

SUSTAINABLE CERTIFIED BUILDINGS

2022 ANALYSIS



PLGBC
Polish Green Building Council

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The following report has been developed based on information contained in the database of certified buildings run by PLGBC at <https://baza.plgbc.org.pl/>. The database provides useful information on each of the buildings included in it and can be filtered in many ways.

Last year's summary, dated April 2021, was produced when the world was in the midst of the COVID-19 pandemic, and the period analysed then, from March 2020 to March 2021, was marked by pandemic dynamics. In April 2022, when the current analysis is drawn up, the situation is even more dynamic and complicated: the war in Ukraine, which has been going on for over a month, has overshadowed all other topics for obvious reasons.

In the context of the construction sector, the war in Ukraine had an immediate effect in terms of labour shortages on construction sites, from which Ukrainian workers left en masse to fight for their country. In the longer term, we are likely to see a number of other developments: positive and negative, and these observations will feature in next year's analysis.

It is very important to note that the answers we received from the operators of BREEAM, DGNB, LEED and WELL show that these schemes have suspended any activities on the Russian and Belarusian markets since the war started: no new registrations for certification are accepted, current projects have been discontinued. This shows that the sustainable building community is supporting Ukraine in solidarity.

The development of certified construction in Poland in the period covered by this report, i.e. from March 2021 to March 2022, can be assessed positively. The dynamics show that earlier fears about the impact of the pandemic on the market did not come true: year-on-year, there were more new certified buildings and the certified area increased just slightly less than the year before.

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©2022 PLGBC. The Polish Green Building Council (PLGBC) is a non-governmental organisation which since 2008 has been working for the transformation of buildings, cities and their surroundings in such a way that the way they are planned, designed, constructed, used, modernised, demolished and processed is as sustainable as possible.

The organisation supports the creation of sustainable buildings for all by:

- halting climate change and adapting to new conditions,
- applying the principles of the circular economy,
- enhancing well-being, quality of life and the health of society,
- enhancing biodiversity.

PLGBC is part of a global community of around 70 green building councils within the World Green Building Council.

SUMMARY OF PERIOD FROM MARCH 2021 TO MARCH 2022

In addition, during the period from March 2021 to March 2022:

Three phenomena stand out in the analysed period: a very dynamic growth of certified warehouse space, by as much as 4 million m² in a year, which translates into 171 new certified facilities. Thus the certified warehouse space by 1.9 million m² exceeded certified office space, which has reigned in all rankings since the very beginning of multi-criteria certification in Poland.

Another important trend is the huge drop in new certifications among retail buildings. In the period covered by this report there are only four new certified retail developments compared to 45 the year before. This is a clear sign of the pandemic changes taking place in this part of the market.

There is also a third phenomenon resulting from the pandemic: the large number of WELL Health & Safety Ratings which, at the time of closing this analysis, had already been awarded 43 times, compared to seven the year before. At the same time, it should be stressed that this rating is not taken into account in the overall ranking, as it is not a multi-criteria certificate, but a system for assessing the safety of buildings that makes it possible to evaluate whether the procedures used in a building have a positive impact on reducing the risk of COVID-19 and other epidemiological risks.

The number of BREEAM certified buildings exceeded the number of all certified buildings presented in last year's report.

The first concert hall, Cavatina Hall, was certified under BREEAM International 2016 (Excellent, January and November 2021) and WELL Health & Safety (May 2021).

The Warsaw Hub has received several new certifications over the past year and currently holds: BREEAM (September 2021), WELL Health & Safety (March and May 2021) (both for the office, retail and hotel parts), as well as LEED Commercial Interiors for the Google office (February 2022).

First three certifications (Gold) in LEED v4.1 Operations + Maintenance for Cross Point A/B/D (April and June 2021). Unlike v4.1 Recertification, this scheme is for buildings and interiors not previously certified in LEED.

Fabryczna Office Park B2 and B3 have received BREEAM International 2016 New Construction: Commercial (final) certificates at Outstanding level (April and June 2021). These are two of five certificates at this level for the period March 2021 - March 2022 (one of these, for Skysaw B, is at the interim stage, the others at the final stage).

The highest rating in BREEAM In-Use v6 (Outstanding) was awarded to Q22 last year (certificate only in the Asset Performance section, June 2021).

First Platinum level certification in LEED Commercial Interiors v4: Fabryczna Office Park - buildings B2 and B3 (July 2021) and Google office in Tertium Business Park A (August 2021). All three are located in Kraków.

Warsaw Unit is the first building precertified in the WELL v2 system (September 2021). As a result it is a building assessed in three systems: BREEAM International 2013 New Construction: Offices certificate (November 2021, Outstanding), WELL v2 Core & Shell pre-certification and WELL Health & Safety assessment (September 2021 and January 2022) and Green Building Standard.

First certification in LEED v4 New Construction (Silver) for MARS Petcare Błonie factory (October 2021).

In November 2021, the Malta Office Park complex in Poznań became the first building in the world to pass the re-measurement process in BREEAM In-Use v6 2020 International and achieved Excellent rating in Asset Performance and Management Performance categories.

V.Offices received the award for Best BREEAM Building in Central and Eastern Europe at BREEAM Summit 2022 in March this year. Last year the office building was certified at Outstanding level with one of the highest scores in the world: 98.87%.

GENERAL DATA

The parameter which best presents the image of sustainable, certified construction in Poland is the usable area of certified buildings, which is very dynamically approaching 30 million m². Currently, it is already 28.6 million m² ([Chart 1](#)), which gives a 24-percent increase over a year. A year earlier, the area was more than 5 million m² smaller.

In the current report, the number of certified buildings has already reached almost 1,400 ([Chart 2](#)). BREEAM maintains its leading position with 81% market share and, as mentioned earlier, this year's number of BREEAM certified buildings exceeded the number of all certified buildings in last year's report. Almost 16% of all buildings are certified in LEED, while the share of the other four certifications remains at around 1%.

It is common for one certification to cover several buildings in one complex. This data is also included in the chart below, which covers all certification systems and all building types. Importantly, it takes into account buildings being designed, under construction, as well as those existing before the certificate was issued. Pre-certified (LEED and WELL) and interim certified (BREEAM) buildings are also included. However, registered buildings are not included in the statistics.

The annual increase in the number of certified buildings was 23.5%, which is a smaller percentage increase than the year before. At the same time, it should be noted that in the analysed period there were 259 certified buildings, while the previous year the number was 255.

