



The market of public tenders for education buildings in Italy. The role of the EP Contracts

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WHAT IT WILL IT BE ABOUT

GENERAL BACKGROUND
THE POTENTIAL MARKET

THE CURRENT LEVELS OF
EXPENDITURE

ACTORS AND TYPOLOGIES
OF WORKS

THE MODELS



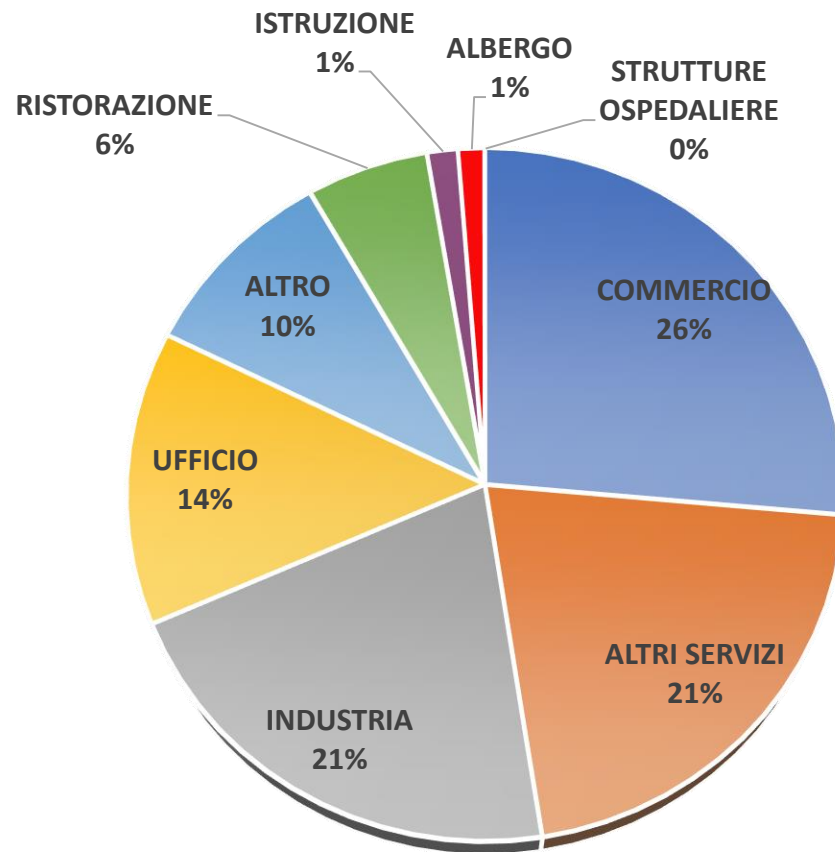
ITALIAN BUILDING STOCK IN 2018

	NUMBER			SURFACE (million of square meters)		
	Buildings with exclusive or prevalent use	UIU in buildings with mixed use	Total UIU	Buildings with exclusive or prevalent use	UIU in buildings with mixed use	Total UIU
RESIDENTIAL	12.420.403	-	31.996.915	5.587		3.049,8
OFFICE	74.360	662.860	737.220	63,0	72,8	135,8
BUILDING FOR HEALTH (HOSPITALS)	1.283	-	1.283	32,9	-	32,9
EDUCATION	56.049	21.373	77.422	84,3	8,6	93
HOTELS	27.143	39.073	66.216	36,6	30,6	67,2
RESTAURANT	32.380	270.179	306.274	7,2	32,6	39,8
COMMERCE	259.951	1.162.263	1.422.214	287,1	82,7	369,8
INDUSTRY	297.972	832.330	1.130.301	446,0	489,0	935,0
OTHER SERVICES	128.486	1.008.556	1.138.325	25,1	121,8	146,9
OTHER	-	-	508.740	-	-	201,1
TOTAL NON RESIDENTIAL	877.623	3.996.632	5.387.994	982	838	2.021
TOTAL	13.298.026	3.996.632	37.384.909	6.569	838	5.071

Other services: public and private health care facilities, analysis laboratories, physiotherapy, museums and other buildings with cultural exhibitions, cinemas and theatres, barracks and prisons, post offices, dental surgeries, veterinary surgeries, etc.

Other: warehouses, garages, parking spaces, carports not belonging to another type of building unit, sports facilities, factories, electrical substations, ports, airports, cemeteries, etc.

