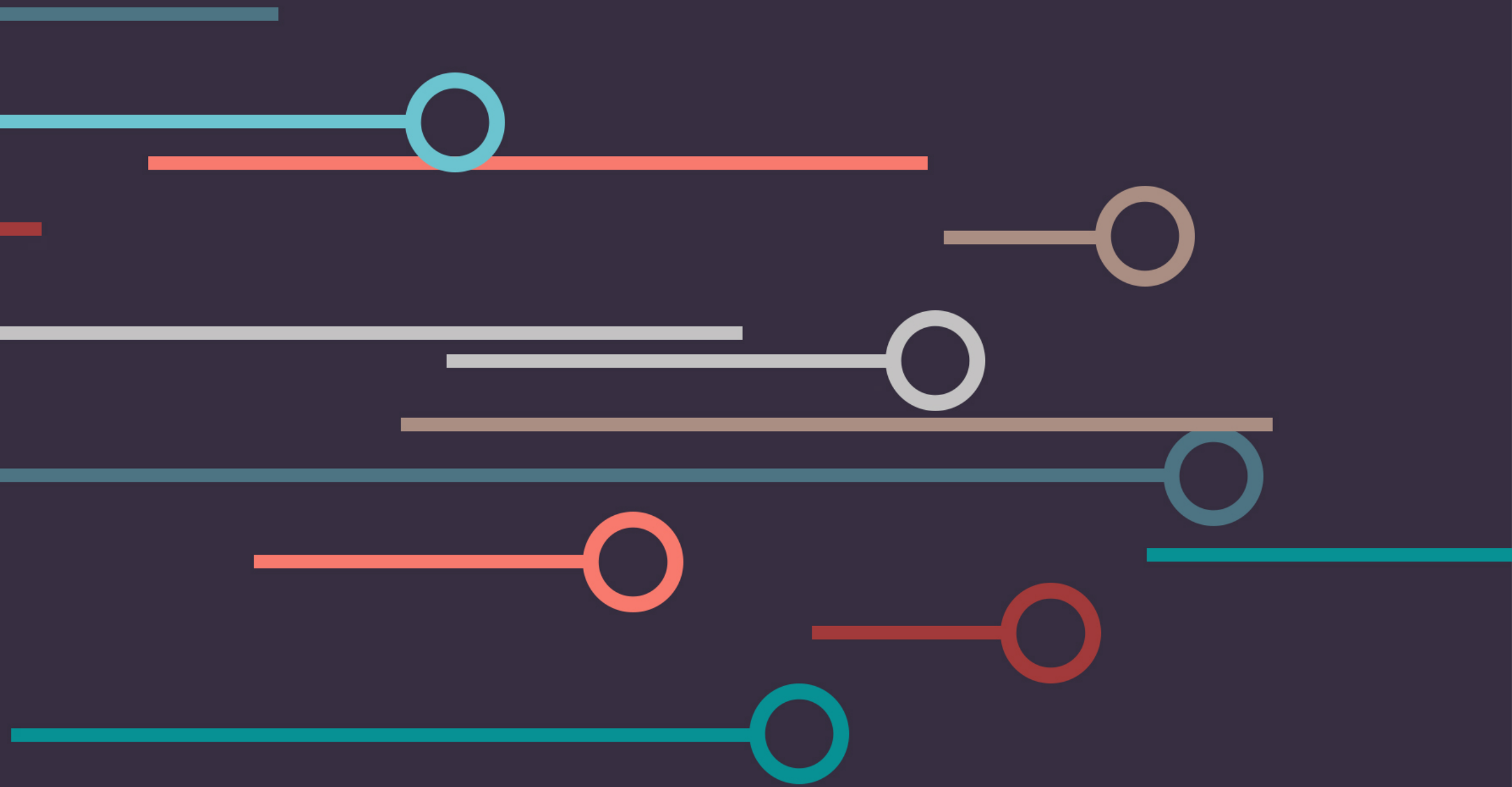


SUSTAINABLE CERTIFIED BUILDINGS | 2024



PLGBC
Polish Green Building Council



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This analysis was prepared based on information contained in the database of certified buildings maintained by PLGBC at <https://baza.plgbc.org.pl/>. The database provides useful information on each of the buildings included and can be filtered in several ways. This year's edition of the report includes a modified calculation methodology, so some of the values presented may not be comparable to data published in previous reports. This is due to the dynamics of development and the fact that individual buildings are certified under different systems and certification schemes.

The construction industry was significantly affected by the economic crisis, which was triggered by a wave of unpredictable events - the COVID-19 pandemic and immediately after it, the outbreak of war in Ukraine. A significant increase in the price of fossil fuels, as well as the low availability of materials, pulled a number of factors, the effects of which were evident last year.

As the data in this report shows, the economic downturn also significantly affected the market for multi-criteria certification present in Poland.

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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:

- activities related to climate change mitigation and adaptation,
- 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 over 80 green building councils within the World Green Building Council.

plgbc.org.pl

SUMMARY OF THE PERIOD MARCH 2023 - MARCH 2024

The cooling of the construction market is noticeable in almost all sectors, which is directly reflected in the certification market in Poland. In the previously analyzed period, certified space increased by more than 7.7 million m², and now by only 2.1 million m². In contrast to the previous year, a larger number of buildings were certified. Thus, one can see a general trend of certifying buildings with much smaller floor area.

During the period under review, there was a significant increase in the number of certified buildings in the residential sector, which amounts to 61% compared to the previous year. A total of 105 new homes were certified, of which more than 60% were certified under the ZIELONY DOM system.

In addition, in the period March 2023 - March 2024:

- 70 WELL Health & Safety ratings, valid until 2023, were not renewed.
- One DGNB Buildings In-Use certification was not renewed, and at the same time a certification under this system was granted for another building, so the number of these ratings has not changed over the past year.
- As many as 68 buildings (covered by two pre-certifications) came under the ZIELONY DOM certification.
- In addition to the WELL Equity rating, the CMS office in Varso Tower also received a WELL certification (full version, not for interior or Core & Shell) with a Platinum rating.



MARCIN GAWROŃSKI
 Dyrektor Działu Budownictwa
 Ekologicznego
 Sweco Polska
 President of PLGBC

We have been seeing an increase in interest in certification for years, and this trend will probably continue. In addition to previous drivers such as expectations of investment funds or tenants, good sustainable design or at least marketing aspects, we get further arguments. Building appraisal systems are excellent tools for implementing ESG strategies and raising financing. They contain numerous elements that can, with a little transformation, be translated, for example, into the criteria contained in the ESRS standard or the EU Taxonomy. They also provide a solid basis for calculating embodied and operational carbon footprint (which are the foundations of decarbonization), as well as aspects related to circularity and biodiversity.

We hope that legislative (e.g. circular economy) and transformational (primarily energy) changes will come out to meet the expectations and actions of the construction sector, which will help more radically accelerate the decarbonization of Polish buildings.



ANNA BĄK
 Sustainability Team Leader
 Arup

Increased environmental awareness among investors and the introduction of the ESG reporting requirement have increased demand for properties that meet certification criteria. There has been a notable rise in the interest in properties that have been certified in multiple systems simultaneously, such as LEED and WELL. Obtaining environmental certification for a facility provides concrete evidence of meeting certain sustainable building standards. Certifications can also positively influence the ESG perception of real estate portfolios, especially in light of the premium given to portfolios with certified properties by rating systems such as GRESB.

In addition to environmental and ESG certifications, the EU Taxonomy is becoming an increasingly important tool in assessing the sustainability of investments. The USGBC and BRE have developed documents that demonstrate the extent to which LEED and BREEAM support compliance with the EU Taxonomy. In practice, this means that certified facilities can be attractive investments from the perspective of sustainability and meeting the criteria of the EU Taxonomy.

GENERAL DATA

FLOOR AREA

The slowdown can also be seen in the sustainable construction industry. As of March 2024, certified floor area stood at nearly 38.6 million m² (Figure 1). Compared to last year, slightly more than 2.1 million m² of certified space was added, which translates into a 6% annual increase and also represents the smallest observed in the unveiling of the report of sustainable certified buildings (2023 saw an increase of as much as 27%).

The unmatched leader is the BREEAM system, which now accounts for 86% of total certified floor area. This year, this number increased by nearly 6% year over year. In contrast, the largest annual increase in certified space was recorded in the ZIELONY DOM system, at more than 50%. Current analysis also showed an increase of more than a third of the area in the WELL system.