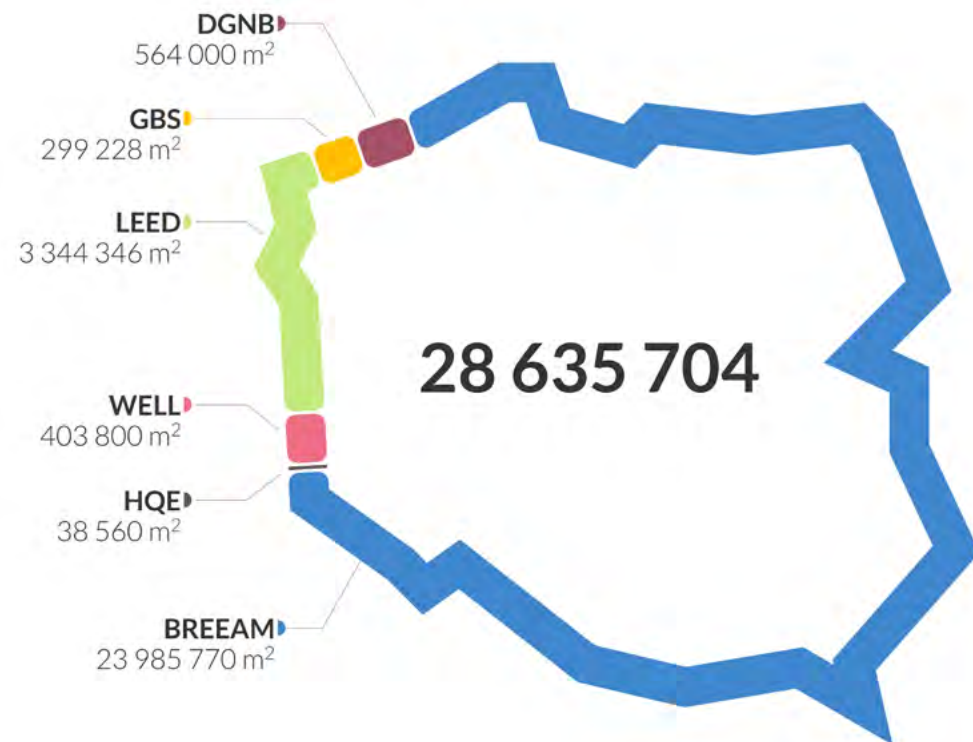


Chart 1. Usable floor area of certified buildings

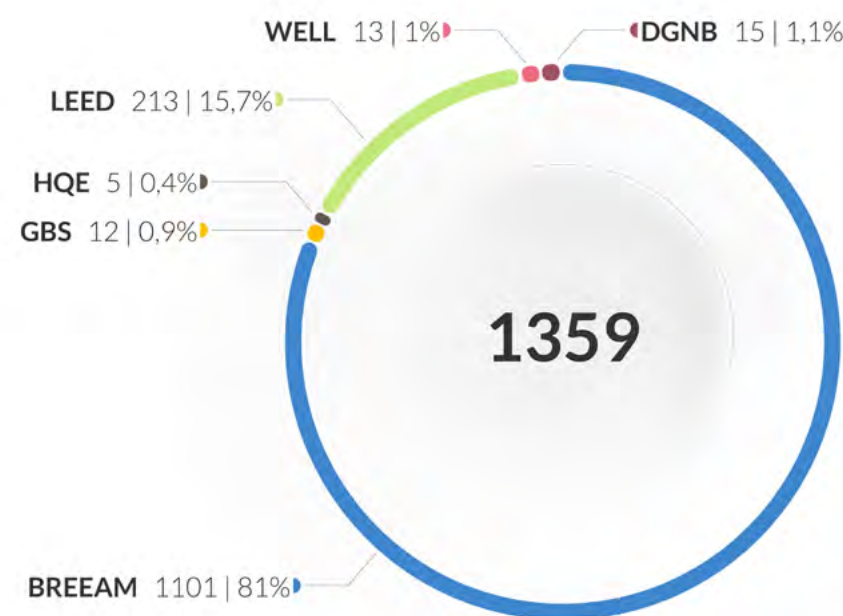


Chart 2. Number of certified buildings



Chart 3. Increase in number of buildings

ANALYSIS OF THE SYSTEMS

This section of the report presents an analysis of each of the certification systems separately.

BREEAM, which holds the largest market share at 81%, recorded an annual growth of 27% in the number of new certified buildings. Of the 259 total buildings that joined the list during the year, 236 were BREEAM certified.

To date, the largest number of certificates has been awarded under the BREEAM In-Use scheme (dedicated to existing buildings), however, it must be taken into account that the building is usually seeking two separate certificates (Part 1: Asset Performance and Part 2: Building Management) under this scheme,

therefore the total number of certificates awarded should be divided by two to obtain a reliable picture. To date, 523 BREEAM certificates have been awarded to new buildings. Of these buildings, 80% have already obtained the final certificate and 20% of the buildings have an interim certificate at design level. It is worth reiterating that the New Construction scheme is already represented on our market in four versions: Commercial, Industrial, Residential and Education.

The ratings achieved by investments certified in the BREEAM system remain at a consistently high level. The best grades - Very Good, Excellent and Outstanding constitute as much as 84% of all grades awarded ([Chart 5](#)).

LEED certification, the second most popular certification in Poland, has seen the same 12 percent increase in new certifications over the past year as the year before. LEED certification is represented in Poland by the Core & Shell and New Construction schemes for new buildings and Existing Building Operations & Maintenance for existing facilities. The Commercial/Retail Interiors scheme, on the other hand, is dedicated to tenants who can certify their offices in a given building. In addition to these schemes, the Schools and Warehouse & Distribution Center schemes are also used ([Chart 6](#)).

Like BREEAM, the LEED rating level is very high, with the two highest grades accounting for 92% of all results.

In the German DGNB system, 15 buildings have been certified so far, which in this case translates into a number of 6 certificates, as one of the certificates covers 10 buildings within one investment. This is exactly the same result as in a previous year. In the French HQE system, no new buildings have been certified since the end of 2018. It still covers five residential buildings. In WELL system in Poland there are 14 multi-criteria certificates and 43 Health & Safety Rating. As mentioned earlier, this rating is not taken into account in the overall analysis due to its single-criteria nature. The Polish Green Building Standard system is represented by 12 certified buildings, three more than last year.

1197

IN-USE 663

NEW CONSTRUCTION 523

REFURBISHMENT 8
COMMUNITIES 3

Chart 4. BREEAM certified buildings

OUTSTANDING 2,4%

EXCELLENT 32,8%

VERY GOOD 49,4%

GOOD 12,5%

PASS 2,8%

ACCEPTABLE 0,1%

Chart 5. Summary of BREEAM awarded grades

236

CORE & SHELL 115

NEW CONSTRUCTION 48

COMMERCIAL INTERIORS 43

EXISTING BUILDINGS &
RECERTIFICATION 23

WAREHOUSE & DISTRIBUTION
CENTER 5

SCHOOLS 2

Chart 6. LEED certified buildings

PLATINUM 36%

GOLD 56%

SILVER 6%

CERTIFIED 2%

Chart 7. Summary of LEED awarded grades

NEW AND EXISTING BUILDINGS

For a complete picture of the Polish certified buildings market, it should be also analysed in terms of both newly built and existing buildings. Most certification systems offer the possibility to evaluate both types of buildings. While schemes dedicated to new developments can be considered similar to each other, those dedicated to existing buildings differ significantly in terms of scope and cost, which has a direct impact on the number of certified buildings.

Chart 8 shows the number of new and existing certified buildings. The share of new buildings in the total number of certified buildings is now 63% - this is 2% less compared to the previous year. Similarly, a 2% increase in the share was recorded by certified existing buildings.

The annual increase in the number of new certified buildings was 19.5% (the previous year it was 32%), which equals 140 buildings. In turn, the increase in the certification of existing buildings was 31% (119 buildings), compared to a 27% increase the year before.

Details of the usable floor area broken down into new and existing buildings are presented in **Chart 9**. As of the date of the analysis, the usable floor area of buildings that have already been certified at the design stage is 59%, which is 2% lower than in the previous year. Thus, the existing buildings occupy 41% of the certified area.

Over the year, 2.9 million m² of certified floor space was added in new buildings and 2.7 million m² in existing buildings.