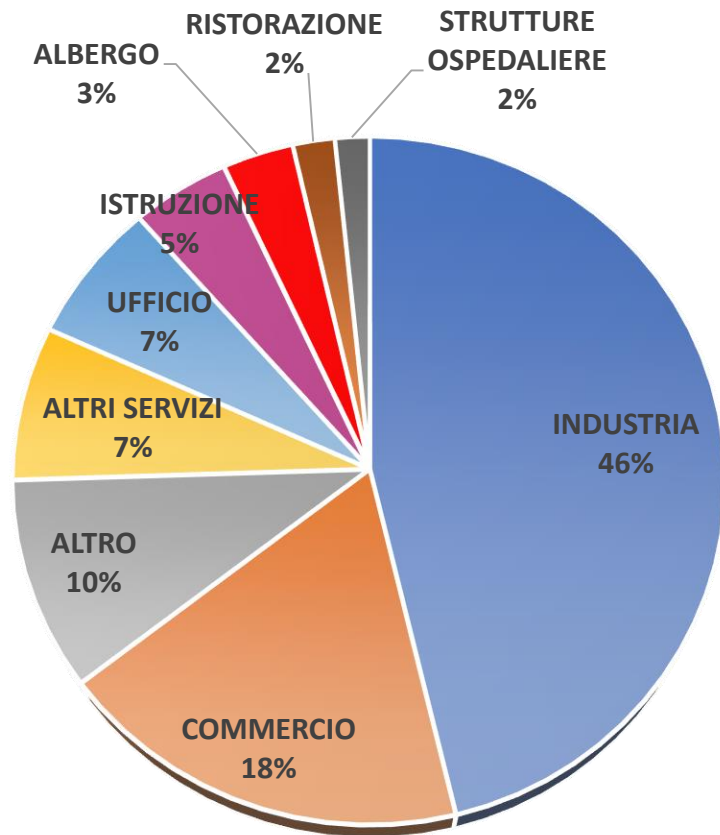
NUMBER OF REAL ESTATE UNITS



	NUMBER OF UNITS
COMMERCE	1.422.214
OTHER SERVICES	1.138.325
INDUSTRY	1.130.301
OFFICES	737.220
OTHER	508.740
RESTAURANTS	306.274
EDUCATION	77.422
HOTELS	66.216
HOSPITALS	1.283
Total	5.387.994

Source: Cresme for ENEA for data referred to education buildings, offices, hotels, restaurants, commercial buildings. Cresme estimate for the other typologies

MILLION OF SQUARE METERS OF SURFACE



	MILLION OF SQM
INDUSTRY	935
COMMERCE	370
OTHER	201
OTHER SERVICES	147
OFFICES	136
EDUCATION	93
HOTELS	67
RESTAURANTS	40
HOSPITALS	33
Total	2.021

Source: Cresme for ENEA for data referred to education buildings, offices, hotels, restaurants, commercial buildings. Cresme estimate for the other typologies

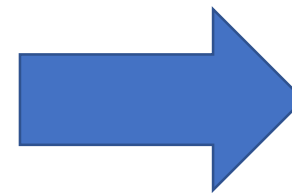
THE LEVEL OF EXPENDITURE: THE MARKET OF TENDERS FOR PUBLIC WORKS IN THE EDUCATION BUILDING SECTOR