However, a worrying situation occurred in the DGNB system, in which the area decreased by 7% due to the expiration of one certificate, which had not been renewed by the time of this analysis.

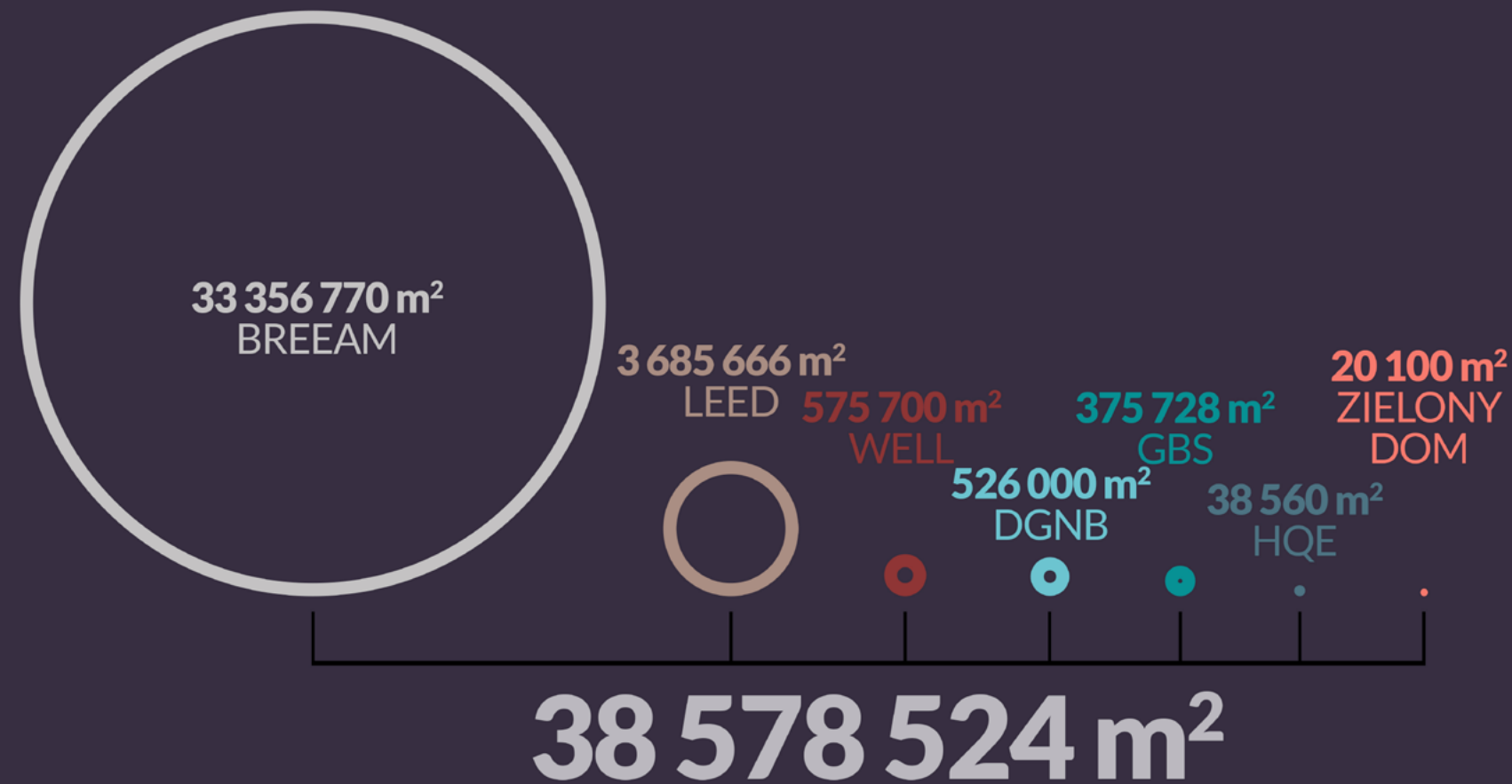


FIGURE 1 Usable floor area of certified buildings



ANNA JARZĘBOWSKA
Associate Director,
ESG Consulting
CBRE

Every year, CBRE conducts studies to assess the impact of ESG on the value of real estate and the profitability of green certificates. The results of these analyses, presented in the report *Strengthening Value Through ESG* (April 2023), confirm that the importance of certification is growing every year, and that buildings that do not undergo a multi-criteria sustainability assessment will lose value.

40% of tenants say they are willing to pay more for space in certified buildings, while 18.2% seek a reduction in lease rates if the building is not certified. In contrast, 20% say they would reject the option of a building without certification at all. Investors — given their ESG goals and the desire to “green” their portfolios — are even more constrained: 47.1% say they will consider a higher price if the property is green certified. 28.2% will seek a lower transaction value if the building is not certified. 14.1% of investors, on the other hand, are not willing to invest in non-certified buildings at all.

Findings presented in the report *Is Sustainability Certification in Real Estate Worth it?* (November 2023) instead confirms a significant correlation between sustainability certifications and the market value of buildings.

BUILDINGS

There are currently 2035 certified buildings in Poland (Figure 2). In contrast to the floor area, there has been a significant increase of 24% in the number of buildings (Figure 3), which translates into almost 400 new buildings. This is the largest observed increase in four years. Considering the increase in certified area, there is an obvious conclusion that mainly buildings smaller in size were certified in the current period.

This is also confirmed by the largest increase in the number of residential buildings, which has been recorded mainly in the ZIELONY DOM system. At present, its stock stands at 95 houses, making ZIELONY DOM already the third-largest system in Poland in terms of the number of buildings.

The above figure counts buildings certified with one or more certificates under a specific system. Buildings under design and construction were included, as well as existing buildings prior to certification. In addition, pre-certified buildings (LEED, WELL and ZIELONY DOM) were also considered, while buildings that are only registered in any of the systems were excluded.

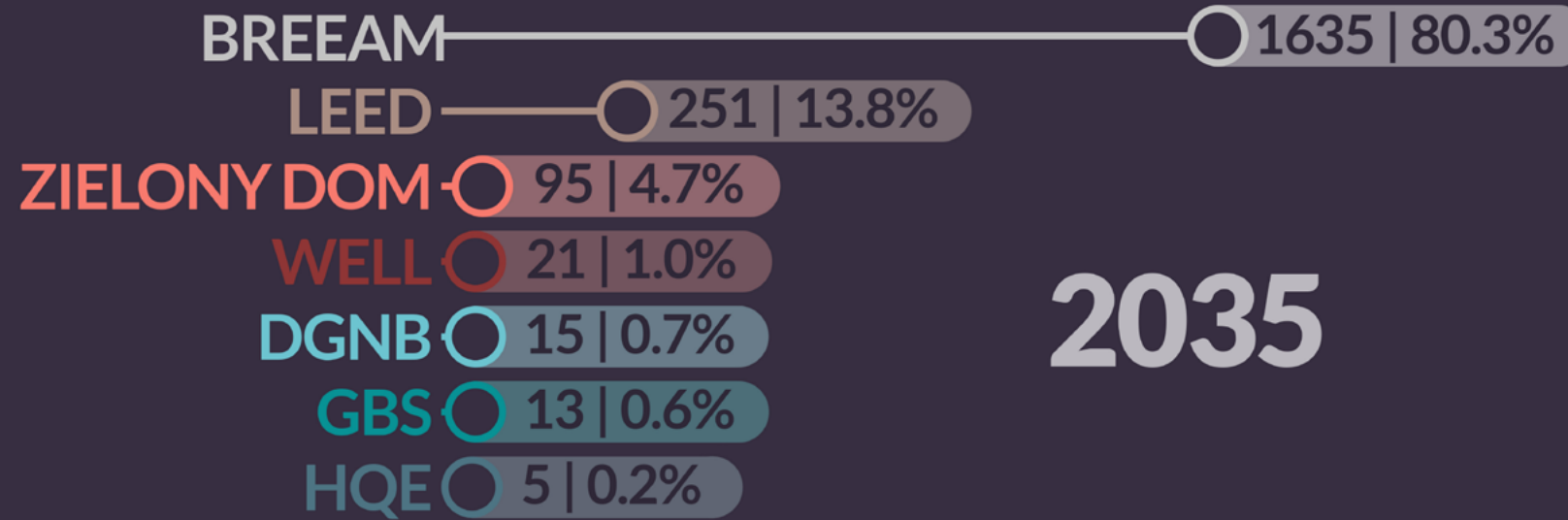


FIGURE 2 Number of certified buildings



FIGURE 3 Increase in the number of buildings



AGNIESZKA RYLSKA
Board Member, Senior Project Manager & Head of Sustainability Department
Go4Energy

The past year, in light of ESG being conjugated by all cases, has shown in an excellent way how thinking about sustainability from the foundation (i.e. concept and design), especially in the context of construction, is important.