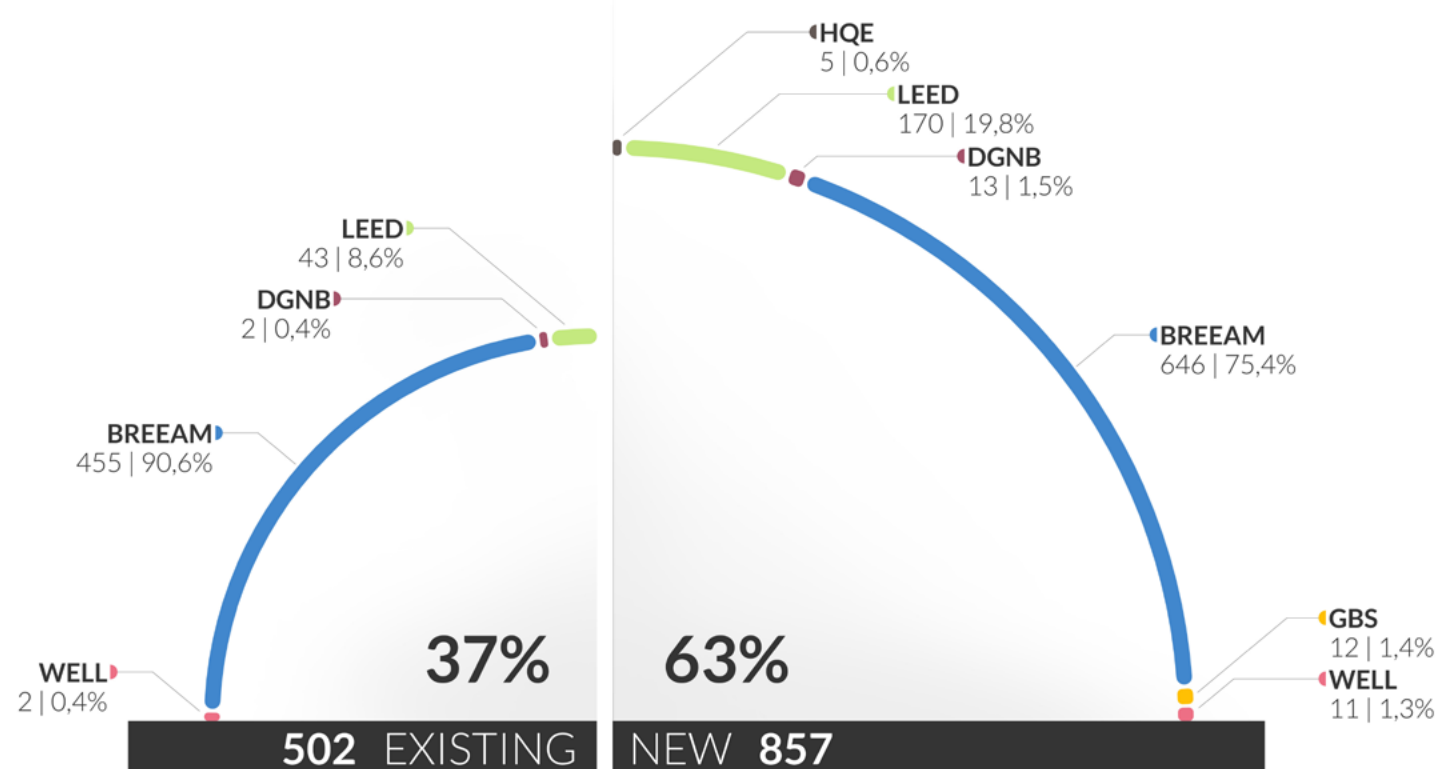


Chart 8. Newly constructed and existing certified buildings

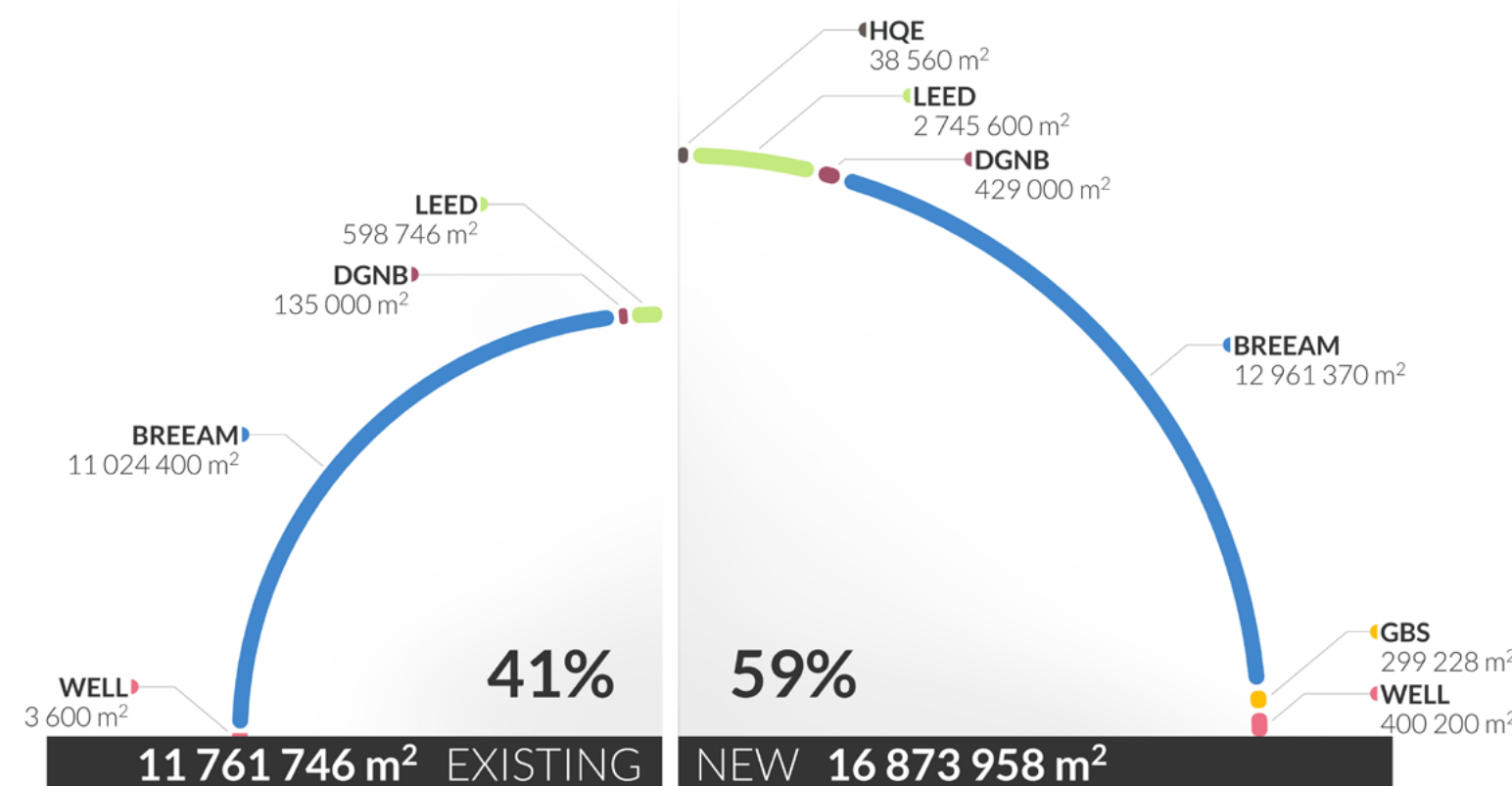


Chart 9. The usable floor area of newly constructed and existing certified facilities

BREAKDOWN OF CERTIFIED BUILDINGS BY SECTOR

As the building certification market in Poland develops and matures, we can observe an annual decline in the share of the office property sector, which initiated the certification standard in Poland. Office buildings are still in the leading position, with a 48% share, but the logistics sector is persistently trying to „catch up” reaching already 29% share this year.

