



European
Commission

HIGH LEVEL CONSTRUCTION FORUM

Meeting report

**Webinar on the draft European Strategy on
Housing Construction**

27 October 2025, 10:00 – 12:15 CEST

Technical Secretariat of the High Level Construction Forum

DG GROW

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General overview

On Monday 27 October 2025, the Technical Secretariat of the High Level Construction Forum (HLCF) organised a webinar on the **European Strategy for Housing Construction** (hereafter also referred to as the Strategy), during which its outline was presented to the HLCF stakeholders. The webinar was split into three parts:

- **Part 1** of the webinar focused on introducing the context within the Strategy was being developed via the provision of openings remarks and a presentation on the Affordable Housing Package and its linkages to the Strategy.
- **Part 2** of the webinar focused on the outline of the Strategy by presenting the four building blocks on which the Strategy was being build, (1) Inputs, (2) Creating lead markets, (3) Permits, and (4) People, as well as the Competitiveness Coordination tool which is to be part of the Strategy. This part of the webinar included two reflection moments during which questions and comments posed by the HLCF stakeholders were answered by the presenters.
- **Part 3** of the webinar focused on outlining the next steps and introducing the final opportunity for HLCF stakeholders to provide input on the Strategy's direction through a targeted survey.

During the reflection moments, the HLCF stakeholders posed questions and/or gave feedback on the presented outline of the Strategy in relation to a variety of matters:

- The Affordable Housing Plan
- Secondary & raw material
- Reuse and recycling of material
- Offsite construction
- Links to other EU Regulations and Acts
- Cost of land
- Harmonisation across borders
- Permits
- Training and skills
- Renovation

Attendance during the webinar reached as high as 154 participants (out of 199 registrations). The PowerPoint can be found [here](#).

Opening remarks from the European Commission

Ms Barbara BONVISSUTO, Director of DG GROW Directorate H at the European Commission welcomed participants and expressed her delight at the high number of participants, indicating a high level of interest in the topic at hand. She emphasised the importance of creating a lively and constructive dialogue, as the webinar's purpose was to gather valuable input from stakeholders in the housing and construction sectors on the outline of the European Strategy for Housing Construction that would be presented.

Ms Bonvissuto explained that the European Commission aims to adopt a comprehensive package (i.e. the Affordable Housing Plan) by the end of 2025 to concretely respond to the ongoing housing crisis and related issues in regard to affordable housing. She noted that as part of this collective effort, DG GROW is designing the **European Strategy for Housing Construction** to bridge the gap between housing demand and supply, with the construction sector as a key enabler by becoming more productive and competitive. However, **Ms Bonvissuto** acknowledged that the construction sector is currently facing various challenges and therefore the European Commission wants to interact with the

stakeholders on how to support the competitiveness of the sector. She shared that the current version of the Strategy consists of four main building blocks, each with their own specific measures, tools, etc. It can be seen as the competitiveness strategy for the construction sector, as well as how to address decarbonisation within the sector. She highlighted that the Strategy also seeks to simplify regulations and reduce administrative burdens, in line with the European Commission's broader focus on making life easier for stakeholders.

Lastly, **Ms Bonvissuto** thanked the HLCF stakeholders that already contributed to the development of the Strategy by replying to its Call for Evidence that was out earlier in 2025. She emphasised that the provided input is of great value and is being considered in the process of drafting the Strategy. Nevertheless, **Ms Bonvissuto** welcomed further contributions and exchanges with participants during (and after) the webinar to ensure the Strategy was heading in the right direction

The Affordable Housing Package (December 2025) and its linkages with the Strategy for Housing Construction

Mr Stefan Moser, Head of Unit of the Housing Task Force, DG ENER, European Commission, presented the objectives of the upcoming Affordable Housing Package, describing it as a comprehensive approach to correcting housing imbalances by acting simultaneously on supply, demand, social protection and access to finance. He stressed that improving delivery requires closer cooperation across all levels of government and across departments, as well as structured engagement with stakeholders to identify where procedures can be simplified without lowering standards.