Investors and developers who have been following a conscious path for years in the context of creating their investments in a sustainable manner do not have to face rapid changes in their investment portfolios to meet ESG criteria. Standards such as LEED, WELL, BREEAM, DGNB, GBS or ZIELONY DOM indicate a path for a sustainable and responsible not only the future, but already the present of construction, which in many aspects is in line with current trends regarding ESG in the broadest sense. As a result, both investors, tenants and later building owners can boast of owning or using a space that fits into current sustainability trends and apply for preferential financing terms.

I think an excellent summary of the past year would be to say that ESG in the construction industry, realized, among other things, through sustainable certification, can certainly not be treated only as a reason for the increase in the cost of investment, but above all as a lever for the profitability of investments and companies.

ANALYSIS OF THE SYSTEMS

BREEAM

BREEAM continues to be one of the most rapidly developing systems in Poland, and at the same time one of the most complicated. It happens that one building is covered by three different certifications - BREEAM New Construction, In-Use Part 1 and In-Use Part 2. The system also allows certification of a specific space that may be in a previously certified building. Given this intricacy, the following figures 4A and 4B show the exact breakdown of buildings and floor area certified under BREEAM.

BREEAM - FLOOR AREA

More than 33.3 million m² of building space is currently certified under BREEAM, while of this value, nearly 1.3 million m² is covered by several certificates. The actual usable floor area certified under this system is thus just over 32 million m² (Figure 4A).

Certified portions of buildings are also included in this figure.

Similarly to the floor area, 1,683 buildings are currently certified under BREEAM, while 48 of them have multiple certifications. Therefore, 1,635 buildings are actually covered by this system (Figure 4B).

This summary does not include buildings where only parts of the total building floor area are certified.

certified BREEAM space

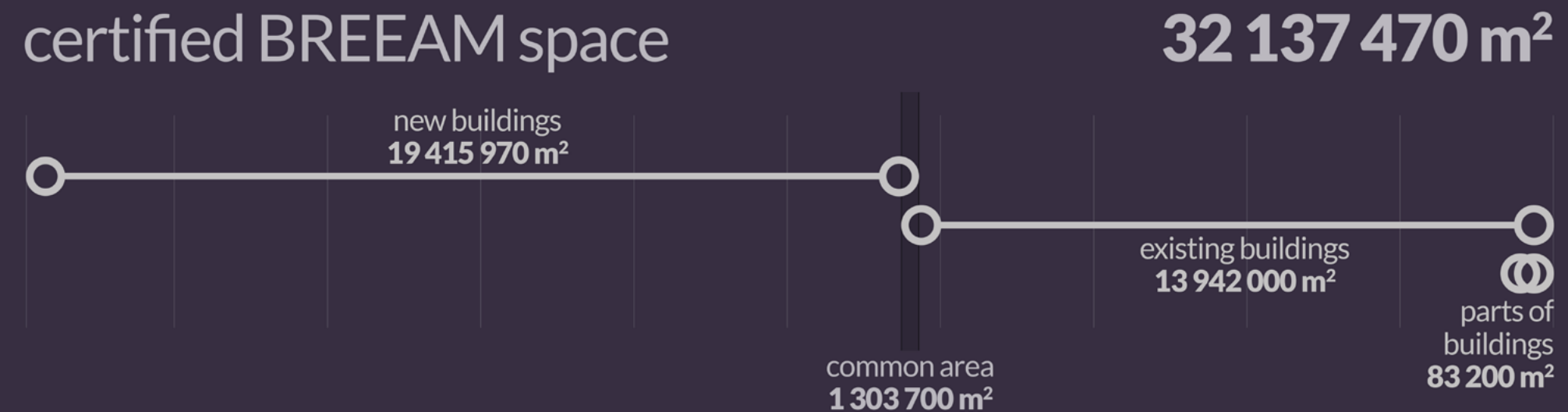


FIGURE 4A BREEAM certified usable floor area

certified BREEAM buildings

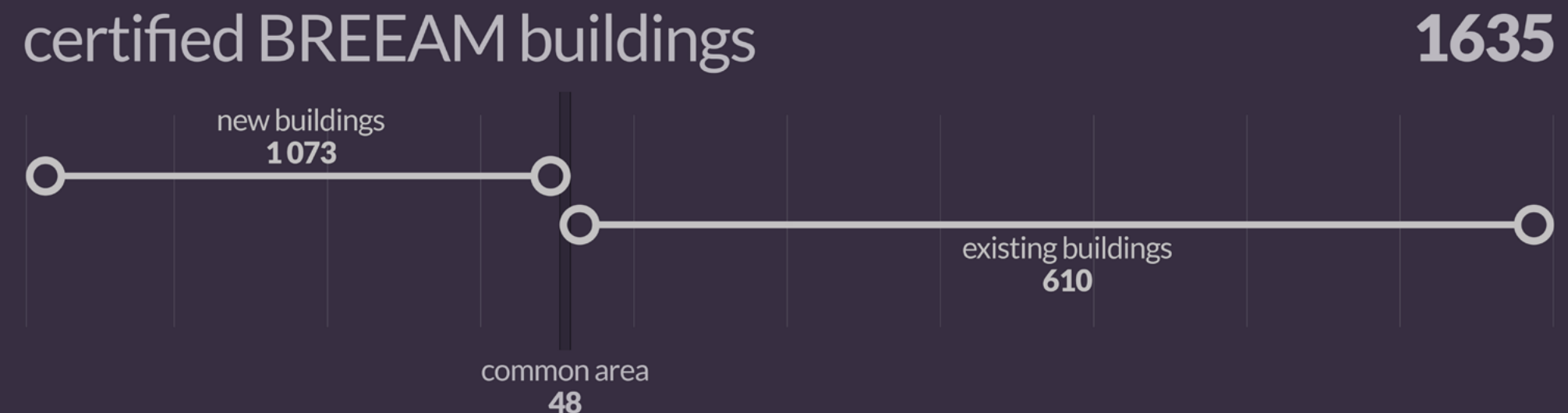


FIGURE 4B Number of certified buildings in BREEAM

BREEAM - CERTIFICATES

To date, BREEAM has seen annual growth in the number of certificates, with an average rate of around 25% per year. In contrast, there are now nearly 210 new certificates (Figure 4C), which translates into an annual increase of 14% (over 270 certificates were added in the last period). Thus, one can see a significant decrease in the number of new certificates in this system.

Considering the different types of certificates, the least number of In-Use certificates has been issued, less than 30, compared to almost 130 in the previous period. For the other types of certificates, the average annual rate of increase in their number is almost constant.

BREEAM certification ratings have remained very high for many years, with half of the buildings rated Very Good and one-third Excellent (Figure 4D).