The share of retail properties is slightly decreasing and currently accounts for 13% of certified buildings.

The residential sector has slightly increased its share to 9%, while hotels represent, as last year, 1.5% and schools 0.5% of all certified buildings.

The next chart shows the breakdown of certified floor space by industry. This shows a 5% decrease in the share of certified office space and a 4% decrease in the share of retail space in favour of warehouse space compared to last year.

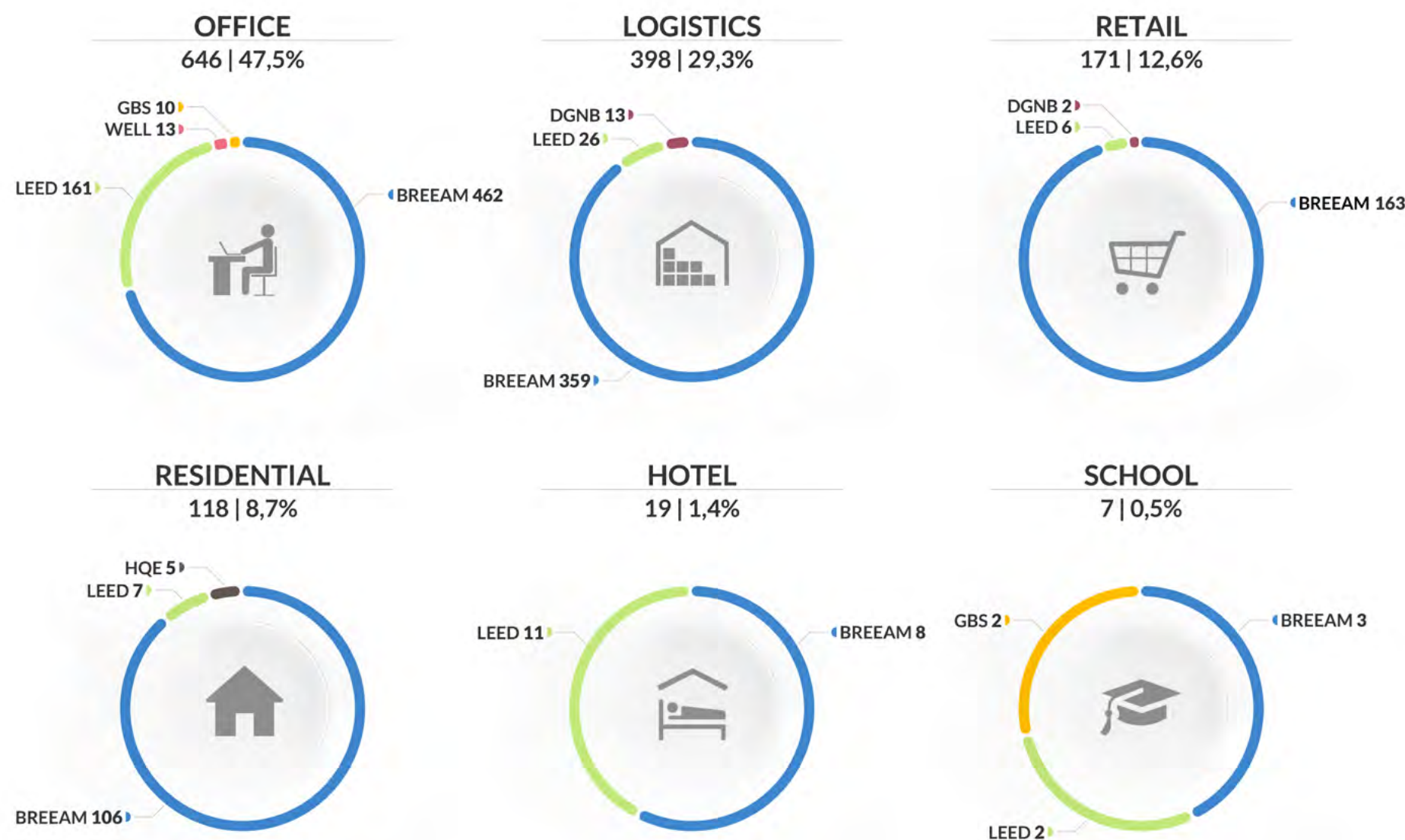


Chart 10. Breakdown of certified buildings by sector

28 635 704 m²

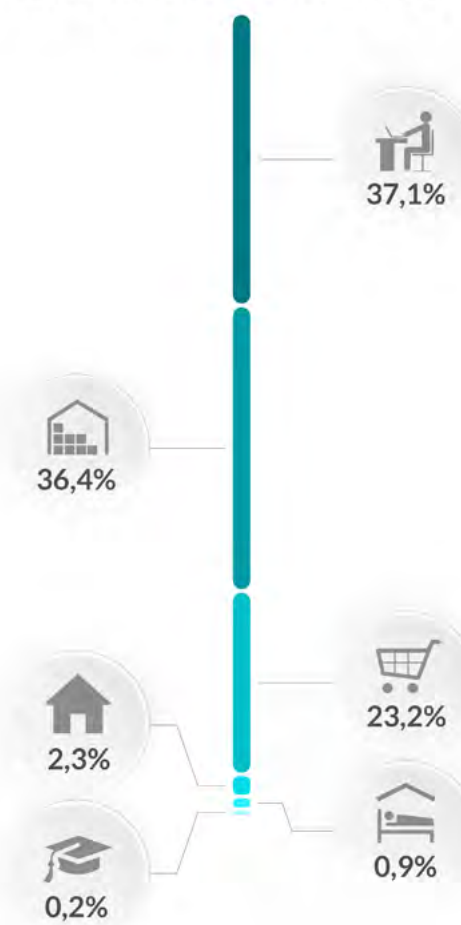
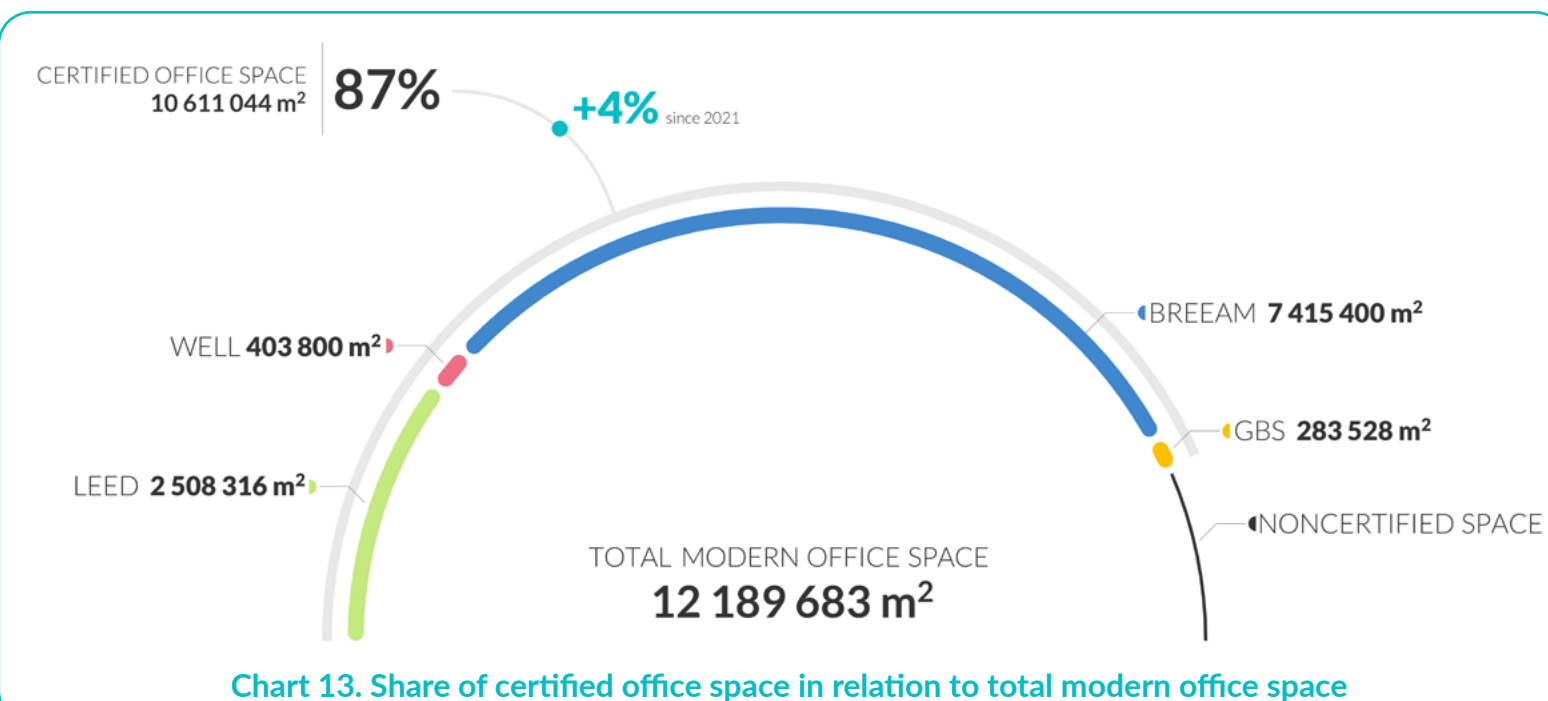