On the supply side, **Mr Moser** noted that the main concern is speed and efficiency, particularly in permitting and planning. The European Commission's aim is to streamline administrative processes while maintaining sustainability and quality requirements, ensuring accessibility, safety and inclusion without unnecessary costs. He underlined that the Affordable Housing Plan does not seek to reopen existing legislation or weaken protection levels, but to improve implementation and review optional or excessive rules that may not be necessary in practice. In this regard, early dialogue with stakeholders is essential to ensure proportionality and avoid overbuilding or burdensome requirements.

Mr Moser also highlighted the need to improve public procurement procedures and ensure a more effective mix of public and private financing, supported by closer cooperation between EU institutions, promotional banks, and private investors. The Affordable Housing Plan, to be presented on 16 December, will combine a construction strategy on the supply side with targeted measures for vulnerable groups on the demand side, as well as reforms related to taxation, vacancy reduction, and regeneration of public space (all linked to the New European Bauhaus). He concluded by explaining that new governance approach and a new European investment platform will act as cooperation frameworks to translate good practices into concrete outcomes across the European Union.

The outline for the European Strategy for Housing Construction

Building block 1 'Inputs' - Securing access to raw materials, including reused and recycled materials

Mr Pieter Staelens, DG GROW H.1., European Commission, presented the first building block of the European Strategy for Housing Construction, which focuses on securing access to construction inputs and raw materials. He explained that rising prices and growing scarcity of key materials are placing significant pressure on the construction sector and directly increasing housing costs. For example, between 2020 and 2024 prices rose by 28% for concrete products and by 45% for ceramic products, which together represent a substantial share of total construction costs.

He underlined that, despite new waste processing technologies, the reuse of construction and demolition materials remains very limited. Only 0.7% of such waste is prepared for reuse in new buildings, and even for recycling the shares for some materials (e.g. plaster, glass) remain low. Stakeholder input received through the recent Call for Evidence highlighted the same concerns: high material costs, fragmented regulation, lack of reliable access to secondary materials, inconsistent data collection, and the need for greater economic incentives and digital traceability tools.

Building on these findings, **Mr Staelens** outlined three main lines of action. First, improving access to information on available secondary materials through the mandatory digitalisation of pre-demolition audits, possibly linked to demolition permits and supported by EU-wide data standards. This would enable the creation of material banks and online marketplaces. Second, simplifying and harmonising end-of-waste criteria which currently block secondary products from circulating within the single market and prevent them from obtaining product status. Third, strengthening the monitoring of essential construction raw materials to better anticipate shortages and improve supply chain resilience, complementing and expanding current work on critical raw materials.

He concluded by noting that these actions aim to ensure a more reliable, affordable and circular supply of construction materials, which is indispensable for addressing Europe's housing affordability challenge.

Building block 2 'Creating lead markets' - Supporting innovation, de-risk, creating lead markets and scaling up

Mr Jens Schumacher, DG GROW H.1., European Commission outlined the second building block aimed at creating lead markets and increasing productivity and innovation uptake in the construction ecosystem. The starting point is that the sector continues to show comparatively low productivity, which limits its capacity to build more and faster. Although many innovative products and construction techniques already exist (e.g. robotics, automated and 3D printing solutions, modular and off-site construction, low-carbon and bio-based materials, circular product design), their real uptake on construction sites remains limited.

To address this gap, the European Commission aims to create lead markets for innovative construction products and solutions. This includes both technological innovation and new ways of working across the value chain. Circularity is also a central consideration, with an emphasis on products that can be reused, recycled or repurposed more easily throughout their lifecycle. A key lever for this transition will be the revised [Construction Products Regulation \(CPR\)](#), which provides a framework to update and extend product standards and remove market barriers. **Mr Schumacher** explained that the European Commission intends to accelerate standardisation processes and broaden their coverage to a wider range of construction products. In addition, the European Commission plans to promote off-site construction by requesting standardisation bodies to develop standards not only for individual products but also for building elements such as wall or roofing systems.

Digitalisation will also play a key role. The rollout of the digital product passport is expected to support transparency, traceability and more efficient circulation of products within the Single Market. These efforts are complemented by wider initiatives under the Clean Industrial Deal and the forthcoming Industrial Accelerator Act, both of which aim to create lead markets for low-carbon products and to speed up permitting for new industrial capacity in Europe. The Strategy is further aligned with actions under the Circular Economy Act and the Bioeconomy Strategy, which seek to scale up the use circular and bio-based solutions. Funding opportunities will stem from the New European Bauhaus facility, the next Multiannual Financial Framework, and support from the European Investment Bank. Together, these measures aim to strengthen investment, improve uptake of innovative solutions, and enable the construction ecosystem to contribute more directly to improving housing affordability.