ANALYSIS OF THE SYSTEMS

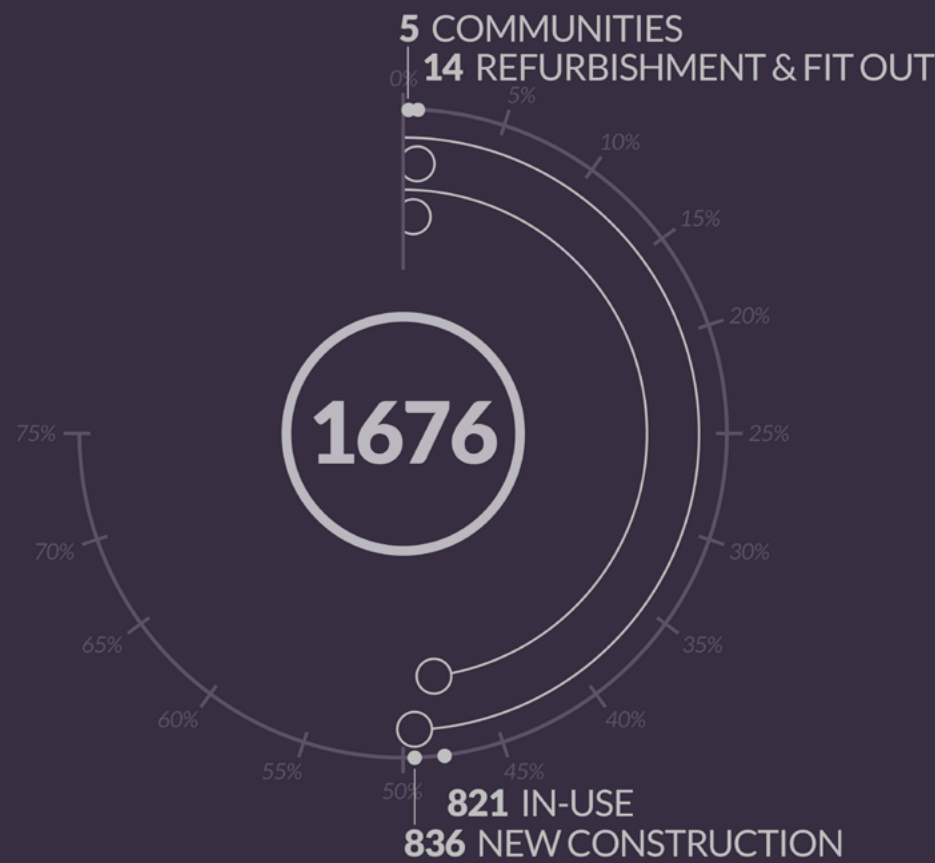


FIGURE 4C BREEAM certified buildings



FIGURE 4D Summary of BREEAM awarded grades



MICHAŁ LITEWNICKI
Sustainability & Innovations
Manager
CPI Property Group
PLGBC Board Member

The report's data shows that 30% of existing certified buildings are currently certified under the BREEAM In-Use or LEED Operations and Maintenance (O+M) systems. Such a high score is the result of, among other things, owner companies implementing ESG strategies. CPI Property Group also aims to increase the – now quite high – number of certified buildings in the group's portfolio. Our projects went through the certification process 10 years ago and still maintain high standards of sustainable operation. These types of buildings can be adapted much more easily and cheaply to the increasingly new green requirements.

Certification is also becoming an important condition for cooperation with financial institutions. Green lending or SLL loans are only available to entities that take real and quantifiable steps to minimize the environmental impact of their portfolio.

In our experience, proper building management based on ESG determinants and specific green solutions implemented in projects significantly affects the quality of the portfolio, its value, as well as its attractiveness according to tenants.

LEED

In the LEED system, the situation has improved significantly. In the previous analysis period, there were only 10 new certificates, while now there are as many as 21, and this represents the average increase observed between 2018 and 2021. Currently, 267 certificates have been issued in the LEED system. (Figure 5A). Existing Buildings & Recertification accounts for more than half of the new certifications, while a significant year-on-year decline in new Core & Shell certifications can be seen, with only three new certifications now arriving (Figure 5A).

In LEED, ratings are also at a very high, consistent level. More than half with a Gold rating, while nearly 40% with the highest Platinum rating (Figure 5B).

WELL

During the period under review, there were 7 new WELL certifications and the number of certifications now stands at 23 - the largest increase in the last three years in this system.

This compilation does not include the WELL Health&Safety assessment standard, which saw a massive decrease this year - the number of Health&Safety assessments decreased by more than half. This is due to the non-renewal of these assessments, most of which were produced as a result of the COVID-19 pandemic (Figure 6).

OTHER SYSTEMS

Other multi-criteria certification systems present in Poland should also be considered. In the current period, no new certification was recorded in the GBS system and HQE, which saw a freeze in 2018. In the DGNB system, admittedly, a new certificate appeared, while also one expired, so their number remains unchanged. The current period also saw the arrival of two new pre-certificates in the ZIELONY DOM system covering nearly 70 buildings.