LEVEL AND TREND

KIND OF ACTIVITY

THE ACTORS

THE CONTRACTUAL
MODELS



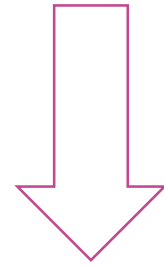
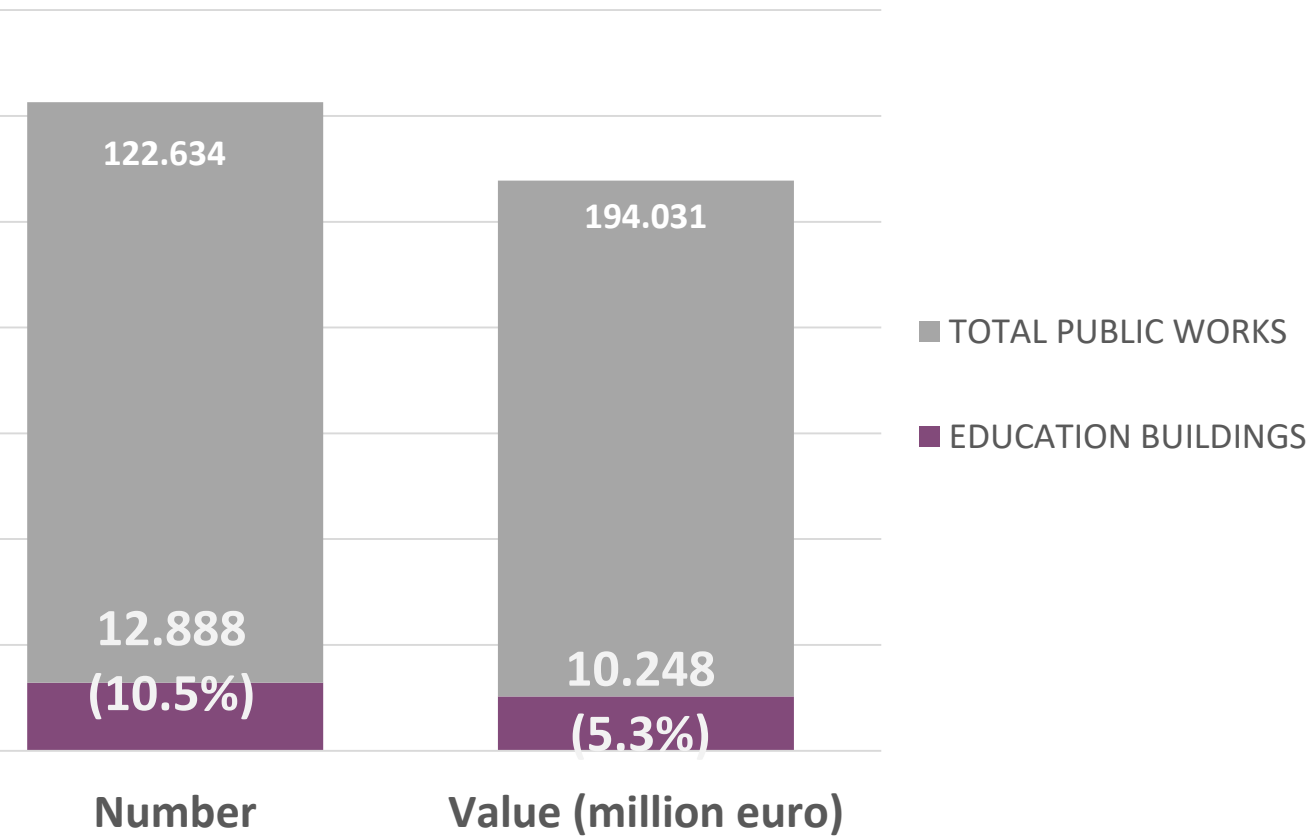
FOCUS ON PPP FOR
ENERGY EFFICIENCY
WORKS