The Competitiveness Coordination Tool

Mr Inigo Urresti, DG GROW H.1., European Commission presented the Competitiveness Coordination Tool, which is designed to support strategic industrial ecosystems (incl. construction) by coordinating investment efforts with Member State reforms and by identifying both financial and regulatory gaps that limit sectoral transformation. The objective is to work jointly with Member States and in close cooperation with industry to build concrete cases for supporting the transition of priority sectors. The mechanism combines financial support for investment with parallel work on administrative or legal barriers to reduce burdens and facilitate market growth. In the housing context, the focus will be on off-site and industrialised construction, which the European Commission sees as having the strongest growth potential and a direct link to housing affordability and productivity.

One of the main obstacles to scaling off-site construction in Europe is the instability of demand, which results from fragmented regulatory frameworks and divergent building codes across Member States, and in some cases even across regions. This fragmentation prevents companies from operating at scale, limits cross-border activity and discourages long-term investment. The new Tool is therefore intended to help create more predictable pipelines and a more integrated internal market for industrialised construction solutions.

The European Commission is currently in early exploratory discussions with Member States and stakeholders, and intends to develop the initiative towards a joint political commitment (potentially in the form of a Memorandum of Understanding), in 2026. The next phase will focus on identifying concrete projects and practical levers such as harmonised technical specifications, better alignment of building codes, and the creation of cross-border demand, particularly for public and social housing.

Reflections from the HLCF members on building blocks 1 & 2 and the Competitiveness Coordination Tool

After the presentations, comments and questions posed by the HLCF stakeholders were addressed by the presenters.

Affordable Housing Plan

Participants asked questions on (1) whether the Affordable Housing Plan would address alternative cost models that consider long-term value, social impact, and life-cycle costs, (2) whether the Strategy would focus on cities and what was foreseen for regions, and (3) if the European Commission would acknowledge the crisis in which the construction sector is in future publications. It was also commented that the Affordable Housing Plan should consider that the building design determines the affordability during the life-cycle of the built environment, and that operating costs for heating and cooling needs to be minimised.

Mr Moser explained that there should indeed be an optimisation in terms of long-term value and life-cycle costs for society, including social impacts, and that the Housing Alliance should equally address the national, regional and local levels and in close cooperation with the Agenda for Cities in regard to local levels.

Building block 1 'Inputs'- Secondary & raw material

Participants asked questions in relation to (1) whether the transport of secondary raw materials being limited by their current 'by-product' status would be addressed, (2) how the Strategy would link with the upcoming Circular Economy Act, (3) which specific construction materials would be considered essential to monitor, (4) which data points would be required from pre-demolition audits to support the creation of a marketplace for secondary materials, and (5) if the Strategy would evaluate existing environmental legislation impacts in regard to sustaining existing operations. It was appreciated that the Strategy recognises the need for primary raw materials as essential to any construction.

Mr Staelens stressed that the way forward for two key actions of the Strategy (i.e. the end-of-waste criteria and the pre-demolition audits) will be set through the Circular Economy Act (planned for the end of 2026). He added that the transport of secondary raw materials remains important, but there is currently no real single market for secondary construction materials and actions will be needed to increase their circulation. **Mr Schumacher** noted that one idea under discussion is to link end-of-waste criteria with CE-marking under the CPR to avoid two separate procedures. Ideas and practical input are being collected on where alignment is most needed and how the procedure could work in practice.

In regard to monitoring construction material, **Mr Staelens** explained that an internal exercise to identify which raw materials are essential for the construction sector is ongoing. These will not be listed directly in the Strategy but will be part of an assessment starting soon, focusing on materials whose scarcity would seriously disrupt construction activity. The assessment will look at key value chains (e.g. plaster, concrete, glass) and identify which inputs are most critical. He added that a first screening based on preliminary criteria is already underway (findings expected in 2026). **Ms Bonvissuto** added that the European Commission has already begun analysing which critical raw materials are most relevant for construction, drawing on the screening carried out under the [Critical Raw Materials Act](#). Seven materials have been identified as most widely used in the sector: feldspar, boron, aggregates, gypsum, silica sand, limestone and perlite. Stakeholders were invited to indicate whether this preliminary list reflects their experience or if other materials should be considered.

