this issue which is crucial for construction companies in terms of business opportunities.

Since its creation, FIEC actively participates in the EXEP. As regards to the 2017 package, FIEC broadly welcomed these measures, especially the professionalisation of public buyers, but was more sceptical about the strong promotion of “strategic procurement” (i.e including innovative, green and social/societal criteria). These latter criterias are not clearly defined and sometimes diverge significantly from the traditional principle of purchasing for the best value for money.

Infrastructure maintenance

Since early 2018, FIEC has focused on the crucial issue of the maintenance of transport infrastructure. Indeed, in all EU countries, we can observe that post-war transport infrastructure (and typically concrete bridges) are in bad shape, but very little is done at national level to preserve these key assets for EU's competitiveness and EU's citizens safety.

FIEC advocates that part of the EU financing dedicated to transport infrastructure should also cover the needs for maintenance, renovation and upgrade of these infrastructure (i.e. in the framework of the Connecting Europe Facility, the InvestEU programme, etc.). However, this is not only a question of financing. The maintenance issue is very much under the competence and responsibility of Member States. In these circumstances, FIEC's priority is to raise awareness at the highest possible political level on this issue and help collect information on the state of the road network (i.e. bridges) in order to assess the real needs and eventually the actions which would be required.

For further details on ECO actions and key dates, refer to www.FIEC-AR.eu



SOC



Paul Depreter, BE
President



Domenico Campogrande, FIEC
Director SOC



Jakob Krohn-Rasmussen, DK
Chairman Vocational Training (SOC-1)



Cristina García Herguedas, ES
Chairman Health and Safety (SOC-2)



Michel Gili, FR
Chairman Employment (SOC-3)

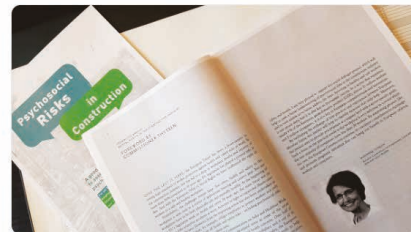
Psycho-social risks in the construction industry

In 2017 the EU sectoral social partners for the construction industry FIEC, representing the employers, and EFBWW (European Federation of Building and Wood Workers), representing the workers, in cooperation with the AEIP (the European Association of Paritarian Institutions) started a project, co-financed by the European Commission, called "Psycho-Social Risks in the Construction Industry".

Psychosocial risks and work-related stress are among the most challenging - and growing - occupational safety and health concerns and the EU "Framework" Directive (89/391/EC) sets a legal obligation for employers to protect workers from all workplace risks, including psycho-social risks.

However, psycho-social risks are complex and multidimensional issues and there is an evident lack of tools and guidance for employers on how to take them into account adequately in their risk assessment.

The aims of the project were therefore to exchange best practices and map prevention tools and methodologies that exist in various Member States and on that basis to develop guidelines to help employers have greater understanding on dealing with such risks at the workplace.



Vous, European Building & Wood Workers Federation, EU Social et 2 autres

Foreword of EU Commissioner Marianne Thyssen supporting the project

“Blueprint” project



In 2018 a project entitled “Skills Blueprint for the Construction Industry” was officially launched. It gathers a consortium of 24 partners, including FIEC, from 12 different countries and is coordinated by the “Fundación Laboral de la Construcción” from Spain.

The project is co-financed by the Erasmus+ programme and its main aim is to develop a long term alliance between the concerned stakeholders (employers, workers, training centres, public authorities) for a better anticipation of the skills needed in the construction industry and to ensure a corresponding adaptation of the training schemes.

It will focus on 3 key areas: digitalisation, energy efficiency and circular economy.

In most of the Member States construction companies are facing difficulties in finding the right workers with the right skills.

This can be explained by the rapid technological changes, including the digitalisation of construction processes through BIM (Building Information Modelling) and other digital tools or methods (automation, drones, Internet of Things, etc.), by policy choices, such as “greener” economies and initiatives on energy efficiency in buildings, as well as by demographic changes, notably the ageing of the workforce.

The aim of this initiative is to develop and implement a new strategic and coordinated approach (“Blueprint”) to sectoral cooperation on skills by enhancing the responsiveness of vocational education and training (VET) systems, at all levels, to the construction labour market needs. In other words, it aims at identifying existing and emerging skills needed in order to translate them into vocational curricula responding to those needs.