ANALYSIS OF THE SYSTEMS

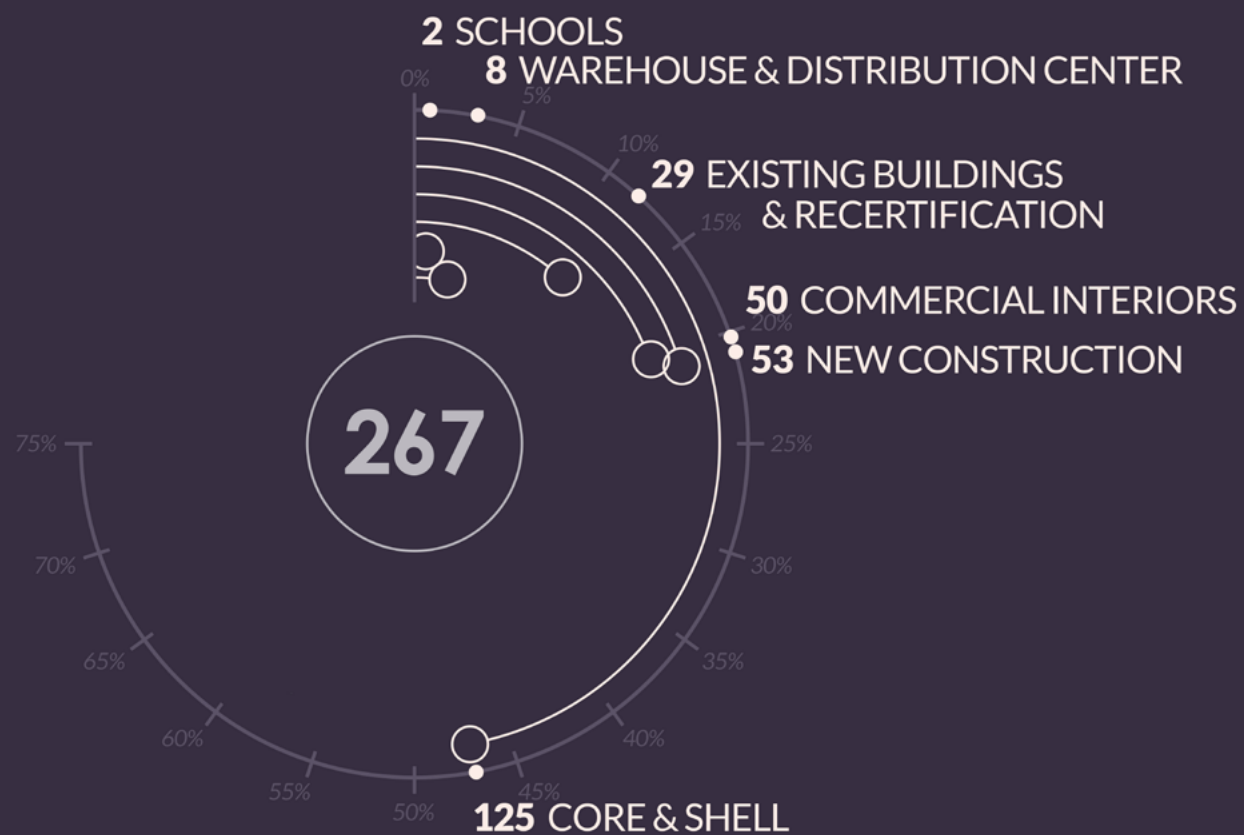


FIGURE 5A LEED certified buildings

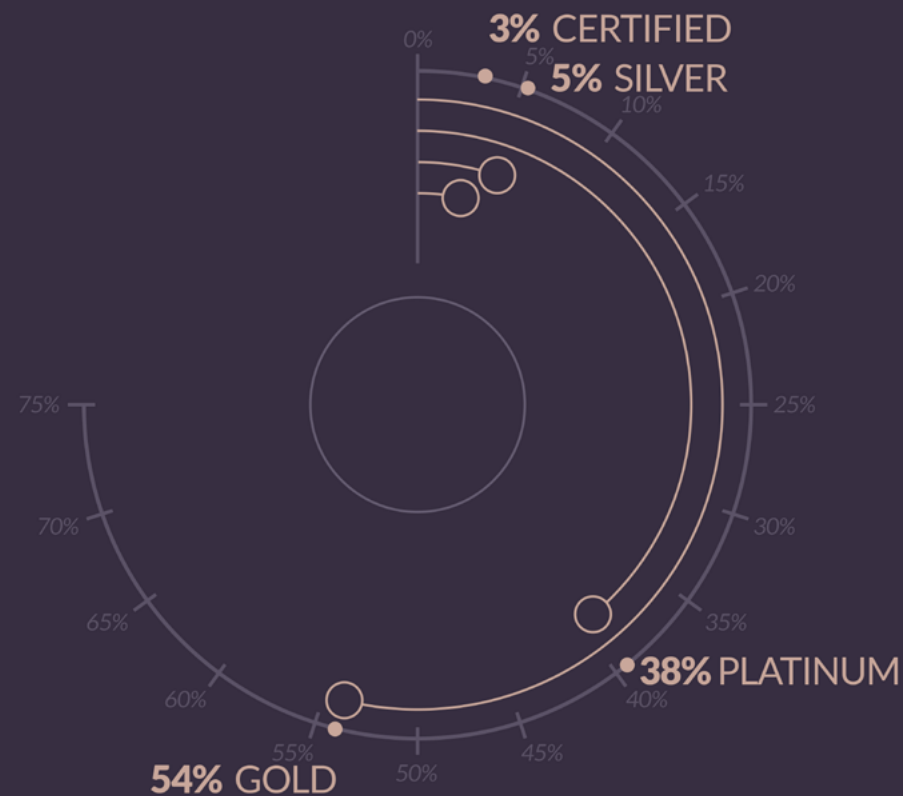


FIGURE 5B Summary of LEED awarded grades

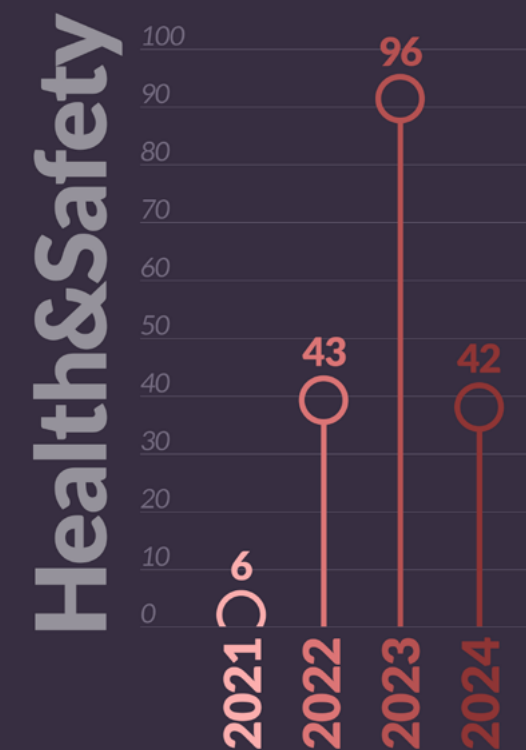


FIGURE 6 WELL Health&Safety

CERTIFIED NEW AND EXISTING BUILDINGS

This breakdown distinguishes between newly constructed buildings and existing buildings. Newly constructed buildings are facilities that have been certified before being put into use. Existing buildings, on the other hand, represent facilities that have been certified while in use. Due to the complexity of some of the systems, this summary includes 48 buildings that have been certified as both new and existing facilities. The total number of buildings and the total area will therefore differ from those presented in Figure 1 and 2.

FLOOR AREA

As of March 2024, more than 38.5 million m² were certified, 86% of which under the BREEAM system. During the period under review, there was a significant slowdown in the growth rate of certified usable floor area, which now stands at 6% per year (in previous periods the average rate was around 25%). The biggest slowdown was observed in the BREEAM system with a decrease from 30% per year to 6%. Moreover, in the DGNB system, certified floor area decreased by 7% compared to the previous period. The exceptions are the ZIELONY DOM and WELL systems, where the annual increase in certified floor area was 51% and 33%, respectively.

Currently, the certified area of newly constructed buildings is more than 60% of

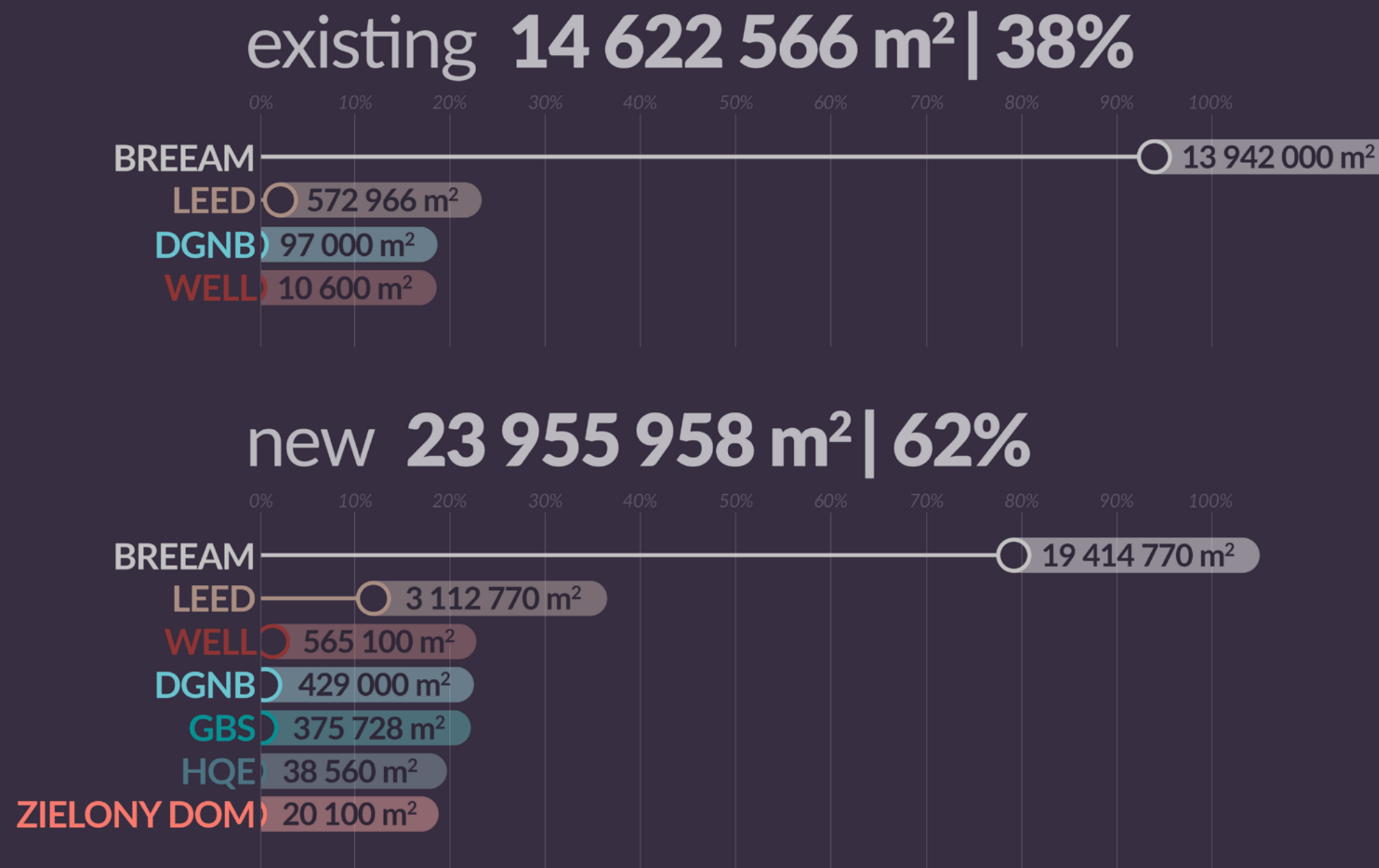


FIGURE 7 The usable floor area of newly constructed and existing certified facilities

total certified floor area, while the remainder is the area already certified at the time of the building's existence (Figure 7). Regarding the previous period, one can see a slowdown in the growth of the area of newly constructed buildings in favor of existing buildings.