THE MARKET OF PUBLIC TENDERS FOR EDUCATION BUILDINGS IN ITALY



TREND AND LEVELS

Level 2015-2020

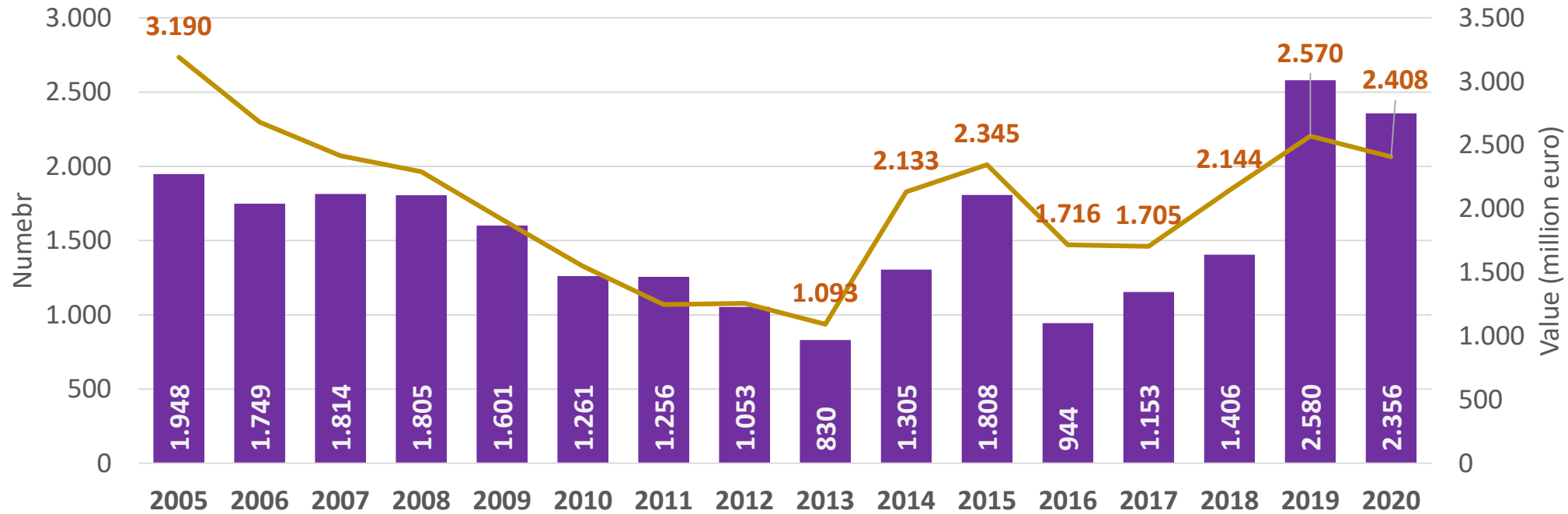


Average growth rate 2015-2020

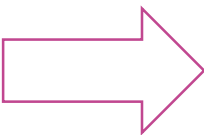
	NUMBER	VALUE
EDUCATION	2.4%	+14.2%
TOTAL PUBLIC WORKS	+4.3%	+13.1%

THE MARKET OF PUBLIC TENDERS FOR EDUCATION BUILDINGS IN ITALY

TREND AND LEVELS



- A VARIABLE MARKET, DESCRIBING THE CYCLE OF CRISIS, BUT WITH A CONSISTENT ROLE WITHIN THE TOTAL MARKET OF TENDERS FOR PUBLIC WORKS
- NUMBER: FROM 7.5% IN 9 TO 12.6% IN 2015
- VALUE: FROM 4.4% IN 2018 TO 6.5% IN 2007



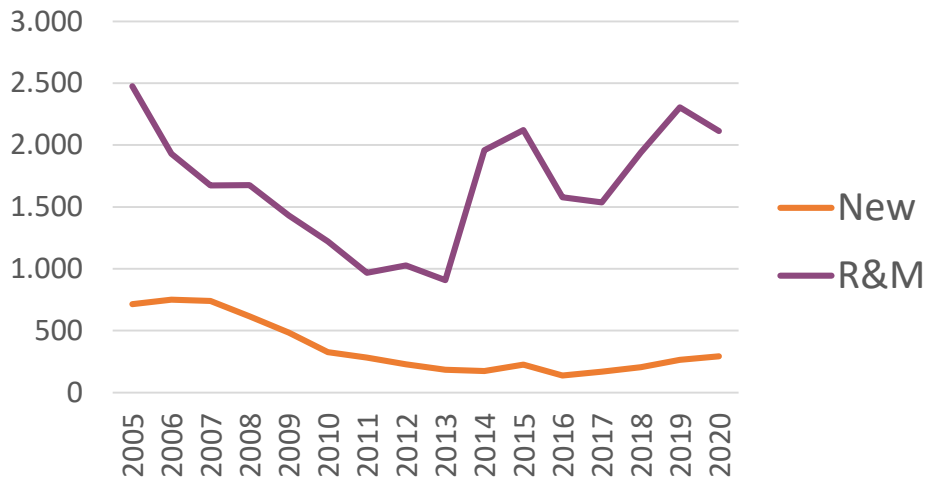
THE MARKET OF PUBLIC TENDERS FOR EDUCATION BUILDINGS IN ITALY



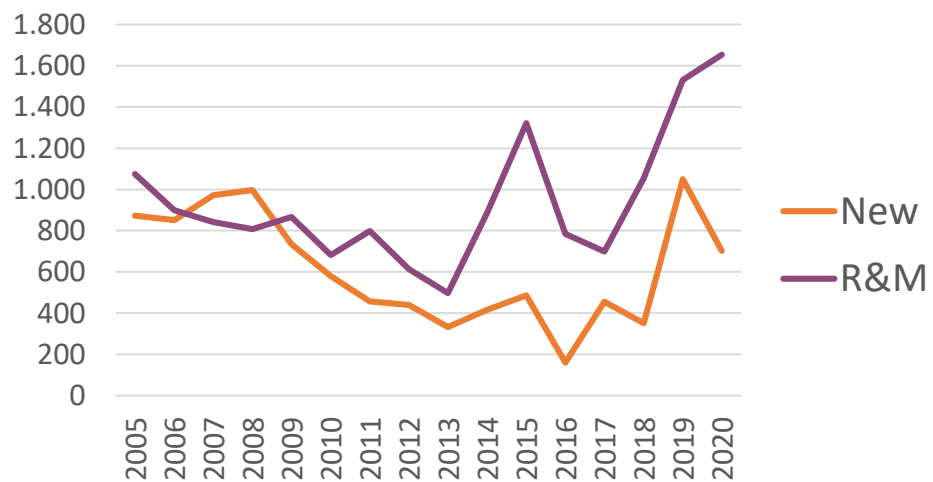
New

R&M

NUMBER



VALUE (MILLION EURO)