Mr Staelens noted that which data-points would be required is a key question and one he puts back to the stakeholders. The European Commission has some initial ideas but it is seeking input from stakeholders on which information would be most useful to effectively support market development.

Building block 1 - Reuse and recycling of materials

Stakeholders asked questions in relation to (1) how the Strategy would tackle that building and construction materials have long lifetimes but that the presence of legacy additives and the current regulatory framework do not allow the sector to fully go circular, (2) if the European Commission would support the facilitation of transporting hazardous products to be reprocessed and recycled into products with no hazard, (3) which measures would be effective in creating a level playing field that that would enable circular materials to compete fairly in the construction market without being constrained by macro-economic parameters, and (4) whether reuse and refurbishment for construction products will be addressed in each product group standard and what process is envisaged for doing so.

Mr Staelens acknowledged that existing regulations on safety, health, and structural stability could hinder the re-use of secondary materials as circular construction products. Addressing such regulatory barriers is one of the key actions of the foreseen Strategy to increase the uptake of reused materials and support greater circularity in the construction sector. **Mr Schumacher** explained that the intention is to address all these aspects with the Strategy, including dangerous substance and their transport.

Furthermore, **Mr Staelens** noted that there are also broader macroeconomic factors at play, including cost differences, that make the use of secondary construction materials less attractive in certain cases. He explained that the European Commission is working on this (e.g. through Horizon Europe and the JRC) to reduce processing costs and improve reuse. In parallel, several strategies aim to support the demand side through economic incentives, in order to help create a level playing field for circular construction products.

Mr Schumacher explained that under the new CPR, products placed on the market with CE-marking will have to declare their global warming potential based on harmonised calculation rules that will be set either in the standards or in dedicated Acts, along with supporting background datasets to ensure a uniform EU-wide methodology. He added that circularity will also be integrated into the new product standards wherever relevant, allowing for standards on reused materials, the declaration of recycled content, or specific product requirements to improve reuse and recycling. For secondary raw

materials, additional testing may be required to verify safety and performance, ensuring that reused products meet the same quality and safety standards as new ones.

Some stakeholders also commented in regard to the reuse and recycling of materials. It was commented that reuse of materials shows a great potential in the construction sector for wide range of products and materials and needs more support. It was also pointed out that if one wants to be able to reuse or recycle products more easily in the future, it would be relevant to know about their content at the time of deconstruction and that the Strategy does not mention mandatory content declarations into Digital Product Passports under CE marking. In regard to re-use/recycling demolition waste, it was commented that pre-demolition audits alone are not enough to leverage this use and it is key to support the development of complete ecosystems from the deconstruction site down to the reprocessing and recycling facilities.

A few good practices were shared in regard to national re-use/recycling practices. The Swedish Environmental Research Institute had built a [online marketplace](#) where building companies within Sweden can market available demolition materials, including images, technical condition and any associated costs. In France, it is mandatory to do a pre-demolition audit before deep renovation or demolition of buildings, which seems to work well and to be a real incentive for the adoption of circular practices, in particular re-use

Building block 2 - Offsite construction

A stakeholder asked if the new standards would be set at horizontal level or at product level, and how this would be organised if this was to be done at the product level.

Mr Schumacher noted that this would be implemented as part of the CPR via a dedicated subgroup of CPR experts on building kits. The aim is to discuss with industry stakeholders and Member States which types of building kits should be harmonised first, and at what level. The discussion will be on product level and is expected to lead to product standards and CE-marking not only for individual materials, but for full building elements (e.g. walls, windows, insulation systems). Therefore, the European Commission is seeking input on where to start and which product categories should be prioritised.

Other relevant EU Regulations and Acts

Various stakeholders posed questions on (1) what the links and/or synergies are between the Strategy and the upcoming [Industrial Accelerator Act](#), and (2) whether the [Advanced Materials Act](#) is also linked to the Strategy's work to secure access to raw materials.