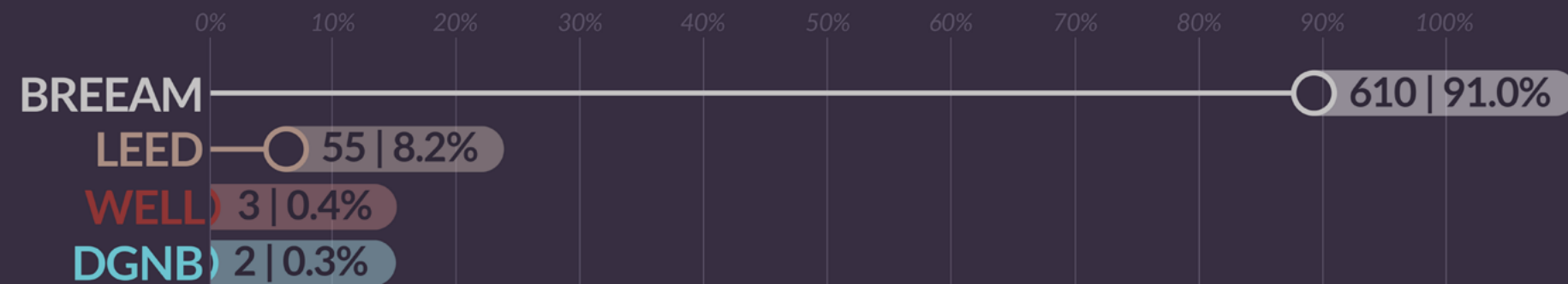
BUILDINGS

In this year's analysis, there was a significant increase in the number of certified buildings amounting to almost 450 units. Comparing this figure to new certified space, one can conclude that smaller buildings are now being certified. Due to the BREEAM system, in which nearly 50 buildings were certified as both newly constructed and existing buildings, the number of certified buildings in this compilation will differ by this value. The discrepancy from the previously presented number of new buildings is due to the methodology of this compilation, i.e. distinguishing between newly constructed and existing buildings.

Certified newly constructed buildings already account for nearly 70% of all certified buildings. There is currently a significant annual increase in the number of these buildings, which is 34% per year, i.e. 361 new buildings. More than 75% of newly constructed buildings are already certified under the BREEAM system. An interesting case is the ZIELONY DOM system, which, despite its debut in 2022, already covers almost 7% of this set (Figure 8).

The annual growth in certification of existing buildings remains at a similar level as in the previous period analyzed, and is now just over 14%. In this case, invariably almost all existing buildings are subject to the BREEAM system.

existing 670 | 32%



new 1413 | 68%

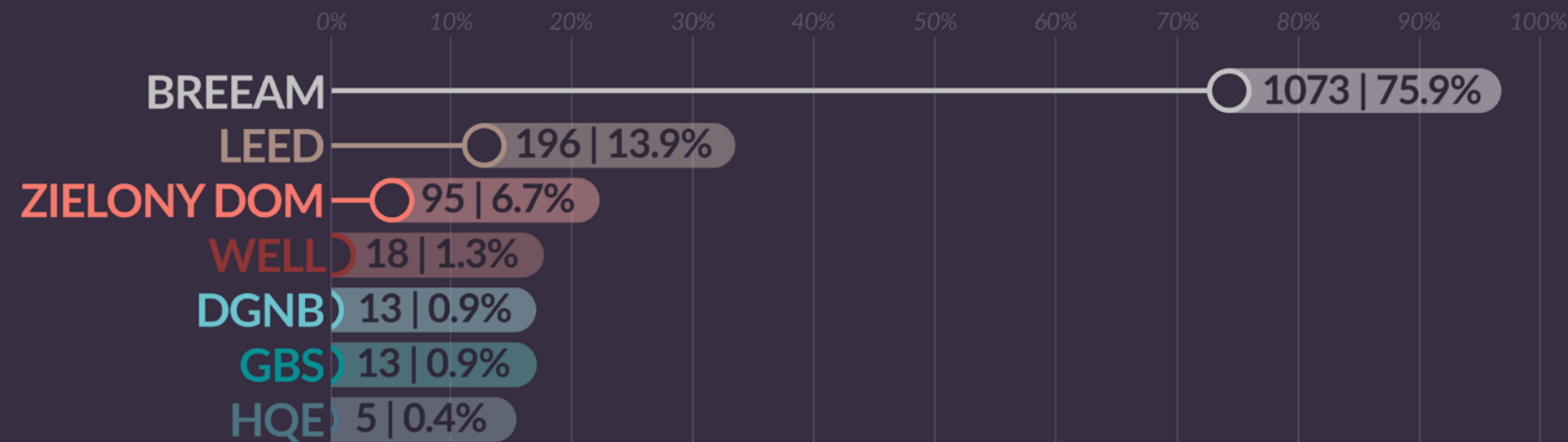


FIGURE 8 Newly constructed and existing certified buildings

BREAKDOWN OF CERTIFIED BUILDINGS BY SECTOR

FLOOR AREA

In March of last year, certified floor area in warehouse and industrial facilities overtook office space, which has been the leader for many years. This trend continues, with certified warehouse and industrial building space approaching to take up half of the total certified space (Figure 9).

BUILDINGS

As in previous years, the BREEAM system accounts for a large majority in almost all industries (Figure 10). The exception is the hotel industry, which is far more likely to certify buildings under the LEED system. It can also be observed that the share of the ZIELONY DOM system is starting to grow strongly in the residential construction industry.

The largest increase in certified buildings was in the warehouse and industrial sector (i.e. 209 facilities) (Figure 11). There was also an increase of more than 120 certified office buildings, the vast majority under the BREEAM system. Significant growth also occurred in the residential sector, which recorded 105 new homes, most of them under the ZIELONY DOM system. It is worth noting that the ZIELONY DOM system is dedicated exclusively to residential construction.

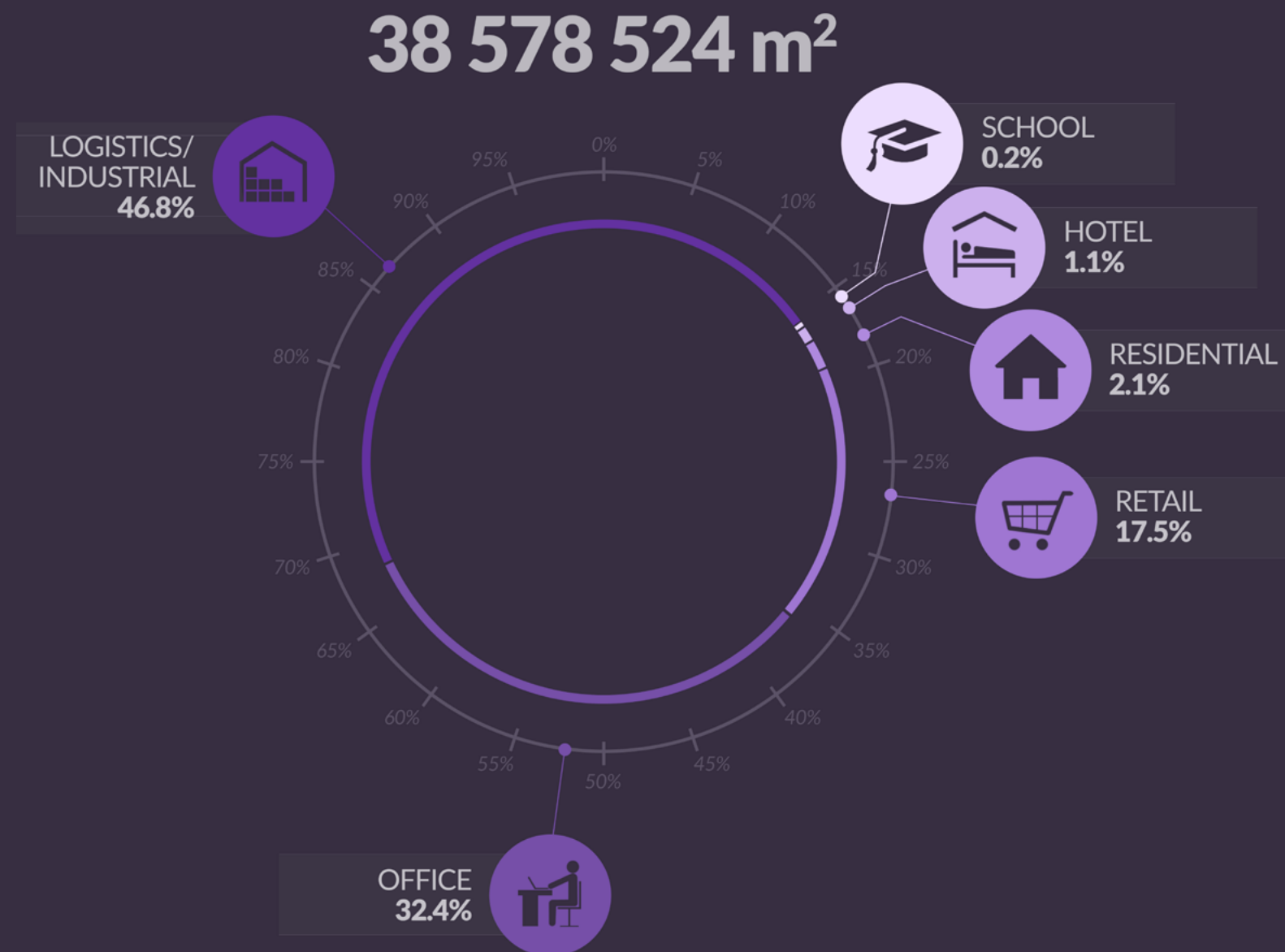


FIGURE 9 The usable floor area of certified buildings by sector



MARCIN CZERNIEWSKI
Development Manager
Prologis Poland Management

Analyzing the market of warehouse space developers, one can say with full force that BREEAM certification has become a standard. This is great news — for our customers, their employees, investors, and the planet. Customers get a clear indication of how sustainable a facility is designed and built. Employees are bundled with a place that is friendly to work and live in, and the planet gets a property that fits in with the mission to move toward zero-carbon. We regard the ten BREEAM categories as a good agenda for discussions with the client and potential user already at the planning stage of the investment. Today, it is impossible to implement ESG activities in our industry without proper environmental certifications.

