Brussels, November 5th 2014
Renovate Europe Day

"Quand le bâtiment va, tout va"
''When the building sector works, everything works''
(Martin Nadaud, 5th May 1850, French Parliament)

www.jrc.ec.europa.eu

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Serving society
Stimulating innovation
Supporting legislation
The economic boom of the 19th & 20th century was driven by the building sector

Paris, 1850

Paris, today
The decarbonisation of the EU building stock should drive the economic recovery

Europe today

Europe in 2050
The value chain of the building sector goes beyond the building work itself
The building sector has a significant indirect impact on the development of other sectors.
The building sector as a such doesn't exist in the statistics

Non-financial business economy

Construction sector

Construction of buildings + Specialised construction activities

Building sector

Development of building projects

Construction of residential and non-residential buildings

Civil engineering

Plumbing, heat, electrical and air conditioning installation

Floor and wall covering

Painting and glazing

Plastering, joinery installation

Building completion and finishing
The building sector generated 7% of the EU value added and employed 8.8% persons

<table>
<thead>
<tr>
<th></th>
<th>Value added (EUR billion)</th>
<th>Share of the value added of the non-financial business economy</th>
<th>Number of persons employed (Millions)</th>
<th>Share of employment in the non-financial business economy</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total construction</strong></td>
<td>501</td>
<td>8%</td>
<td>13.1</td>
<td>10%</td>
</tr>
<tr>
<td>Construction of buildings</td>
<td>144</td>
<td>2%</td>
<td>3.66</td>
<td>2.8</td>
</tr>
<tr>
<td>Specialised construction activities</td>
<td>283</td>
<td>4%</td>
<td>7.84</td>
<td>6%</td>
</tr>
<tr>
<td><strong>Total building sector</strong></td>
<td>427</td>
<td>7%</td>
<td>11.5</td>
<td>8.8%</td>
</tr>
</tbody>
</table>
Almost half of the value added of the building sector is generated by work on the envelope.
Up to 66% of jobs were lost in some MSs since the financial crisis
Employment in the building sector varies per region

[Map showing employment distribution across regions in Europe]

Persons employed in the building sector in %
(proportion of those employed in non-financial business economy)

- 3 - 6 [%]
- 6 - 9
- 9 - 12
- 12 - 15
- 15 - 18
- 18 - 22
n/a
out of model

Data source: Eurostat, year 2011
Analysis and map: JRC, IET, RENAME.

* Year 2010 for France and Greece
94% of enterprises in the building sector were enterprises with less than 9 persons employed.
The building sector employed 5 times more than the energy supply sector for the same value added

<table>
<thead>
<tr>
<th>Economic activity</th>
<th>Share of value added of the non-financial business economy</th>
<th>Share of the employment in the non-financial business economy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Building sector</td>
<td>7%</td>
<td>8.8%</td>
</tr>
<tr>
<td>Energy supply sector*</td>
<td>3%</td>
<td>0.94%</td>
</tr>
</tbody>
</table>

* Supply of electricity, gas, steam and air conditioning to buildings

7 November 2014
Energy renovation

a "no-regret" option for the EU economy
Thank you for your attention

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