

EUROPEAN CLUSTER CONFERENCE 2020

10-11 NOVEMBER 2020 | BRINGING TOGETHER THE CLUSTER COMMUNITY

Ecosystem session: CONSTRUCTION

Clusters strengthening ecosystems



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European Cluster Conference 2020

Industrial ecosystems: Construction

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

11 Nov. 2020 – Antonio Paparella, Circular Economy and construction

The ecosystem approach to Community industrial policy

- The communication ["A new industrial strategy for Europe"](#):

"ecosystems encompass all players operating in a value chain: from the smallest start-ups to the largest companies, from academia to research, service providers to suppliers".

- The communication ["Europe's moment: Repair and Prepare for the Next Generation"](#):

"The pandemic has served to reaffirm the interdependence of our economies and the importance of a fully functioning Single Market. [...] Our industrial ecosystems are increasingly integrated and connected. Research, engineering, manufacturing, assembly and servicing often take place in different parts of Europe, and allow businesses to be more competitive and focus on what they do best. This will be exactly what is needed for Europe's recovery".

The ecosystem approach in practice

- Ecosystems as **networks** rather than (value) chains:
 - Trace the complex links across firms, sectors and institutions.
 - Ecosystems include both **public and public** activities.
 - Public institutions and research centres as key actors in their interactions with firms.
 - Ecosystems **evolve** continuously.
 - Not meant as a fixed and discrete unit of observation.
-

Why the ecosystem lens?

- Highlights **interdependencies** between Member States.
- Identifies efficiency bottlenecks and **Single Market** shortcomings.
- Takes into account the **regulatory context**.
- **Dynamic** concept and (attempted) real time measurement.

Industrial Ecosystems in Europe

- Social enterprises, associations and cooperatives aiming at generating a social impact, often proximity based

- Retail sales
- Wholesale connected to consumers

- Construction, maintenance, refurbishment and demolition of buildings and infrastructure (e.g. transport infrastructure, utilities)
- Manufacturing of products and equipment
- Other related services (e.g real estate activities)

- Telecommunication
- Software and programming
- Web portals
- Manufacturing of computers and equipment

- Pharmaceutical products and equipment
- Hospitals, nursing homes, residential care

- Plant and animal production
- Processing of food
- Veterinary activities

- Electric motors, engines and turbines
- Electric power generation
- Manufacturing and distribution of gas

- Passenger transport and travel
- Hotels, short term accommodation
- Restaurants and catering
- Events, theme parks

- Newspapers, books and periodicals
- Motion picture, video and television
- Radio and music