At Prologis, we have been reporting our ESG activities in this dimension for 17 years, so we started well before it became fashionable. One of the many tools we were the first in the market to implement is an environmental management technique called life cycle assessment (LCA), which is part of MAT 01 Life Cycle Impacts in BREEAM.

BREAKDOWN OF CERTIFIED BUILDINGS BY SECTOR

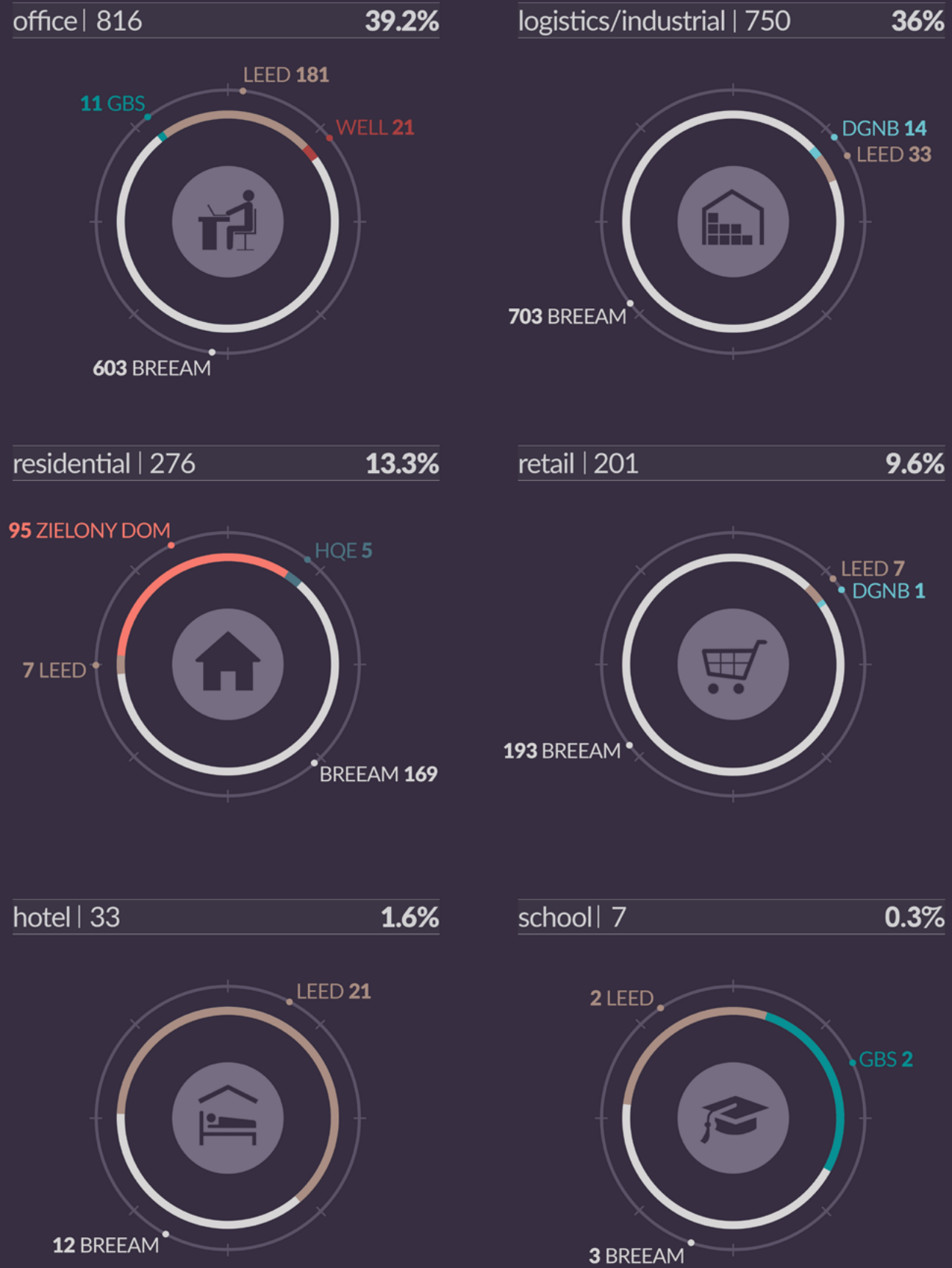


FIGURE 10 Breakdown of certified buildings by sector

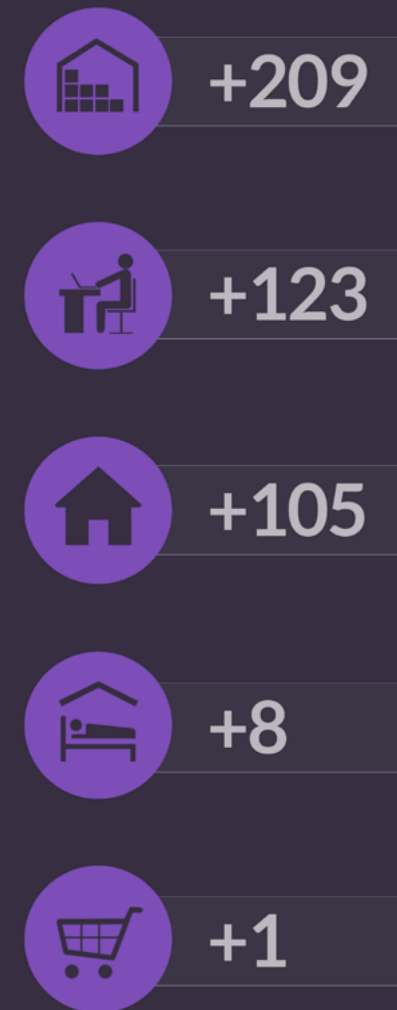
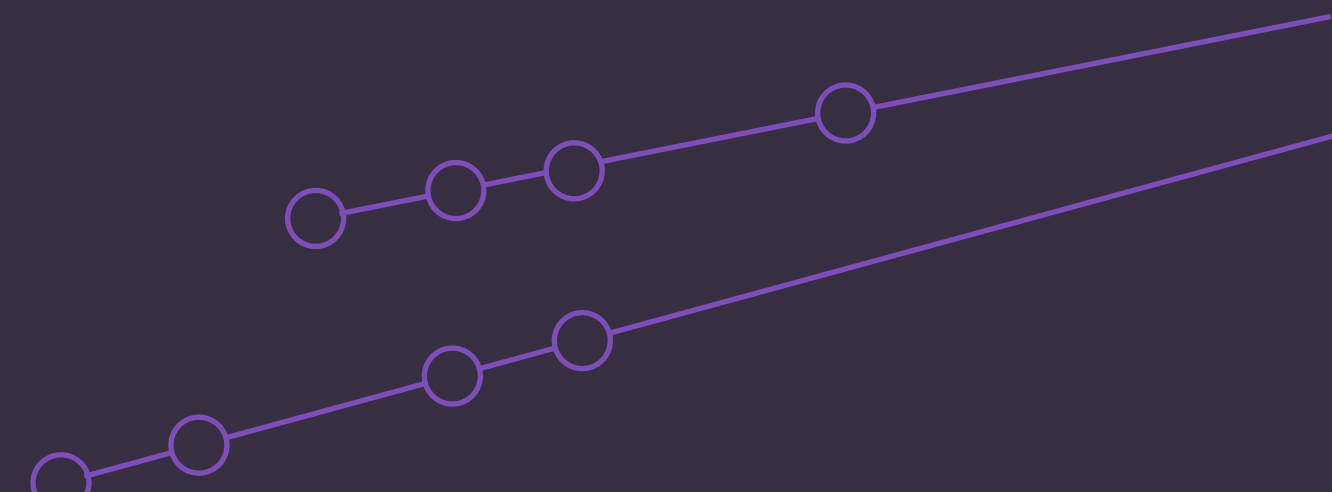