For further information: www.constructionblueprint.eu

Revision of the Posting Directive

The “Posting” Directive defines the rules that apply when a company provides services, for a limited period, in a country other than the one where it usually operates. As the provision of services is temporary, some of the rules that apply are the ones of the “host” country (minimum wage, working time, health and safety,...), whilst others (for example “Social security”) remain the ones of the “home” country.

The European Commission presented a proposal for revising the original “Posting of Workers” Directive (96/71/EC) with the aim to address the problem of unfair practices and to promote the principle that the same work at the same place should be remunerated in the same manner.

Amongst the main changes proposed by the Commission we can highlight : the reference to “remuneration” instead of “minimum wage”; a limitation in time (max 12 months, plus 6 possible additional months) beyond which the terms and conditions of employment that are mandatorily applicable to workers will be the ones of the Member State where the work is carried out; a clarification of the rules applicable to the reimbursement by the employer of the expenditures incurred on account of the posting, such as on travel, board and lodging.

Approximately half of the postings within the Internal Market are in construction activities and therefore these new rules can have a significant impact for construction companies.

For further details on SOC actions and key dates, refer to www.FIEC-AR.eu



TEC



José Michaël Chenu, FR
President



Sue Arundale, FIEC
Director TEC



Jan Coumans, BE
Chairman Directives,
Standards and Quality
Assurance (TEC-1)



Thierry de Séverac, FR
Chairman Research,
Development and
Innovation (TEC-2)



Lennart Henriz, SE
Chairman Environment
(TEC-3)

European Council for Construction Research Innovation and Development (ECCREDI)

The European Council for Construction Research, Development and Innovation (ECCREDI) was created in Brussels on 19 December 1995 with the signing of a Memorandum of Understanding by representatives of European federations concerned with construction, in its widest sense. The aim of ECCREDI is to contribute to the competitiveness, quality, safety and environmental performance of the construction sector and to the overall sustainability of the built environment – all urban and transport infrastructures – by advocating for effective construction research, technological and process development and innovation. ECCREDI adds value as a European council that connects its members and establishes areas of common interest, for which joint action is more successful than isolated approaches from individual members.

FIEC is a member of ECCREDI and currently holds the presidency. FIEC is able to achieve more by pooling its resources with ECCREDI members, than by acting alone. The priority for the current year is to ensure that Horizon Europe (the next research framework programme) contains adequate opportunities for contractors. Specifically, FIEC has co-signed a communication, which asks for a Co-programmed European Partnership for the Built Environment and Construction.

Construction Products Regulation (CPR)

The Construction Products Regulation (CPR) regulates the placing on the EU market of construction products. Amongst other things, CE Marking is applied to products in the framework of harmonised standards and a Declaration of Performance is required to accompany the product.

The CE Mark in the context of the CPR is widely misunderstood and contractors need more information than is provided in the accompanying Declaration of Performance. Over the years, FIEC has been lobbying for improvements to protect contractors from the legal uncertainty that exists and there have been discussions regarding a possible revision of the CPR. The form that this might take has been the subject of many meetings and several studies have been undertaken, including one in 2018 on EU rules for products used in the construction of buildings and infrastructure works. At the time of writing, no conclusions have been reached about the future of the CPR, so FIEC's work on this matter continues.

Energy Performance of Buildings (EPBD)

Directive (EU) 2018/844 of 30 May 2018 amending Directive 2010/31/EU on the energy performance of buildings and Directive 2012/27/EU on energy efficiency. The EPBD is the EU's main legislative instrument promoting the improvement of the energy performance of buildings within the EU.

Buildings are responsible for approximately 40% of energy consumption and 36% of CO₂ emissions in the EU. Currently, about 35% of the EU's buildings are over 50 years old and almost 75% of the building stock is energy inefficient, while only 0.4-1.2% of the building stock is renovated each year. Therefore, more renovation of existing buildings has the potential to lead to significant energy savings. Investments in energy efficiency can stimulate the construction industry. SMEs would particularly benefit from a boosted renovation market, as they contribute more than 70% of the value added in the EU building sector. Now that the amended Directive has been adopted, FIEC's main objective is to follow the development of the Smart Readiness Indicator (SRI) and lobby accordingly. FIEC has joined recent stakeholder meetings and has participated in a task group, which looked at the value proposition of the SRI.