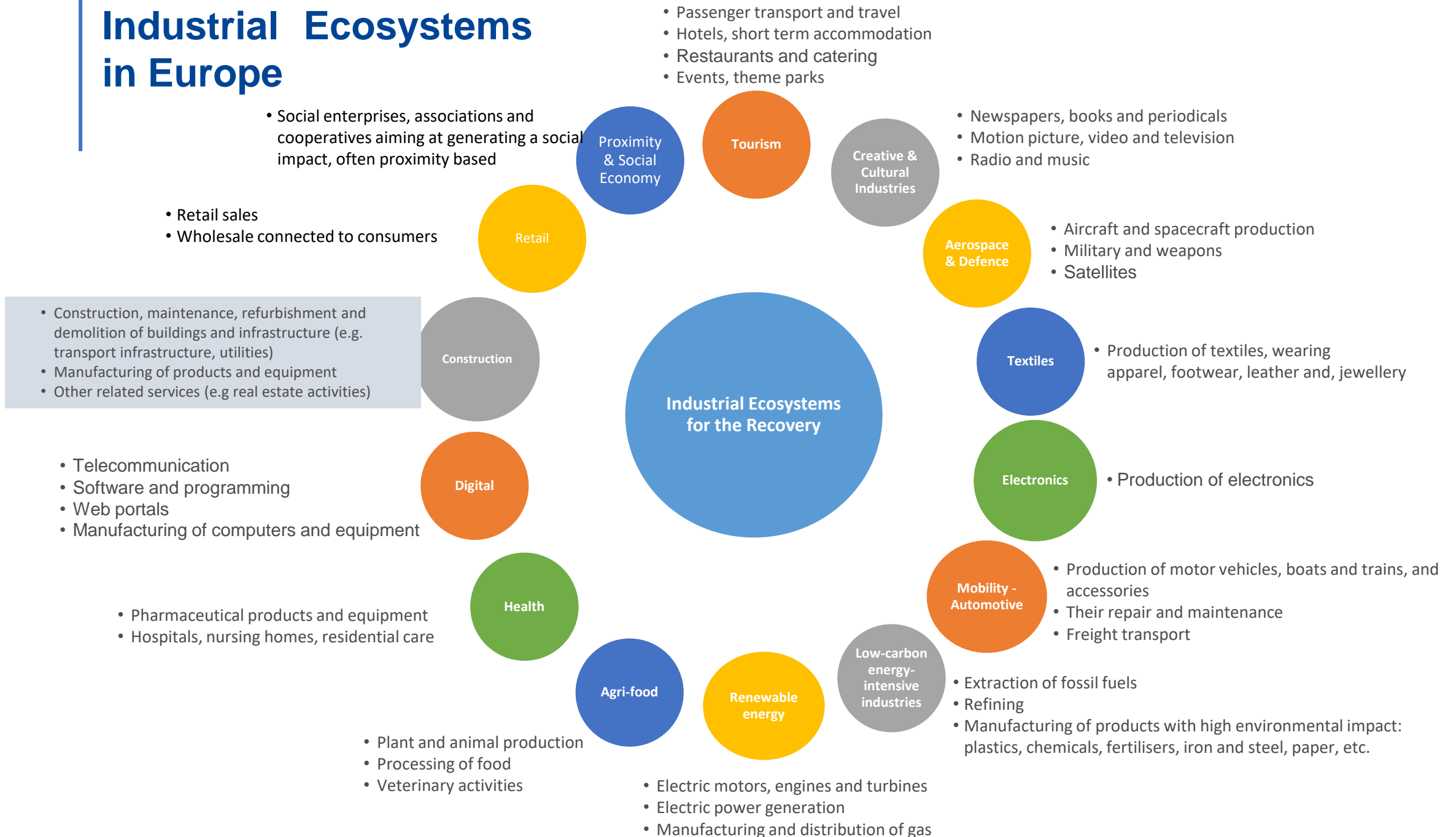
- Aircraft and spacecraft production
- Military and weapons
- Satellites

- Production of textiles, wearing apparel, footwear, leather and, jewellery

- Production of electronics

- Production of motor vehicles, boats and trains, and accessories
- Their repair and maintenance
- Freight transport

- Extraction of fossil fuels
- Refining
- Manufacturing of products with high environmental impact: plastics, chemicals, fertilisers, iron and steel, paper, etc.