Mr Schumacher explained that the Industrial Accelerator Act aims to keep the production of low-carbon materials in the EU (particularly innovative forms of steel and cement) and to promote their uptake in the market. The goal is to ensure that energy-intensive industries can continue to operate in Europe in the long term. This is directly relevant for construction, as around half of all steel and almost all cement produced in the EU are used in the building sector. **Ms Bonvissuto** added that promotional lead markets for clean products includes construction products. Furthermore, streamlining permitting procedures for big industrial decarbonization project may also help the construction sector. **Mr Staelens** recalled that the Advanced Materials Act aims to help industries meet Green Deal objectives by bringing advanced materials *'from lab to market'* and providing substitutes for traditional inputs while strengthening Europe's strategic independence. The Act covers many industrial sectors and the construction strand of the Strategy focuses specifically on the value chains for materials (e.g. glass, concrete and ceramics) and on identifying which basic raw materials are essential for their functioning. The goal is to better monitor these inputs and to anticipate possible shortages that could seriously affect the sector.

Cost of land

A stakeholder commented that cost of land significantly affects the overall cost of construction in Europe and yet is often not captured in the official indices. Therefore, changes in land prices are not reflected even though they represent a major component of final costs for buyers and developers.

Mr Staelens clarified that while material costs account for around 30 to 40% of a residential construction project but agreed that the cost of land is a major and rising component of overall housing costs, especially in urban areas. He noted that land prices are closely linked to land availability and to planning and zoning rules, which determine where building, densification or repurposing is allowed. As these matters largely fall under Member State competence, they are not straightforward to address at EU level. However, he stressed that the Affordable Housing Plan also aims to explore how the European Commission can collaborate with Member States to help tackle high land prices, and invited further input on this point. **Ms Bonvisuto** added that environmental authorisations and permitting procedures also play a role in delays, and that part of the work ahead will be to identify how these can be streamlined and accelerated. Building permits are largely handled at local level, but the European Commission can support Member States by promoting best practices, digitalisation tools and standardisation, for example through digital building models and logbooks. The intention is to look at the full chain of administrative procedures, starting with urban planning and zoning, in order to help reduce overall costs.

Across borders

Stakeholders asked (1) whether the harmonisation of whole life-cycle / global warming potential assessment methodologies (without national divergence) is foreseen as part of the Strategy and (2) what the next step would be in a situation where the scrap market is distorted in a way that favours exports of material prepared for recycling to non-EU countries.

In regard for the harmonisation of the life cycle, **Mr Schumacher** shared that this is indeed what the European Commission is planning to do. In regard to early alert mechanisms, **Mr Staelens** acknowledged that large-scale exports of essential materials to non-EU countries could also become an issue but explained that there is currently no specific action planned on this point within the Strategy. However, he noted that it is an important concern and welcomed that this was raised.

Building block 3 ‘Permits’ - Accelerating and digitalising permitting procedures

Pablo Gutierrez Velayos, DG GROW H.1., European Commission, gave a presentation on the findings from the Call for Evidence for the Strategy and a recent survey in relation to building permit processes (the main topic for building block 3). **Mr Gutierrez Velayos** emphasised two central issues that came forth from the Call for Evidence: (i) the regulatory complexity brought about by varied national, regional, and local laws across Member States for project developers/owners, and (ii) that complex and uncertain permitting procedures contribute to increasing the construction costs of housing, extend timelines, reduce predictability and also limiting the total output of the construction sector (both in terms of new buildings and renovations).

The gathered input revealed that permitting procedures across Europe are generally slow, complicated, and inconsistent. Most respondents to the Call for Evidence indicated that the time required to obtain a building permit can take between 60 to 300 days, depending on the Member State. **Mr Gutierrez Velayos** highlighted that respondents reported a notable drop in building permits between 2021 and 2024, exacerbating housing shortages and driven up prices across the EU. Long and/or delayed permit processing can result in significant additional expenses and discourage smaller firms from entering the market due to increased financial risks and unpredictability.

Identified key causes of such delays included fragmented regulations across Member States and municipalities, understaffed local authorities, and continued reliance on paper-based systems. Additional complications arise from lengthy zoning and environmental assessment procedures,

further adding to unpredictability and planning difficulties for project developers. These systemic inefficiencies also inhibit innovation, particularly for SMEs and modular builders who depend on swift and reliable approvals.