Chart 11. The usable floor area of certified buildings by sector

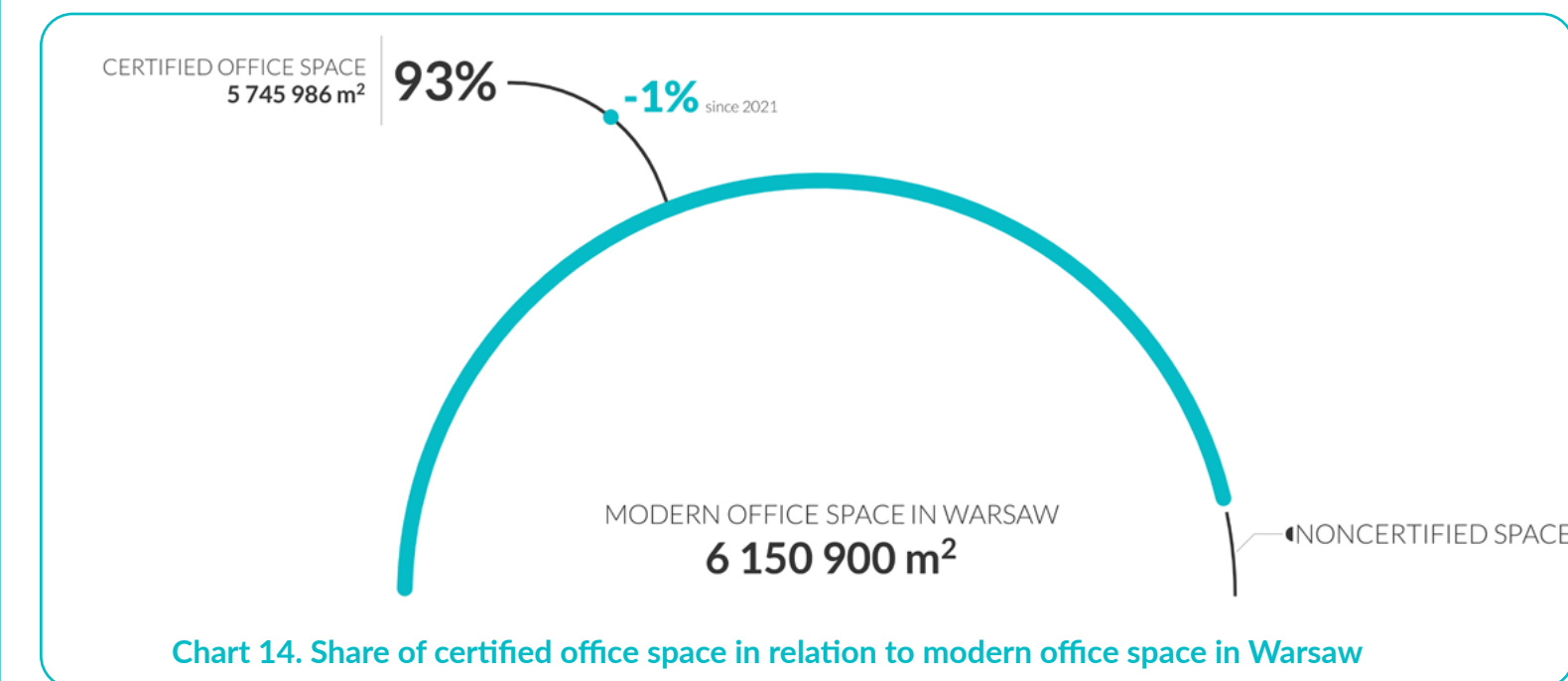
When analysing individual industries, it is worth highlighting the annual increase in the number of certifications. Since last year, the leader of growth is the warehouse and industrial sector, which recorded as many as 171 new certified facilities, a record increase of 75% compared to the previous year.



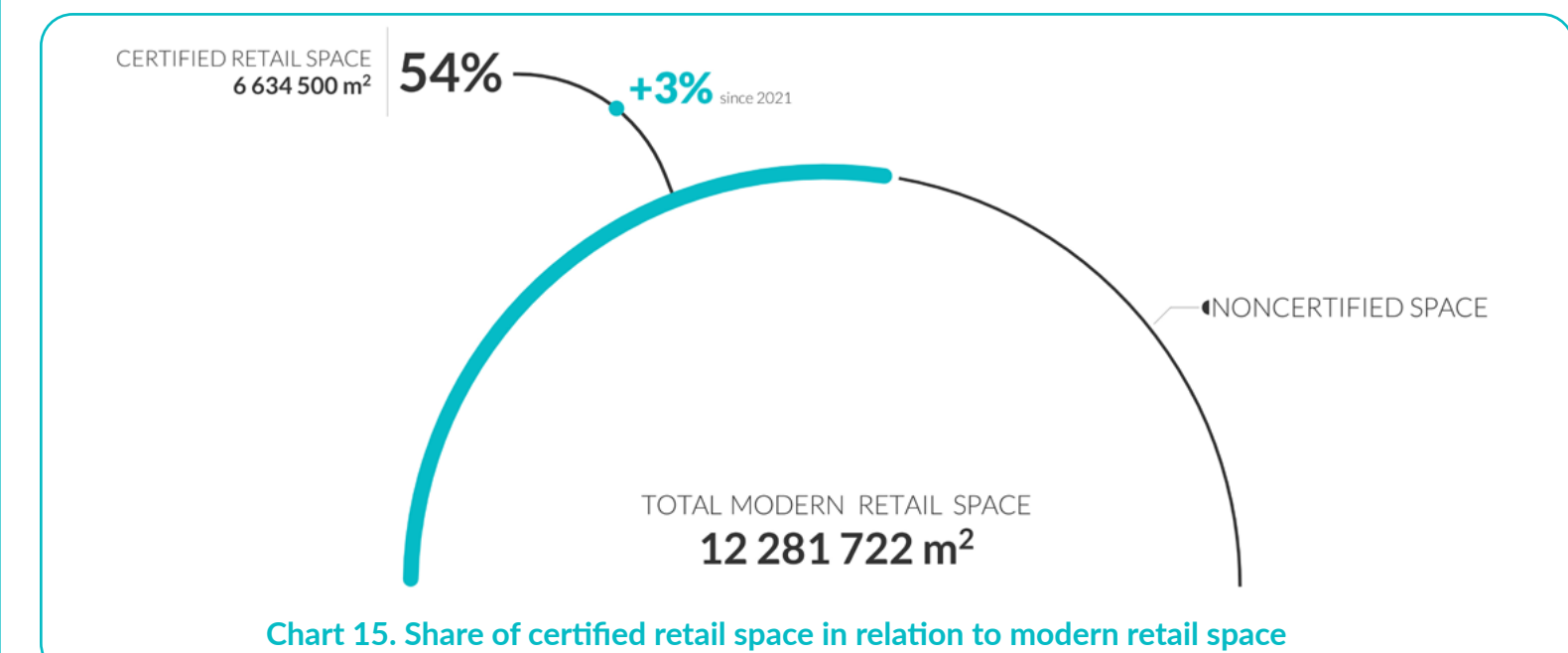
At the end of 2021, almost 12.2 million m² of modern office space¹ was available in Poland, of which as much as 87% was certified space, 4% more than in the previous year. Today we can confidently say that no new office investments are being built that are not subject to multi-criteria certification.