Construction ecosystem

5_{mil}
businesses

10.5%
of EU GDP

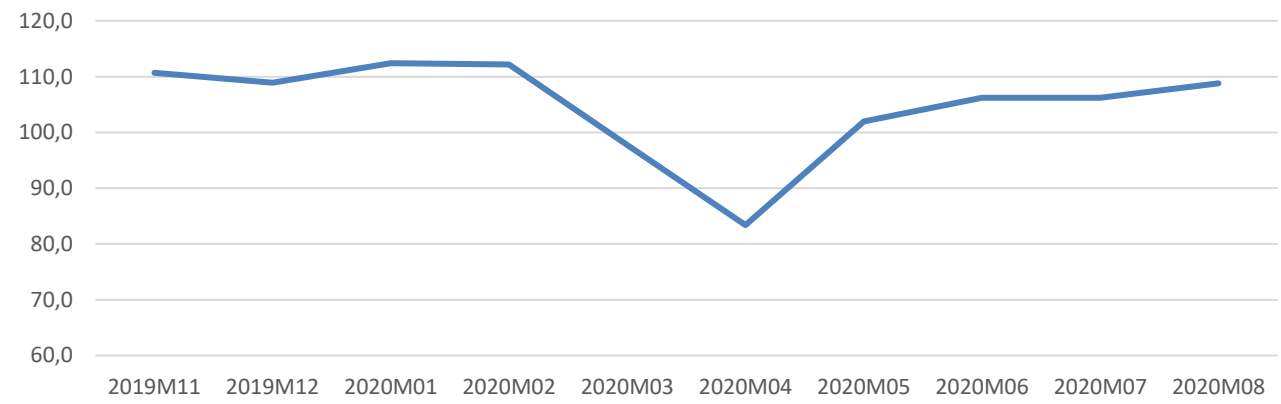
2.4
trillion
Output in the
EU

99%
SMEs

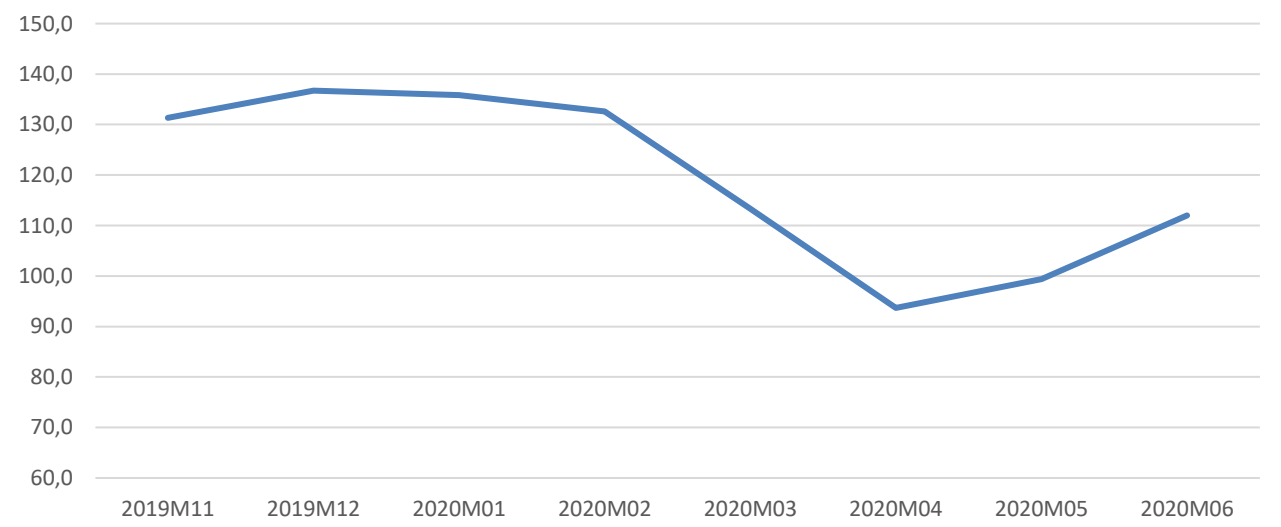


Health bulletin

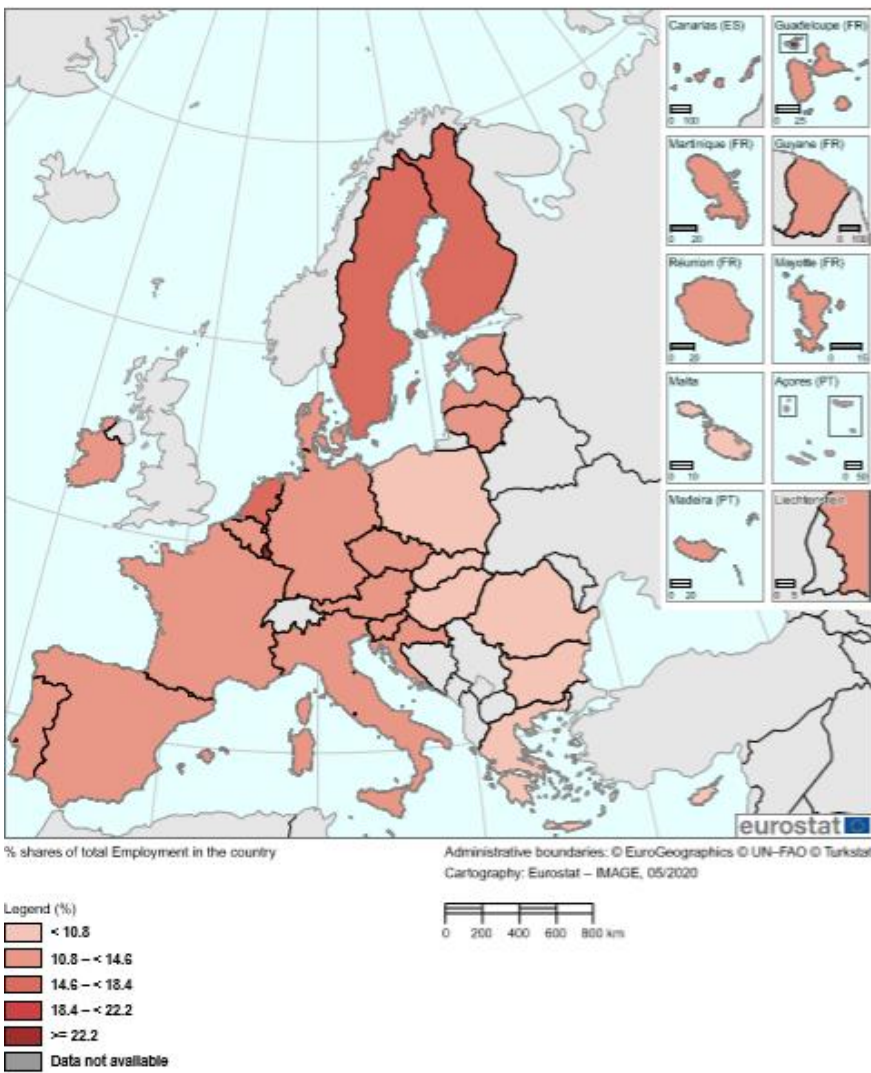
EU 27 monthly volume of production in construction (index 2015=100, calendar and seasonally adjusted)
source: Eurostat STS



EU 27 Residential Building permits (index 2015=100, calendar and seasonally adjusted)
Source: Eurostat STS



"Constructions" ecosystem as a share of total Employment in the country
EU27





Renovation Wave, central points

Investments and support to increase the percentage and quality of building renovations and their affordability.

Modernise the construction sector.

Promoting the digitization of buildings and the construction sector.

Promoting the circular economy and informing citizens on sustainability issues.

Other EU Initiatives

- Circular Economy Action Plan (March 2020)
- Pact for Skills (July 2020)
- Financial support for building renovation: the Recovery and Resilience Facility, the Just Transition Mechanism, Cohesion funding, InvestEU, LIFE, Horizon Europe and the Modernisation Fund.
- The European Commission is identifying priorities per Member States for investments and reforms, to help guide negotiations with Member States, assuring EU and national priorities are addressed and aiming for consistency of Recovery and Resilience Plans between Member States.

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Construction ecosystem – the contribution of the Sustainable Habitat Cluster

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The Cluster...

Sustainable Habitat Cluster formally recognized since **2009** as a **Competitiveness Cluster** in **Portugal**;

Member of ECCP has achieved the ESCA **Gold Label** in 2015 and renewed it in 2018;



VISION: "Sustainability as the driving force for innovation and competitiveness"

OBJECTIVES:

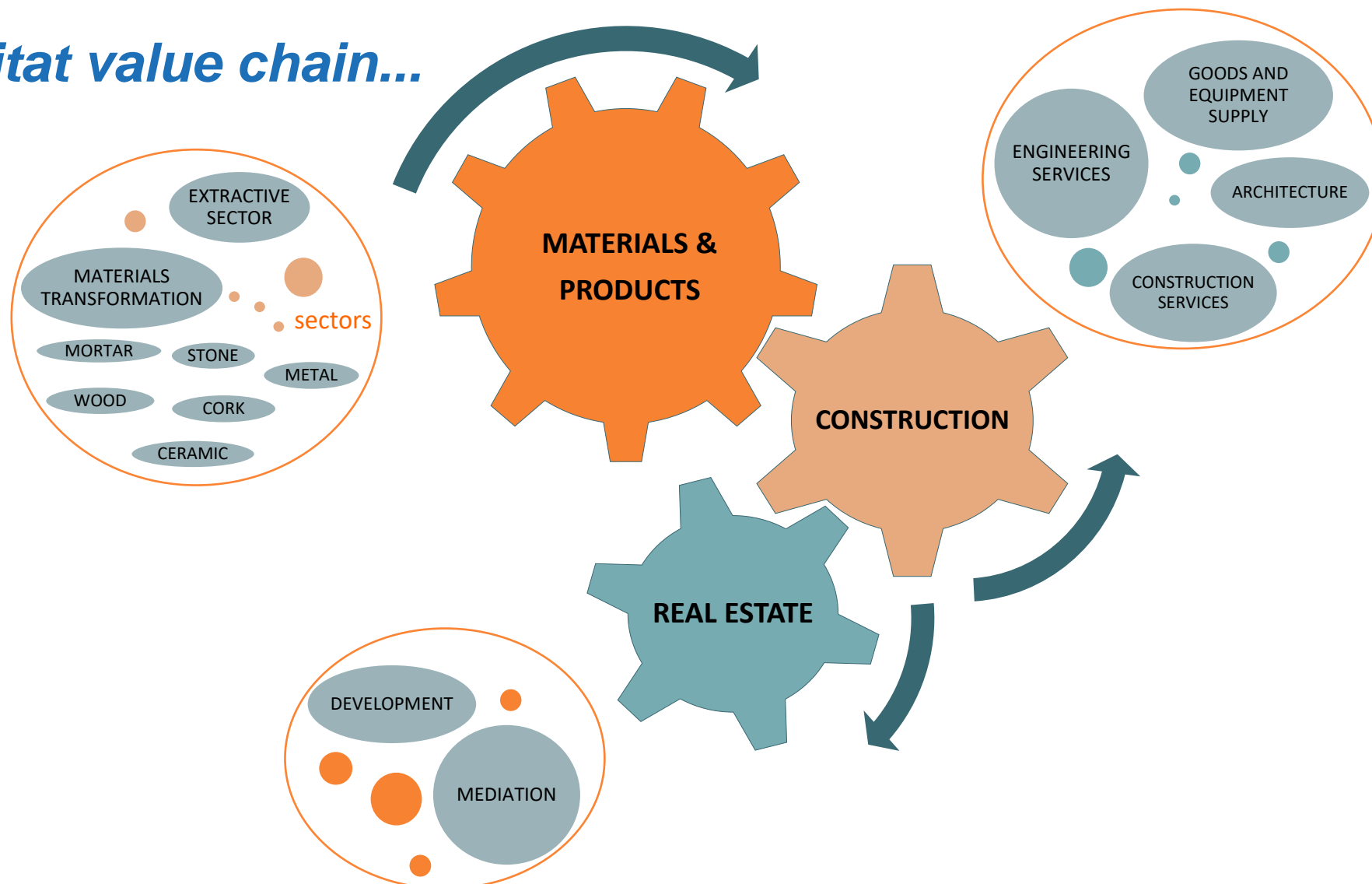
- *Promote Innovation and Competitiveness*
- *Create business opportunities*
- *Promote cooperation in internacionalization*
- *Develop skills and competences within the Cluster*
- *Foster new areas of business and entrepreneurship*