Mr Gutierrez Velayos highlighted that digitalisation was seen as a promising solution to such challenges. Pilot projects within the EU have shown that digital permit systems can cut processing times by up to 55%, and integrating digital tools (e.g. building information modelling, digital log books) enhances accuracy, transparency, and efficiency, allowing applicants to track their progress and reducing errors. Other solutions suggested in the Call for Evidence were simplification and harmonisation of processes (especially approval), introducing binding time limits and tacit approval systems, strengthening administrative capacity, and creating at the EU level monitor activities to track performance, cost, and digital progress over time.

The survey results reinforced these findings, noting significant variation in permit durations both between and within Member States. The most problematic areas identified were complex design and architectural requirements, performance and safety compliance, and heritage preservation measures.

Mr Gutierrez Velayos concluded by sharing the intention of the European Commission to launch an in-depth study on such matters, and that based on the results of the Call for Evidence and the survey, various actions proposed within the European Strategy for Housing Construction aimed at streamlining and digitalising residential building permit processes, with ongoing monitoring of progress based on continued input from stakeholders.

Building block 4 'People' - Ensuring access to skills and services

Mr Roman Horvath, DG GROW H.1., European Commission, started his presentation of building block 4 by emphasising the crucial role of people and appropriately skilled labour in enabling the construction industry to address housing policy goals. He highlighted key challenges facing the construction sector, including a shortage of workers, an ageing workforce, and gender imbalances that make it difficult to attract more women into construction. These issues are not unique to the construction sector, as society as a whole is ageing, making the competition for young talent increasingly fierce. The need for the construction sector to make a concerted effort to attract and retain young people was emphasised, as was the importance of forward-looking upskilling and reskilling to meet both current and future legislative requirements. EU-backed upskilling programmes are seen as positive, but **Mr Horvath** noted that they must be better aligned with actual sector needs and expectations, and help overcome mobility barriers, particularly in cross-border regions.

Digitalisation and the integration of AI were identified as both challenges and opportunities. Workers must be able to use digital and AI tools to boost productivity, but these tools should also be incorporated into training programmes to enhance the effectiveness of upskilling and reskilling activities. **Mr Horvath** referenced the European Commission's recent communication on the Union of Skills, stressing that Europe must continue to attract, develop, and retain top talent (not just from within the European Union) but globally to support innovation, growth and competitiveness. The importance of evidence-based action was reiterated, with a call for robust data collection and intelligence on skill needs to inform policy and programme design.

Mr Horvath outlined the main EU-led training and skills initiatives relevant to construction, including Erasmus+, Centres of Vocational Excellence, and the Build Up Skills projects funded by the LIFE programme. The New European Bauhaus Academy was also mentioned as a key institution for fostering advanced skills relevant to construction's green and digital transitions. To support these efforts, the European Construction Observatory was relaunched to provide up-to-date intelligence on skills needs and sector developments.

Mr Horvath also addressed the importance of further integrating the single market for construction services, highlighting that significant barriers remain, particularly around occupational mobility, mutual recognition of qualifications, insurance, and liability. These barriers were seen as hindering

cross-border labour mobility and market access to a degree comparable with 100% customs tariffs. To address this, the European Commission plans to propose a Construction Services Act aimed at lowering these barriers, with stakeholder consultation and a call for evidence scheduled in the near future.

Reflections from the HLCF members on building blocks 3 & 4

After the presentations, comments and questions posed by the HLCF stakeholders were addressed by the presenters.

Building block 3 - Permits

Stakeholders asked (1) what is envisioned to be done about the unclear zoning and environmental regulations, (2) if the environmental constraints will be addressed and/or assessed, (3) what the European Commission is doing to map the state of play of digital building permits, and (4) what is being done about the potential of improving interoperability between digital building permits and digital building logbooks. The importance of applying a thorough competitiveness check to make sure that environmental legislation is conducive for construction, growth and competitiveness was also underlined by a stakeholder.