<https://smartreadinessindicator.eu/>



For further details on TEC actions and key dates, refer to www.FIEC-AR.eu



CONSTRUCTION 4.0

Construction 4.0 Working Group

FIEC launched a BIM Working Group in 2016, to tackle the subject of Building Information Modelling and its impact on contractors in the EU. This group quickly became a working group focused on the wider aspects of digitalisation, under a new name, the “Construction 4.0 Working Group”.

The main aim of this group is to follow relevant policy developments, inform member federations and select priority issues for more in depth research and discussion, in order to develop our positions.

Digitalisation

<https://www.bim-speed.eu/en>



COMPETITIVENESS – “CONSTRUCTION 2020”



High Level Forum meeting on 4/4/2019, Brussels (© European Commission)

“The construction industry is very important to the EU economy. The sector provides 18 million direct jobs and contributes to about 9% of the EU’s GDP. It also creates new jobs, drives economic growth, and provides solutions for social, climate and energy challenges. The goal of the European Commission is to help the sector become more competitive, resource efficient and sustainable.” (DG GROW). Following Commission VP Tajani’s preview at the FIEC Congress 2012 in Istanbul, actions were addressed in the High-Level Forum, 5 Thematic Groups and studies: 1 Stimulate investment; 2 Skills & Qualifications; 3 Sustainable use of natural resources; 4 Internal Market; 5: International competitiveness. Currently, discussions focus on priorities for a possible follow-up action from 2020.”

This is the only EU action specifically focusing on the the construction sector and its stakeholders in a holistic manner, across the different Commission DGs involved. Consequently, FIEC and its national Member Federations contributed actively to all actions, discussions and studies. Despite all positive results, further improvement is necessary, both concerning the coordination of various DGs and the choice of priorities. For this reason, the FIEC Manifesto asks for a Commission VP mandated to ensure such coordination. Concerning the priorities, FIEC and their colleagues from other European federations participating in the European Construction Forum are developing a set of requests and recommendations for the attention of the Commission and other EU institutions.

“CHINA CHALLENGE”

JOINT FIEC-EIC ACTIONS

Following the “COVEC” case in Poland (2009-2011), the activities of Chinese state-owned construction enterprises in and around the EU have reached new dimensions with the “Belt and Road Initiative” (BRI) and the budgets involved. Also the so-called “16+1” meetings and the “Budapest principles”, touching upon all spheres of life must be taken into consideration.

Recent examples of EU-financed construction contracts awarded to abnormally low tenders submitted by consortia led by Chinese SOEs (e.g. in Croatia, Bulgaria) show the need for a comprehensive EU strategy in favour of fair competition in practice. It seems the approach of the EU and the Member States has changed into this direction.

Chinese finance practices in other continents, particularly Africa, show that this systematic deviation from internationally agreed principles has negative consequences.

FAIR COMPETITION ON OPEN MARKETS

In order to avoid any misunderstanding, FIEC and EIC would like to reiterate that they are firmly opposed to any form of protectionism and are in favour of fair competition in mutually open markets. Fair and healthy competition, based on contract conditions which allocate risks in a balanced way, contributes to progress and innovation. On the other hand, unfair and unhealthy competition, based on unbalanced conditions and the lowest price only, endangers the EU economy and society.

FIEC and EIC are in favour of genuinely reciprocal market access opportunities and corresponding incentive measures (i.e. trade defence instruments) at EU level, if international negotiations do not achieve tangible progress.



FIEC Press Conference
20/6/2018, FIEC President
and DG present the FIEC/
EIC position on the issue.