Among Warsaw's office buildings, there is a steady level at around 93% of certified buildings out of a total modern office space in Warsaw of over 6.1 million m² by the end of 2021².



Certified retail space last year exceeded half of total modern retail space for the first time, and this share was increased by a further 3% in this year's list, reaching 54% of the total stock of modern retail space, which reached approximately 12.3 million m² by the end of 2021³.



¹ Colliers, *Market Insights. Raport roczny 2022*, <<https://www.colliers.com/pl-pl/research/market-insights-annual-report-2022>> [access 05.04.2022]

² CBRE, *Poland Real Estate Market Outlook 2022*, <<https://www.cbre.pl/pl-pl/raporty/Poland-Real-Estate-Market-Outlook-2022>> [access 05.04.2022]

³ Knight Frank, *Polska. Review 2021 & Outlook 2022. Rynek nieruchomości komercyjnych*, <<https://www.knightfrank.com.pl/research/review-2021-outlook-2022-pl-8874.aspx>> [access 05.04.2022]

WAREHOUSE AND INDUSTRIAL FACILITIES

For the third year in a row, we have observed dynamic growth of certified space in the warehouse sector. It is caused by a general trend of increasing demand for warehouse space in Poland. This is largely supported by Poland's strategic location, investments in the development of transport infrastructure and increased demand, especially during the pandemic, from the e-commerce sector.

While there were 86 certified buildings in this sector the year before, a record 171 buildings were certified between March 2021 and March 2022, bringing the total number of buildings in this sector to almost 400 ([Chart 16](#)).

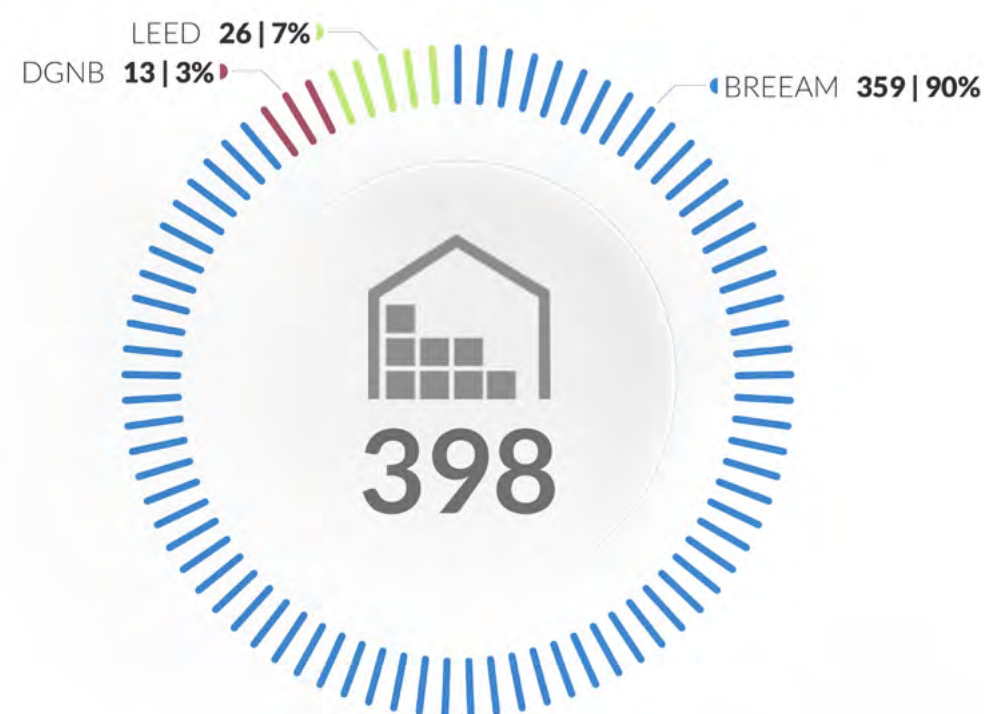


Chart 16. Warehouse and industrial buildings - a breakdown of certification schemes

Analysing the share of certified warehouse space in the total modern warehouse space⁴, an annual increase of 4 million m² of certified space can be seen. Thanks to this increase, the share of certified space in this sector is already at 41%, compared with 28% the year before ([Chart 17](#)).

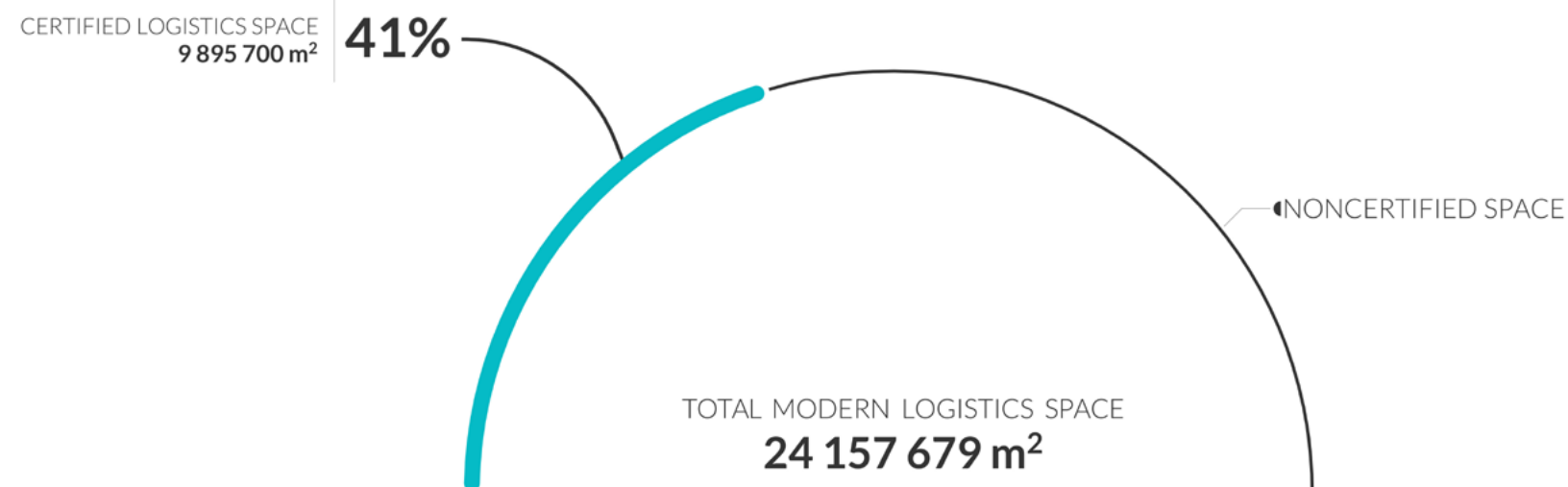


Chart 17. Share of certified warehouse space in relation to modern warehouse space

The percentage increase in certified industrial and warehouse space between March 2021 and March 2022 was 66% (compared to 76% a year earlier, however calculated from a much lower base).