Mr Velayos Guetierrez explained that the Strategy currently focuses exclusively on the building permit phase as such, so the final authorisation granted by competent authorities allowing construction or renovation works to begin according to the submitted plans. Matters related to spatial planning and zoning are outside the scope of this specific Strategy but **Mr Velayos Guetierrez** ensured that these aspects will be addressed separately within the Affordable Housing Plan. In relation to the environmental assessments initiatives, this is being evaluated by colleagues at DG Environment to determine how to streamline and speed it up and is outside the remit of this specific Strategy. **Ms Bonvissuto** fully supported what her colleague said, and also underlined that spatial planning and zoning is to be part of the Affordable Housing Plan, with related proposals being developed by DG Environment. She encouraged the HLCF stakeholders to share any relevant input on these matters, which would be shared with the relevant colleagues. She shared that the EU's role is primarily to streamline procedures at the European level, while significant flexibility remains with Member States and so there is a need for a multi-layered approach.

Mr Gutierrez Velayos also clarified that the European Commission is conducting a study on building permit processes across six Member States. However, the aim is to expand on this study and launch a new study focusing on all 27 Member States with a particular emphasis on housing projects by the end of 2025, to be finalised by the end of 2026. It will include a mapping of the state of play in terms of procedural steps and processing times. The Study will also analyse the level of digitalisation in building permit systems and will assess how legislative and technical requirements impact housing supply and the competitiveness of the construction sector. The goal of the study would be to identify initiatives for simplifying permitting procedures in capping the permitting process and digitalising the building permits across the EU, including a detailed cost-benefit analysis, as well as developing reasonable targets for local authorities for further digitalisation and simplification of the processes depending on the size and on the state of play in that particular Member State.

Mr Gutierrez Velayos acknowledged the significant potential of enhancing interoperability between digital building permits and digital building logbooks for relevant authorities and society at large. Currently, there are several EU initiatives regarding digital logbooks but they differ in their objectives and data formats, resulting in minimal interoperability. Therefore, this is something to be looked at within the Strategy; the aim is to explore actions to improve data sharing between these systems, creating a unified source of building information throughout a structure's lifecycle. This would enable authorities to more effectively monitor compliance with safety, accessibility, energy efficiency and sustainability requirements in a digital building permit system. The Strategy intends to contain an action focusing on improving this interoperability and potentially increase this by linking with other

information tools from EU regulations (e.g. Digital Product Passports, Energy Performance Certificates, etc.).

Building block 4 – Training and skills

Stakeholders posed questions on (1) if the Strategy will foster the development of the Pact for Skills in Construction, (2) if it would become possible to make links between vocational, applied, and academic skills and the required digital transition (including re- & upskilling) as this is currently not supported by Erasmus+ or one of the other support program, (3) the possibility of developing modular trainings that may lead to an European accepted certification, and (4) if curricula (both academic and vocational) will be assessed to ensure they are future-proof in relation to building renovations becoming more relevant for sustainability and decarbonisation.

Mr Horvath stated that the Strategy plans to refer to the Pact for Skills as a major initiative to mobilise construction stakeholders to create partnerships, share good practices, and join efforts to address challenges existing in the construction industry. In regard to linking skills and digital transition, **Mr Horvath** found it challenging to point to a single programme supporting links between vocational, applied, and academic skills for the digital transition. However, he mentioned upskilling hubs of New European Bauhaus Academy, such as the possibility to address upscaling programmes at the level of bachelor studies at universities. Furthermore, **Mr Horvath** noted that while modular training would be highly beneficial for upskilling and reskilling workers, education and training remain under the authority of Member States and so achieving a form of an European accepted degree would be challenging. Therefore, strong cooperation with Member States will be necessary, particularly regarding the recognition of qualifications and strengthening the single market in skills. With respect to renovations, **Mr Horvath** underlined the need for different skills when building new houses or renovating existing ones. New builds necessitate up-to-date knowledge of current techniques and requirements. When renovating, workers can rely more on past experiences and adapt it to modern standards. The importance of upskilling and reskilling applies to both new buildings and renovations cannot be understated, and so the European Commission is committed to ensuring the implementation of projects that address the specific needs of workers involved in renovation (given its significant role in the construction market) as well as new build.

In regard to renovation, a stakeholder pointed out that the specificities of the renovation market was not mentioned as part of the Strategy (even though it is seen as a big part of the construction market across Europe) and questioned if more emphasis is placed on new built in the Strategy.

Mr Schumacher emphasised that most of the measures that are part of the Strategy will also address renovations. **Mr Staelens** underlined this point even further, stating that even though renovation is not always mentioned explicitly within the Strategy, it is recognised as a highly important aspect of residential construction. Many of the planned actions contained within the Strategy (including those related to training and skills, offsite construction, and permitting) were designed with a clear focus on renovation. Modular offsite construction solutions are particularly well suited to support renovation projects, and the Strategy acknowledges and aims to address the specific challenges associated with renovation permitting processes.