Habitat value chain

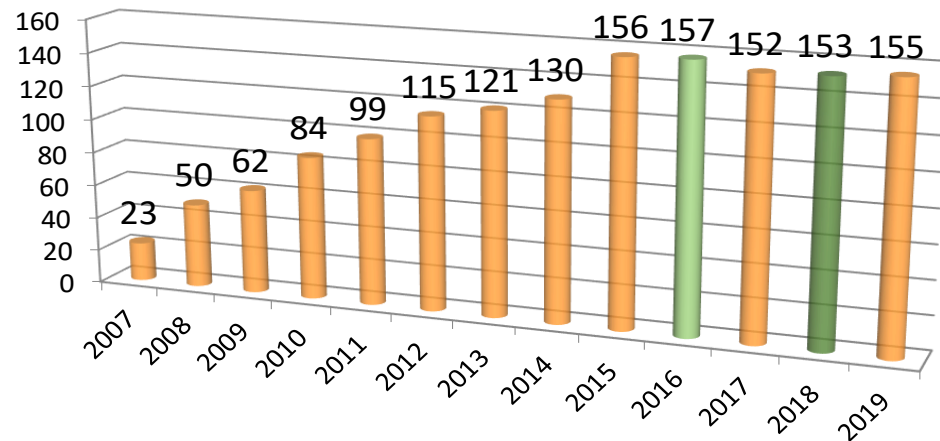
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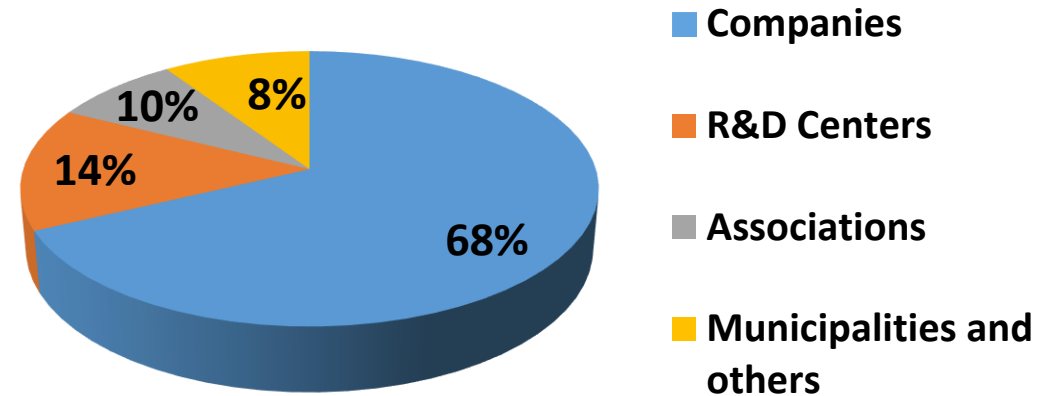
The Habitat value chain...



Cluster members & main action lines...



160 members now...