Chart 18. Annual growth of certified warehouse and industrial space

⁴ This section aggregates warehousing and industrial buildings, so for the purpose of Chart 17 all industrial buildings have been subtracted and only warehousing and logistics buildings remain.

RESIDENTIAL BUILDINGS

The residential sector continues to show interest in multi-criteria certification. Over the year, 29 new buildings were added. As of the date of the analysis, residential buildings were certified in three schemes and the number of total residential buildings certified to date was 118 ([Chart 19](#)). There has been a 20% increase in certified residential space compared to a 22% increase in the previous year.

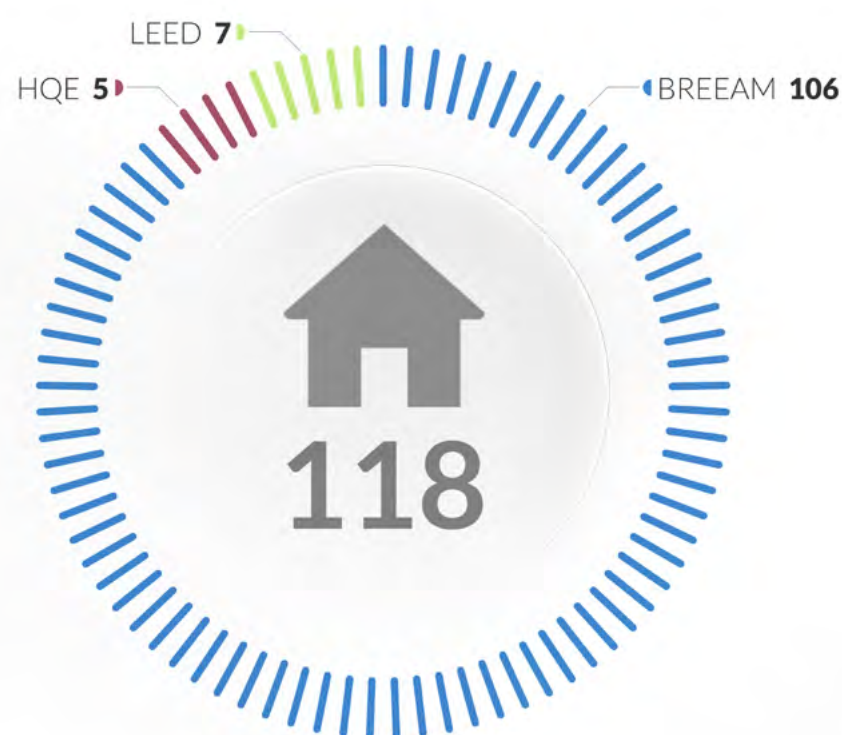


Chart 19. Number of certified residential buildings per certification scheme

The Polish Green Building Council developed and introduced last year the Polish multi-criteria evaluation for residential buildings ZIELONY DOM. The certificate distinguishes investments of high ecological quality and energy efficiency, as well as the associated reduction of operating costs. It was created out of the need to provide developers and investors with a simple yet ambitious tool to highlight the quality of residential projects and consciously join the green building industry in Poland. Currently, the first projects are already registered in the system, but the methodology of this report does not allow for registrations to be included in the compilation, so they are not included in the aggregate analysis.

However, we can share some important data: the registered residential projects comprise 71 buildings with 478 dwellings in almost 35 thousand sqm of sustainable living space. It is worth noting that the registered projects realise high energy efficiency in buildings through the use of heat pumps for heating and domestic hot water preparation and mechanical ventilation systems with recuperation, both in single and multi-family buildings. The solutions used in the submitted projects clearly show how much potential there is in Polish certification.