TOTAL LEVEL 2015-2020

	NUMBER	VALUE
New	1.291	3.200 mill €
R&M	11.597	7.400 mill €

AVERAGE GROWTH RATE 2015-2020

	NUMBER	VALUE
New	+9.1%	+52.2%
R&M	+1.7%	+10.5%



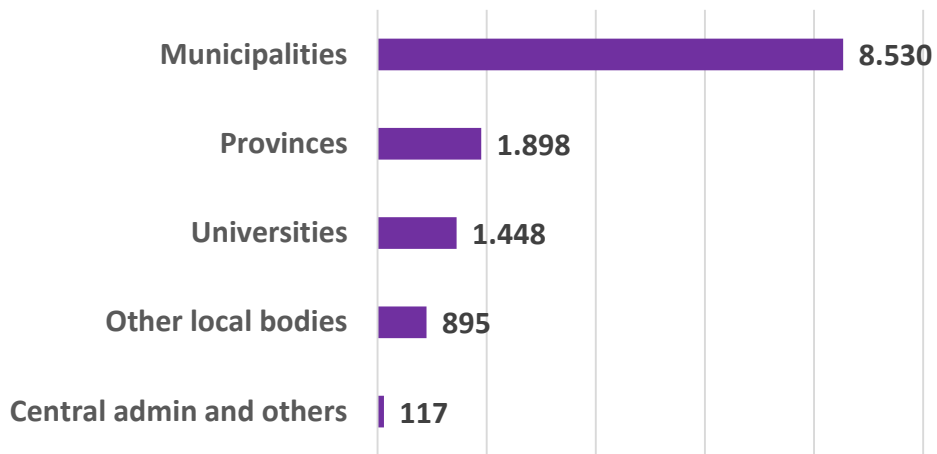