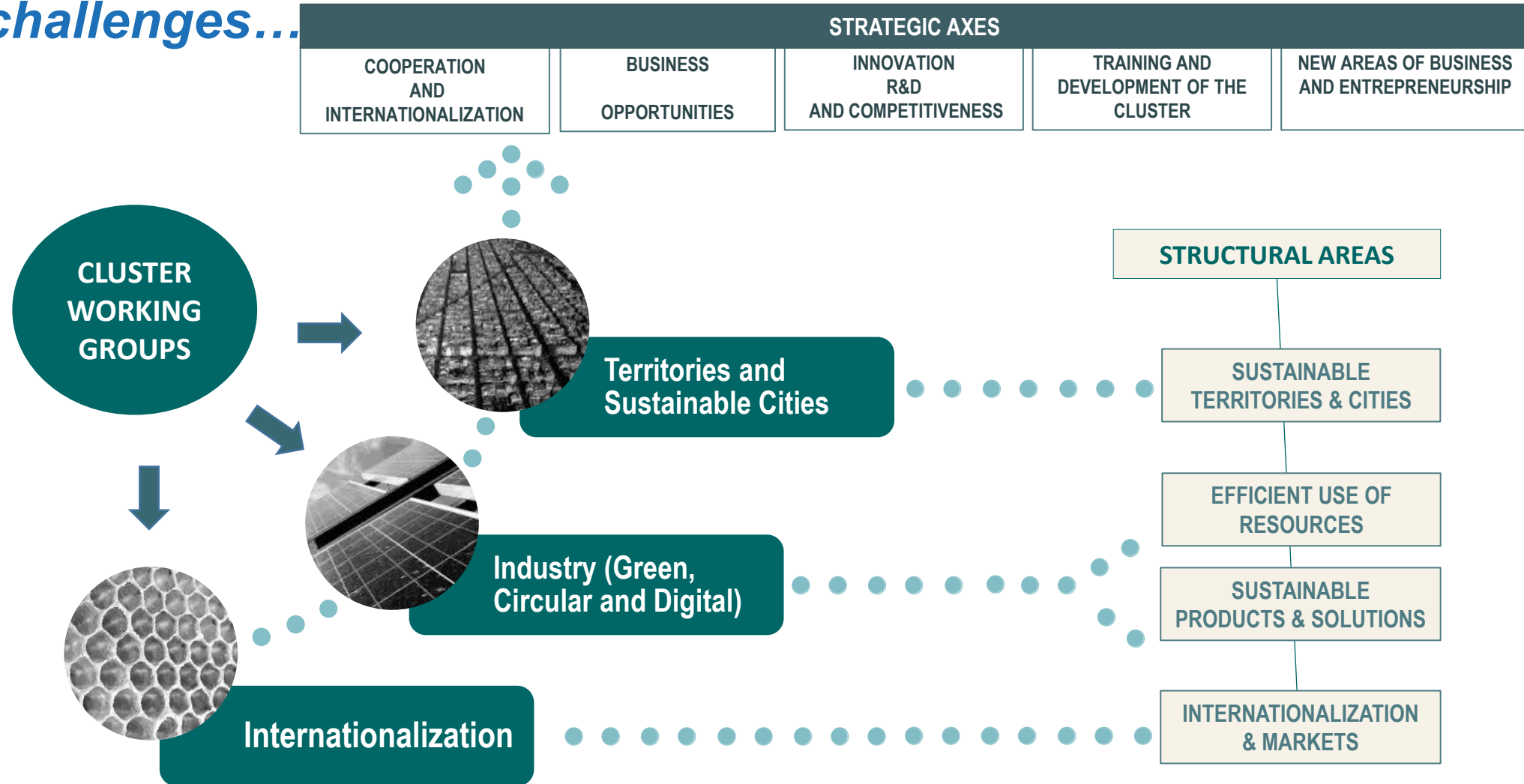
Main Action lines:

- **Promotion of Innovation and Competitiveness** (*projects, networking, markets and business opportunities, ...*)
- **Promotion and dissemination** of the cluster and its members (*conferences, workshops, B2B, services, ...*)