CONSTRUCTION MANIFESTO

EU TERM 2019-2024

1

INVESTING IN A
COMPETITIVE
EUROPE

2

ENSURE
A **LEVEL**
PLAYING FIELD

3

CONSTRUCTION 4.0:
ACCELERATE THE **DIGITAL**
TRANSFORMATION OF THE
CONSTRUCTION INDUSTRY

4

CONSTRUCTION **PRODUCTS**
REGULATION (CPR):
ENSURE THAT IT WORKS IN
PRACTICE

5

COMMITTING TO THE
SOCIAL DIMENSION OF
THE CONSTRUCTION
INDUSTRY

6

BUILD A
SUSTAINABLE
EUROPE

7

SINGLE POINT OF
COORDINATION
IN THE EU
COMMISSION



EUROPEAN CONSTRUCTION
INDUSTRY FEDERATION



EUROPEAN
INTERNATIONAL
CONTRACTORS

FIEC MEMBER FEDERATIONS

| | | | | | |
|---|---|--|---|---|--|
|  |  Bundesinnung Bau | www.bau.or.at |  |  EVOSZ | www.evosz.hu |
|  |  Die Bauindustrie | www.bau.or.at |  |  CONFEDERATION OF BUILDING INDUSTRY | www.cif.ie |
|  |  Confederatie Bouw Confédération Construction | www.confederationconstruction.be |  |  ASSOCIAZIONE NAZIONALE COSTRUTTORI EDILI | www.ance.it |
|  |  KBS | www.ksb.bg |  |  LĀTVIJAS BŪVUZŅĒMĒJU PARTNERĪBA | www.statybinikai.lt |
|  |  ΟΜΟΣΠΟΝΔΙΑ ΣΥΝΔΕΣΜΩΝ ΕΠΙΧΕΙΡΗΣΕΩΝ ΟΙΚΟΔΟΜΗΣ ΚΥΠΡΟΥ | www.osek.org.cy |  |  GROUPEMENT DES ENTREPRENEURS | www.latvijabuvnieki.lv |
|  |  ASSOCIATION OF BUILDING ENTREPRENEURS OF THE CZECH REPUBLIC | www.sps.cz |  |  Bouwend Nederland The Dutch construction and infrastructure federations | www.grouperment.lu |
|  |  DIE DEUTSCHE BAUINDUSTRIE BAUEN UND SERVICES | www.bauindustrie.de |  |  EBA NORWEGIAN CONTRACTORS ASSOCIATION | www.bouwendnederland.nl |
|  |  ZENTRALVERBAND DEUTSCHER BAUWERKE | www.zdb.de |  |  Byggenæringens Landsforening | www.eba.no |
|  |  dansk byggeri | www.danskbyggeri.dk |  |  BNL | www.bnl.no |
|  |  Eesti Ehitustevõtjate Liit | www.eeel.ee |  |  FEPICOP | www.fepicop.pt |
|  |  Confederación Nacional de la Construcción | www.cnc.es |  |  ARACO ASOCIATIA ROMANA A ANTREPRINZILOR DE CONSTRUCȚII National Association of ROMANIAN CONTRACTORS | www.araco.org |
|  |  Confederation of Finnish Construction Industries | www.rakennusteollisuus.fi |  |  SVERIGES BYGGINDUSTRIER | www.sverigesbyggindustrier.se |
|  |  FFB FEDERATION FRANÇAISE DES BÂTIMENTS | www.ffbatiment.fr |  |  Gospodarska zbornica Slovenije Chamber of Commerce and Industry of Slovenia | www.gzs.si |
|  |  LES TRAVAIUX PUBLICS | www.fntp.fr |  |  IZSPS | www.zsps.sk |
|  |  ΠΕΔΕΜΕ | www.pedmede.gr |  |  TURKISH CONTRACTORS ASSOCIATION | www.tmb.org.tr |
|  |  HUP | www.hup.hr | | | |

Associate members



www.effc.org



www.eqar.info

Member of



www.cica.net

CICA report available online
www.FIEC-AR.eu



In close Cooperation with



EUROPEAN
INTERNATIONAL
CONTRACTORS

www.eic-federation.eu

EIC report available online
www.FIEC-AR.eu



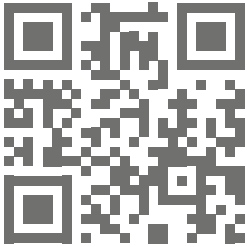


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SME
 CONSTRUCTION 4.0
 COMPETITIVENESS
 GROWTH
 ENERGY NETWORKS
 EMPLOYMENT
 CONSTRUCTION IS THE SOLUTION INDUSTRY
 YOUTH EMPLOYMENT
 RESOURCE EFFICIENCY
 DIGITALISATION
 JOBS
 SKILLS TRAINING/EDUCATION
 CLIMATE CHANGE
 RECYCLING
 SOCIAL INFRASTRUCTURE
 WATER NETWORKS
 ENVIRONMENT
 TRANSPORT INFRASTRUCTURE
 IT-NETWORKS
 ENERGY EFFICIENCY
 ENERGY PRODUCTION
 STANDARDISATION
 INFRASTRUCTURE
 INNOVATION
 BIM