Limits

A stakeholder asked how the European Commission planned to organise a harmonised approach for assessing and setting limits for buildings Global Warming Potential given the room for flexibility given at the start in the [European Performance of Building Directive \(EPBD\)](#).

Mr Schumacher responded that it would take some time to fully harmonise such calculations, though the calculations will become more aligned with more standards under the CPR.

Launch of the survey for final input on the European Strategy for Housing Construction

As previously announced, the Technical Secretariat of the High Level Construction Forum launched a short survey (deadline Tuesday 4 November 2025 23:59 CET) via which the HLCF stakeholders had the opportunity to provide final feedback on the Strategy. Stakeholders were encouraged to respond based on what was presented and to indicate if they thought the Strategy was addressing the needed aspects in relation to the construction sector.

Concluding remarks

The Technical Secretariat of the High Level Construction Forum closed the webinar by thanking all speakers and participants for their valuable input and fruitful exchanges. It was emphasised that all feedback and questions posed during the webinar will be taken onboard for the further development of the Strategy, set to be published in December 2025.

Annex – List of participating organisations

ACE	ANCE
Architects Council of Europe	ART-ER
ASSA ABLOY Opening Solutions EMEA	BASF
BBF-FBB Fédération Belge de la Brique	BDH
BEAM CUBE	Bellona Europa
BIBM - Federation of the European Precast Concrete Industry	BMWSB
Bouygues Europe	Boverket
BPIE	Bundesverband Baustoffe - Steine und Erden e.V.
Bundesverband Deutscher Fertigbau e.V.	Byggföretagen
CEMBUREAU, the European Cement Association	Cerame-Unie
CERTIF	CERTIF - Associação para a Certificação
CINEA	City of Lahti
Cleantech Bulgaria	Climate Action Network (CAN) Europe
Cobaty International	Confederation of Finnish Construction Industries
Conference of Construction and Housing Ministers of the Federal States in Germany	Construction Products Europe
CROABFC	CSTB
Deutsche Bauchemie	Deutsche Säge- und Holzindustrie Bundesverband e.V.
DI Construction	DIBt (Deutsches Institut für Bautechnik)
EAE European Association for External Thermal Insulation Composite Systems	EBC - European Builders Confederation
EC DG GROW	ECCE European Council of Civil Engineers
Ecorys	ECSPA
ECTP	EHPA
Energy Policy Group	EPG
ESWA	Etex
EU BIM TASK GROUP	EUFCA
EURIMA - the European Insulation Manufacturers Association	European Aluminium
European Commission	European Environmental Bureau
European Panel Federation	European Parquet Federation - FEP
Federal Ministry for Housing, Urban Development and Building (Germany)	Fédération Française du Bâtiment
FIEC	Finnish Property Owners Rakli
FRANCE CIMENT	Fundación Laboral de la Construcción
Future Insight	FV Holzindustrie
Galician Agency for Forest-based Industry	GBCE
German Sustainable Building Council (DGNB)	Glass for Europe
Grupo Casais	Hauptverband der Deutschen Bauindustrie
Heidelberg Materials	IIGCC
iiSBE (International Initiative for a Sustainable Built Environment) and KIT (Karlsruhe Institute of Technology)	Instytut Techniki Budowlanej
JRC	Kingspan Group
Knauf Insulation	LEITAT

Liaison office Federal Chamber of German Architects	Living Future Europe
MCCAA	Ministerstvo průmyslu a obchodu
Ministry of rural affairs and infrastructure	Ministry of the Environment (FI)
Peab AB	PEDMEDE
Plastics Europe	PU Europe
R2M solution	RIVA Acier
Ruukki Construction	Saint-Gobain
SBS - Small Business Standards	SEFA
Stora Enso	Swedish Construction Federation
Tarkett	Teneo
The Confederation of Finnish Construction Industries RT (CFCI)	TNO
UIPI	UNIBS
Velux	VinylPlus
VITO	Wienerberger AG
World Green Building Council	

HIGH LEVEL

CONSTRUCTION

FORUM