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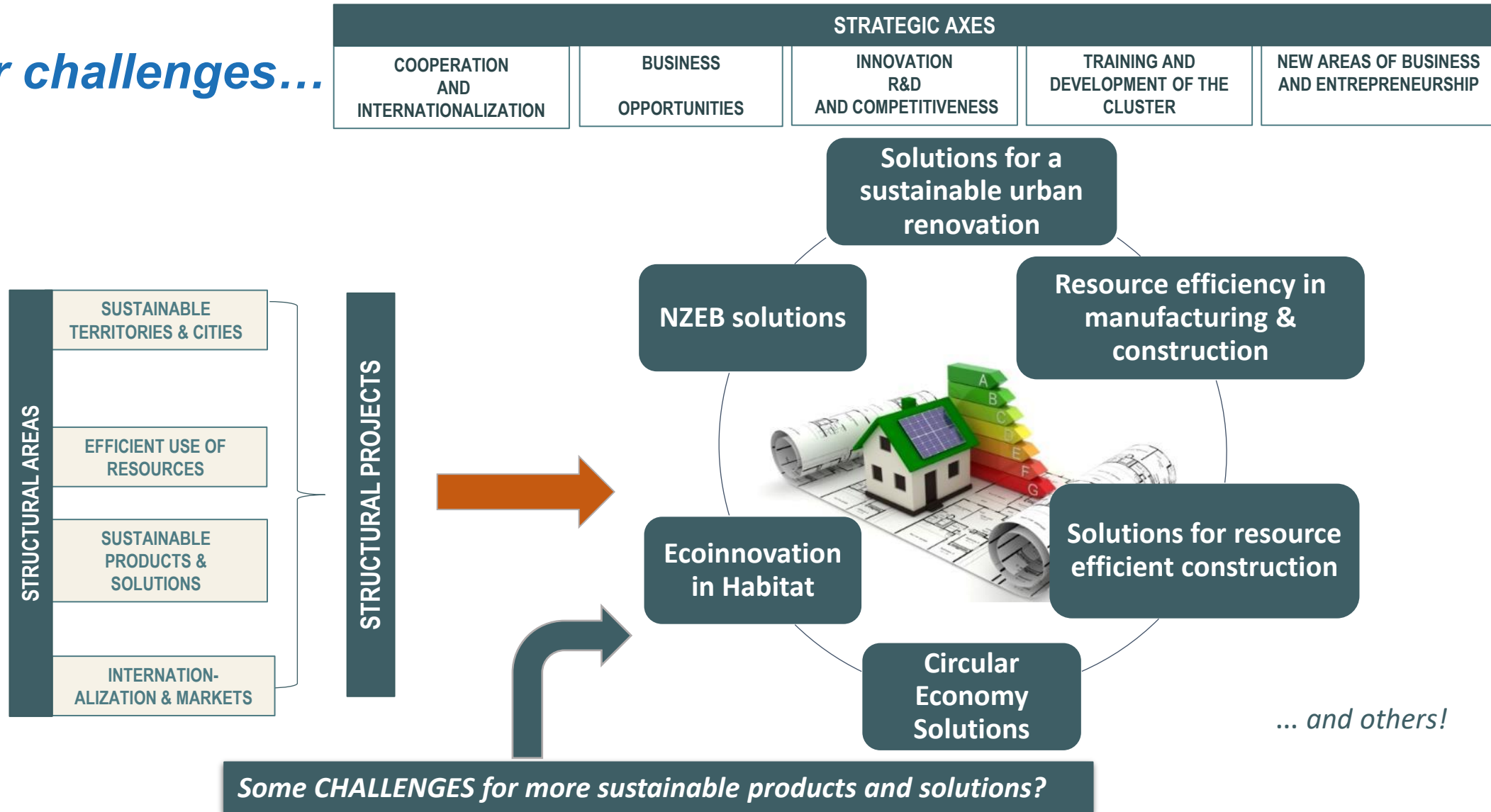
Cluster challenges...



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Cluster challenges...



Cluster contribution...

Critical situation in several construction sectors

(2010 crisis then recovering in 2015 until the new global crisis in 2020 due to Covid-19 pandemic...)

Critical environmental challenges

(Climate changes; Impact on resources; Wastes and pollution...)

Critical workforce related challenges

(Jobs and workforce deficit in some sectors; adaptation to digital challenges, ...)

What to do and How? What could be the Cluster contribution to recovery?

Cluster contribution...

Help companies find their own recovery paths through clustering, networking and cooperation based on current drivers and EU priorities such as:

- ✓ *Circular Economy and Sustainability*
- ✓ *Green Deal topics*
- ✓ *Digital transformation for smart buildings & cities*
- ✓ *Resource-efficient solutions*

Help to rethink and change their “business as usual” through Innovation to create a more **Sustainable Habitat**

(by changing the way we build and use our Habitat and products). Clusters are the ideal environment to foster this in a easier and faster way.

There are already instruments at European, National and Regional level able to help in this transition. What is important is that they are improved and used to be more effective ... *and clusters' help better.*

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