THE MARKET OF PUBLIC TENDERS FOR EDUCATION BUILDINGS IN ITALY

ACTORS

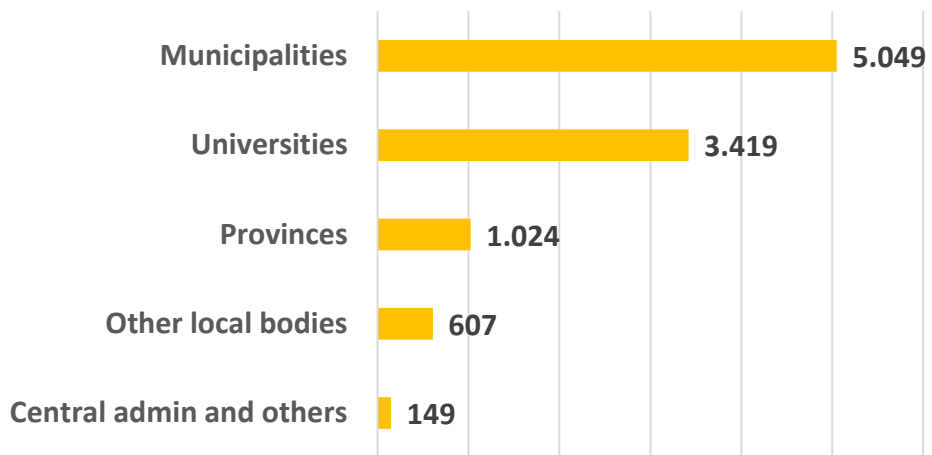


TOTAL LEVEL 2015-2020

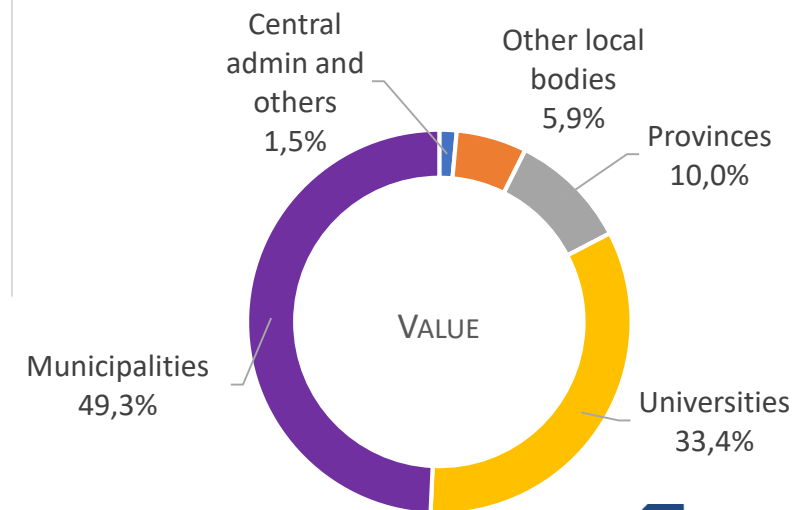
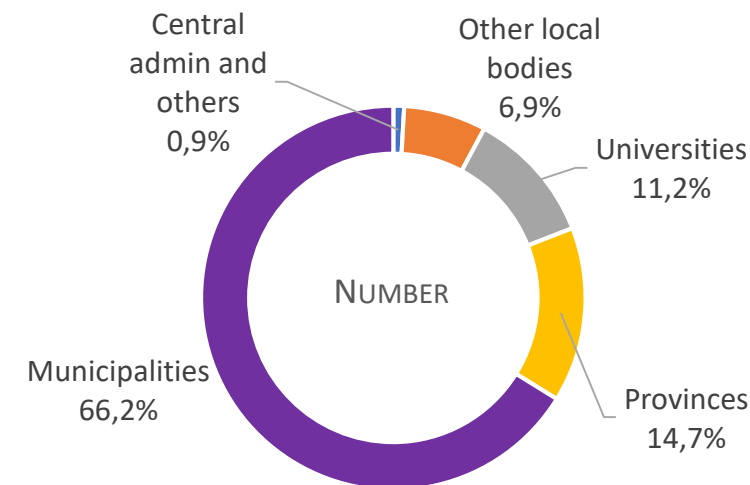
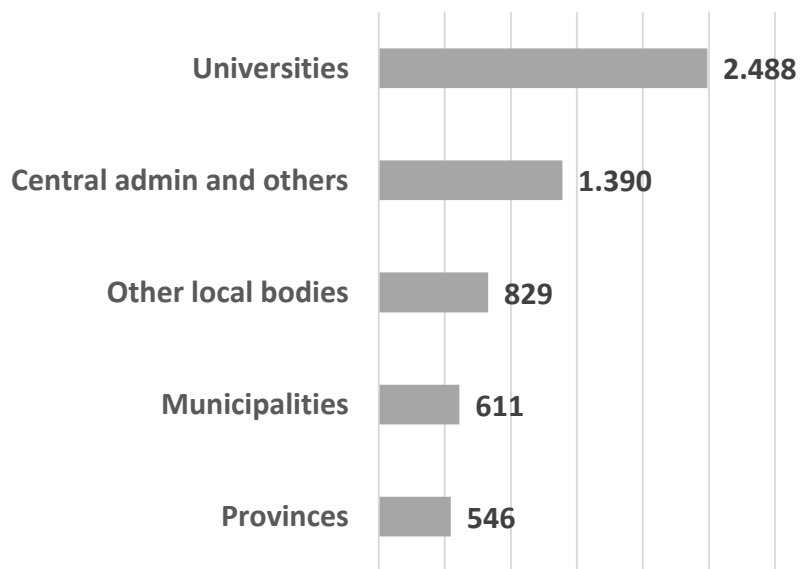
Number