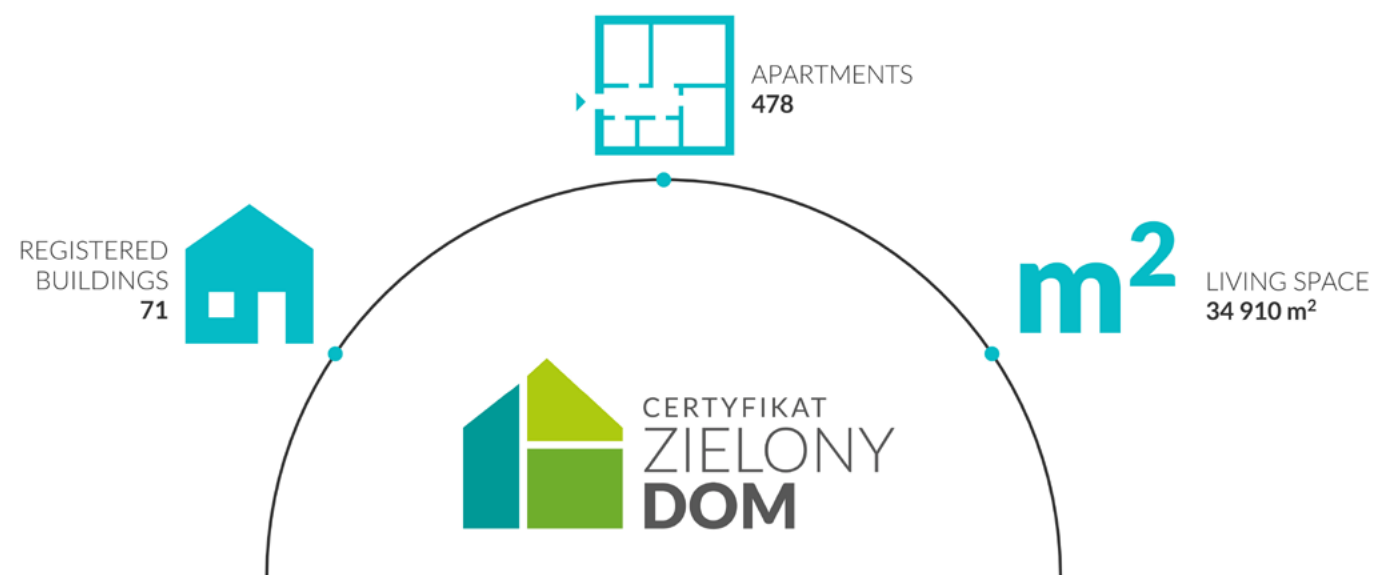
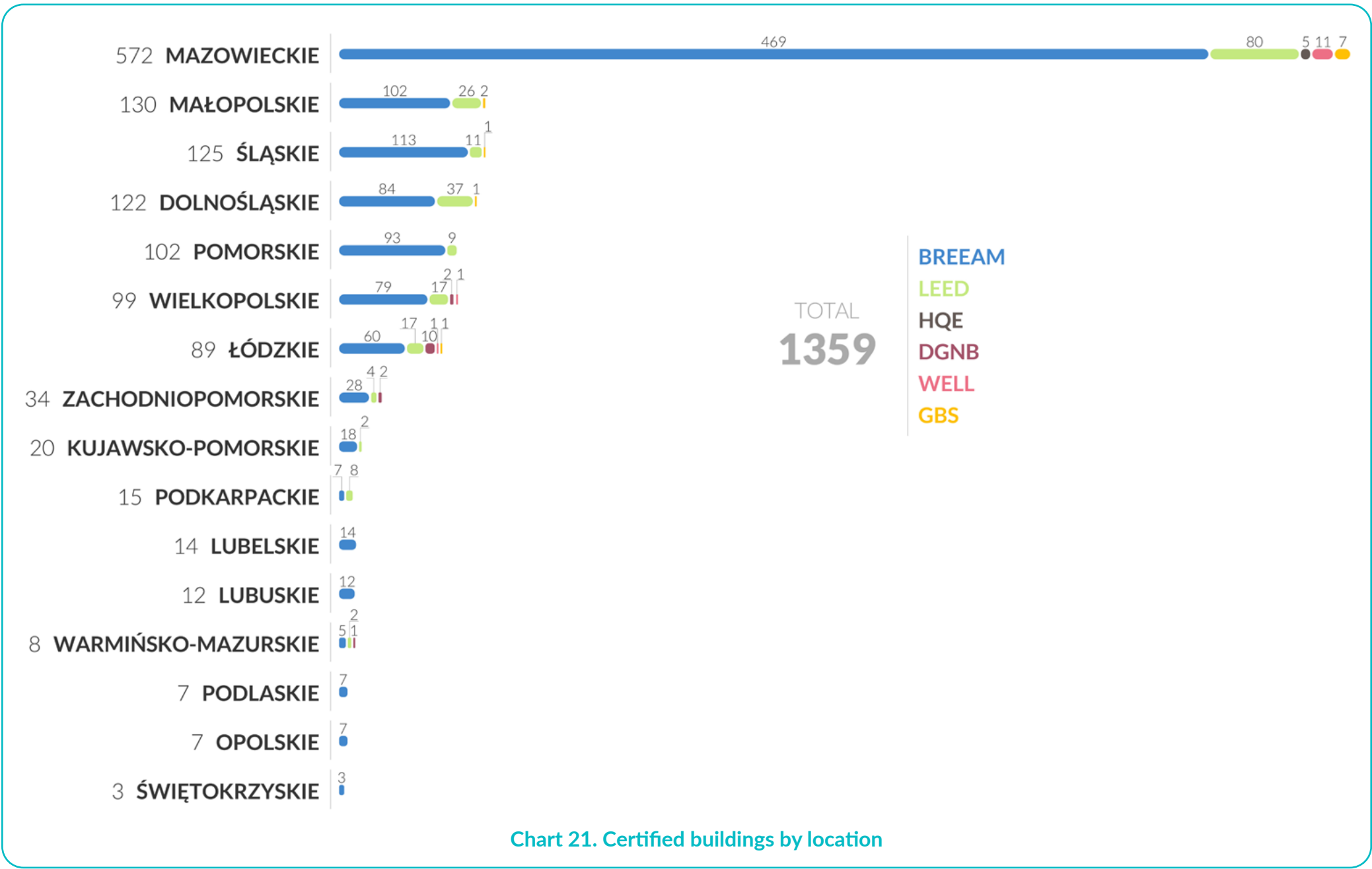


Chart 20. Projects registered under ZIELONY DOM certification

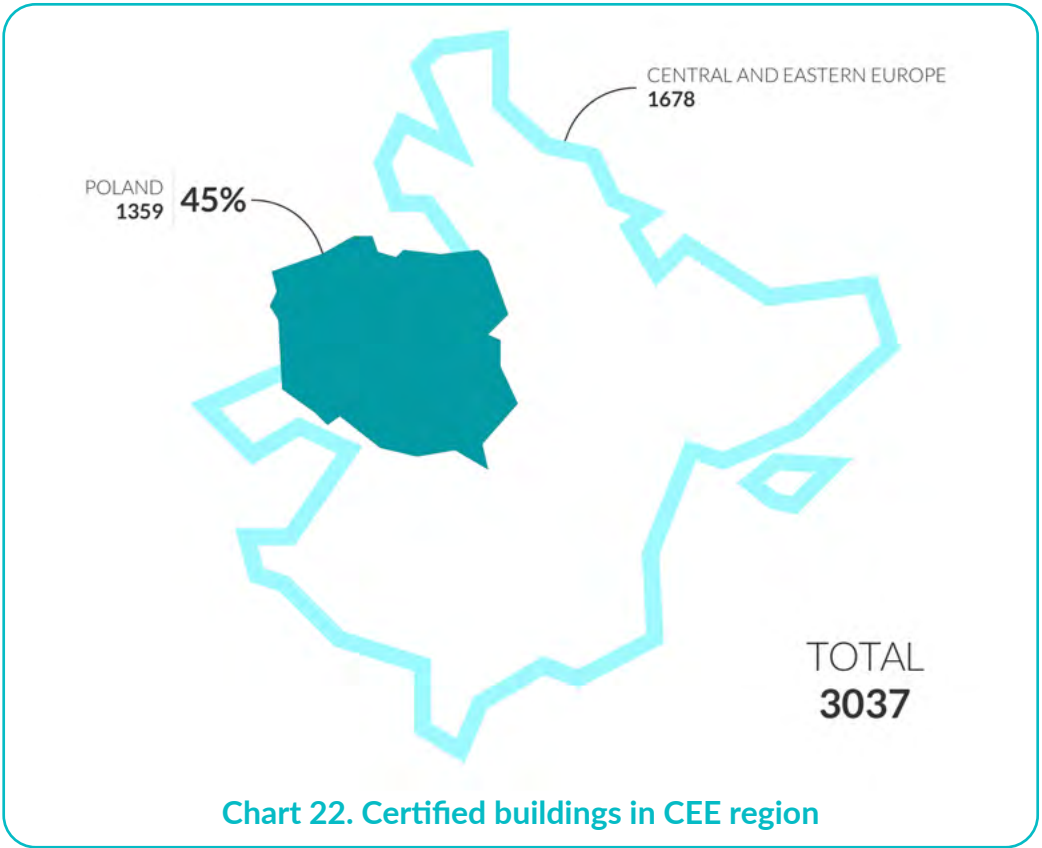
ADMINISTRATIVE BREAKDOWN OF CERTIFIED BUILDINGS

In a breakdown by voivodeship, Mazowieckie invariably remains in first place. This year its share fell to 42% (3% less than last year). The next three voivodships are Małopolskie, Śląskie and Dolnośląskie, with practically the same, 9% share.



POLAND - THE LEADER IN CENTRAL AND EASTERN EUROPE

As every year since the beginning of analysing the certified buildings market, Poland remains the leader in terms of the number of such buildings among the countries of Central and Eastern Europe⁵. Currently, 45% of all certified buildings from the CEE region are located in our country.



⁵ At the time of this analysis, the following numbers of certified buildings for each country were sourced from publicly available databases of BREEAM, DGNB, HQE, LEED and WELL systems: Czech Republic - 562, Romania - 375, Hungary - 262, Slovakia - 148, Lithuania - 97, Bulgaria - 78, Serbia - 44, Estonia - 43, Latvia - 38, Ukraine - 16, Croatia - 9, Slovenia - 5, Belarus - 1.



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