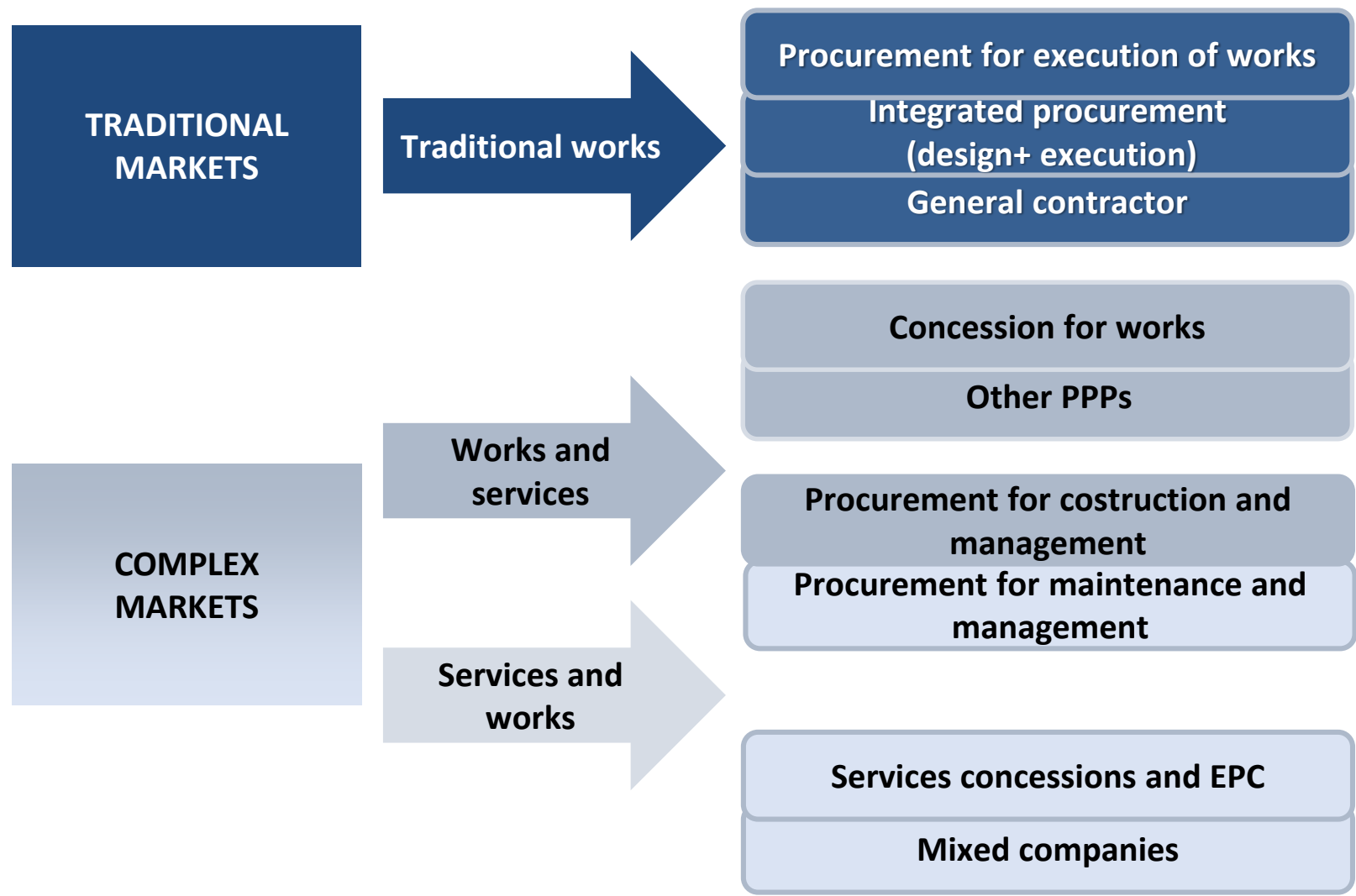
Value (million €)



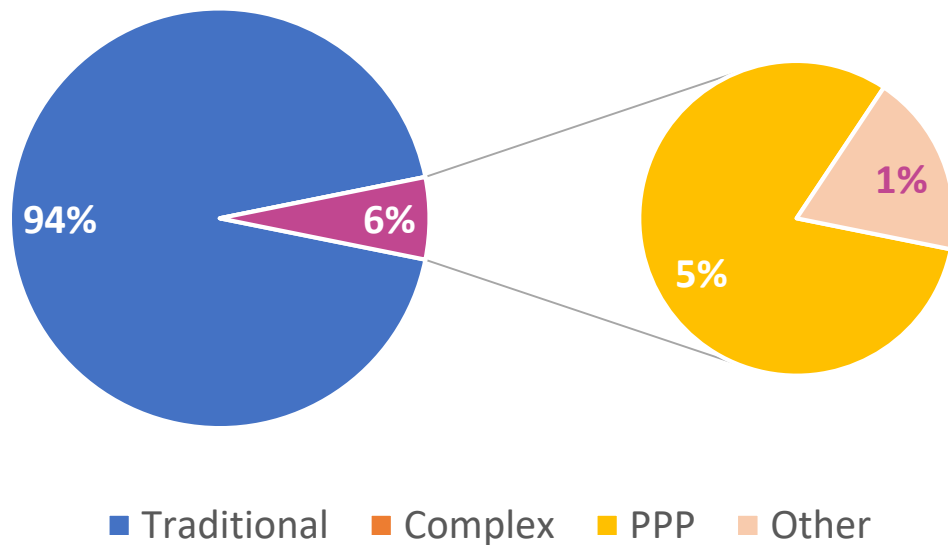
Average value ('000 €)



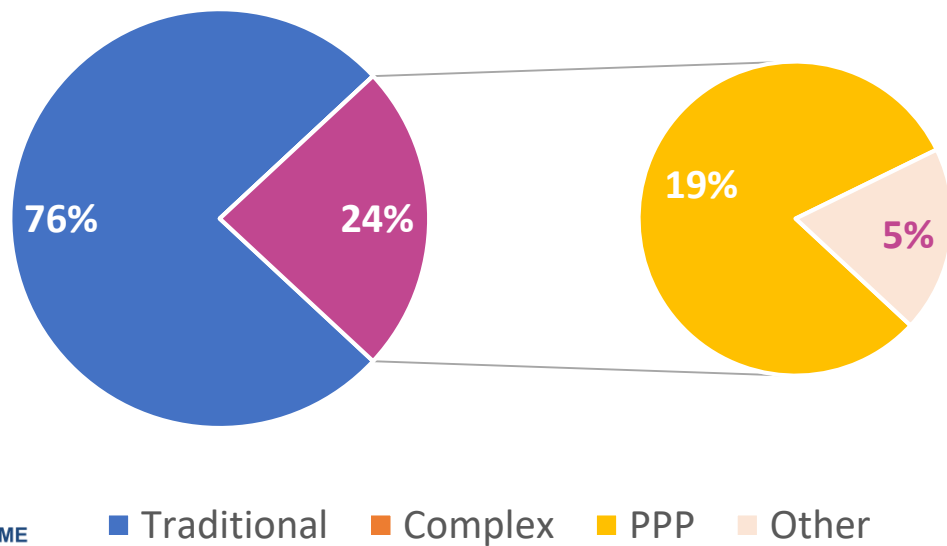
A complex system of different contractual models



NUMBER



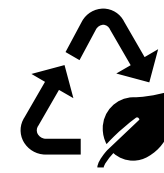
VALUE



THE MARKET OF PUBLIC TENDERS FOR EDUCATION BUILDINGS IN ITALY

The model of contracts

	TOTAL NUMBER 2015-2020	TOTAL AMOUNT 2015-2020 (MILLION €)
Total	12.888	10.248
Traditional	12.074	7.804
Complex	814	2.443
PPP	661	1.975
Other	153	468



PROBLEM OF A PRECISE DEFINITION OF THIS MARKET

Traditional works
Total 2015-2020

Number

5.186

Value (mill€)

3.839

Average (€)

757.000

PPP
Total 2015-2020

Number

39

Value (mill€)

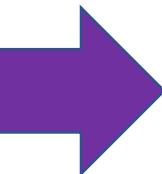
671,7

Average (€)

17.220.000

0,75%

17,5%



TENDER OF PPP FOR ENERGY EFFICIENCY INTERVENTION IN THE EDUCATION BUILDINGS



EE RENOVATION

PPP
Total 2015-2020

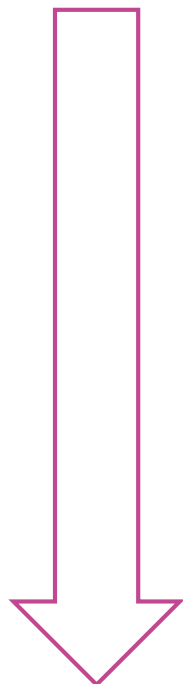
Number	Value (mill€)	Average (€)
39	671,7	17.220.000

ENERGY EFFICIENCY
“PURE OR PREVALENT”

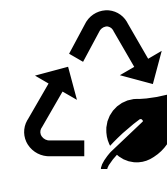
Number	Value (mill€)	Average (€)
26	342,6	13.160.000

MIX OF INTERVENTIONS

Number	Value (mill€)	Average (€)
13	329,4	25.340.000



ENERGY EFFICIENCY “PURE OR PREVALENT”



EE RENOVATION

I.N.Ri.M. – National Institute for Metrological research of Turin

A mixed concession of works and goods and the energy performance service (EPC) for the implementation of winter air-conditioning, internal and external lighting and the energy management of the buildings

2.695.351€
(of which 1.600.351€ for works)

Tender published November 2019 – award published May 2020

Municipality of Oderzo

Selection of an Energy Service Company (ESCO) for the assignment of a mixed goods and services concession for the renovation works including seismic upgrading and energy requalification of the Amalteo school complex owned by the municipality

4.384.582€
(value of the concession on the basis of the total revenues indicated in the business plan)
of which
3.715.549€ for works

Tender published September 2020 – award published November 2020

Municipality of Guiglia

Energy plus service for the energy requalification of the primary and middle school building, located in via San Geminiano 283

481.595€
(total value)
of which 379.833€ for works

Tender published June 2020 – award published September 2020



thank you for your attention!
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