FIGURE 11 Increase in number of buildings by sector

ALEKSANDRA DUBRAWSKA
 Director of Property Management
 Nhood Services Poland

When managing commercial facilities, we apply for international certificates confirming the effectiveness of services provided to property owners. In the case of shopping centers and malls owned by Ceetrus Polska, we implement the certification process in the BREEAM standard, in which the areas of Asset Performance and Building Management are evaluated. Currently, 23 of the 24 facilities owned by Ceetrus Polska have BREEAM In-Use certification. These are mostly properties with a long history and an established position in the market. Therefore, obtaining the certificates confirms the enormity of the efforts made by the Nhood Services Poland team in transforming buildings into sustainable spaces that meet the stringent requirements of BREEAM certification.



Modern office space at the end of 2023 is just under 13.1 million m² ¹, of which more than 95% is already certified (Figure 12). Given the annual growth of this share, it can be expected that next year certified office floor area will be equivalent to modern office space in Poland.

Due to the expiration of some certificates, the total certified commercial space has decreased to 6.7 million m² (Figure 13). This figure represents half of the total modern retail space of 13.4 million m².

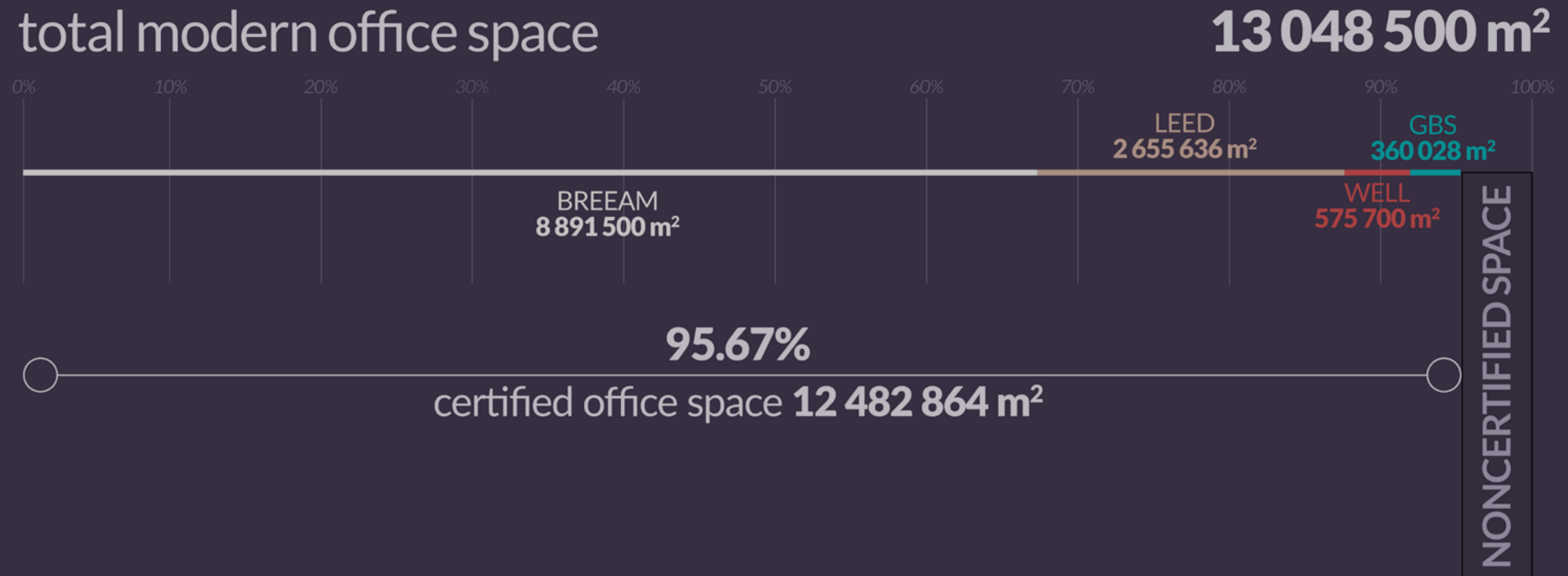


FIGURE 12 Share of certified office space in relation to total modern office space

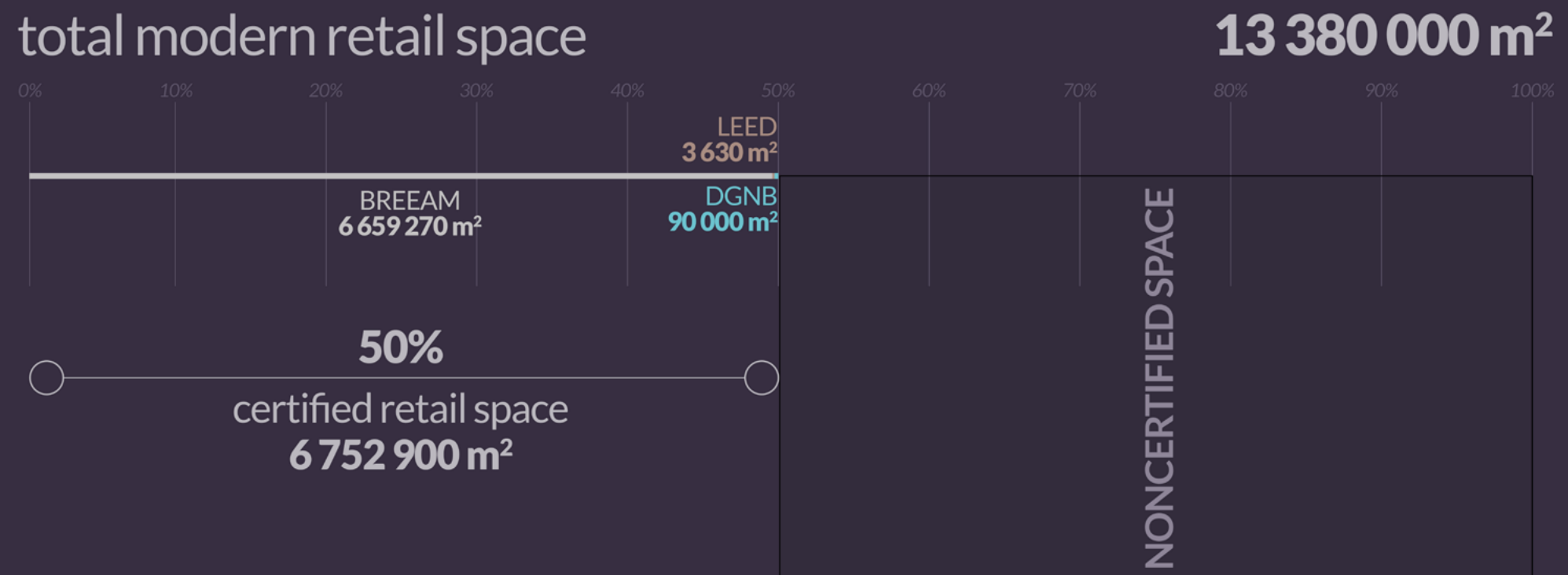


FIGURE 13 Share of certified office space in relation to total modern office space

¹ Marcin Kaczmarczyk, Wyraźne Spowolnienie, Forbes 3/2024

² 35 retail buildings have been built and 14 were renovated in 2023. Available online (20.03.2024 r.): <https://inwestycje.pl/nieruchomosci/35-obiektow-handlowych-wybudowano-a-kolejnych-14-zmodernizowano-w-2023/>

WAREHOUSES

The warehousing sector is one of the few to record increases in the floor space of its facilities. Compared to last year, it can be noted that total modern warehouse space has increased by more than 4.5 million m² and now stands at 32.8 million m²³.

The share of certified space to total modern warehousing space has remained almost constant and currently stands at 53% (Figure 14).

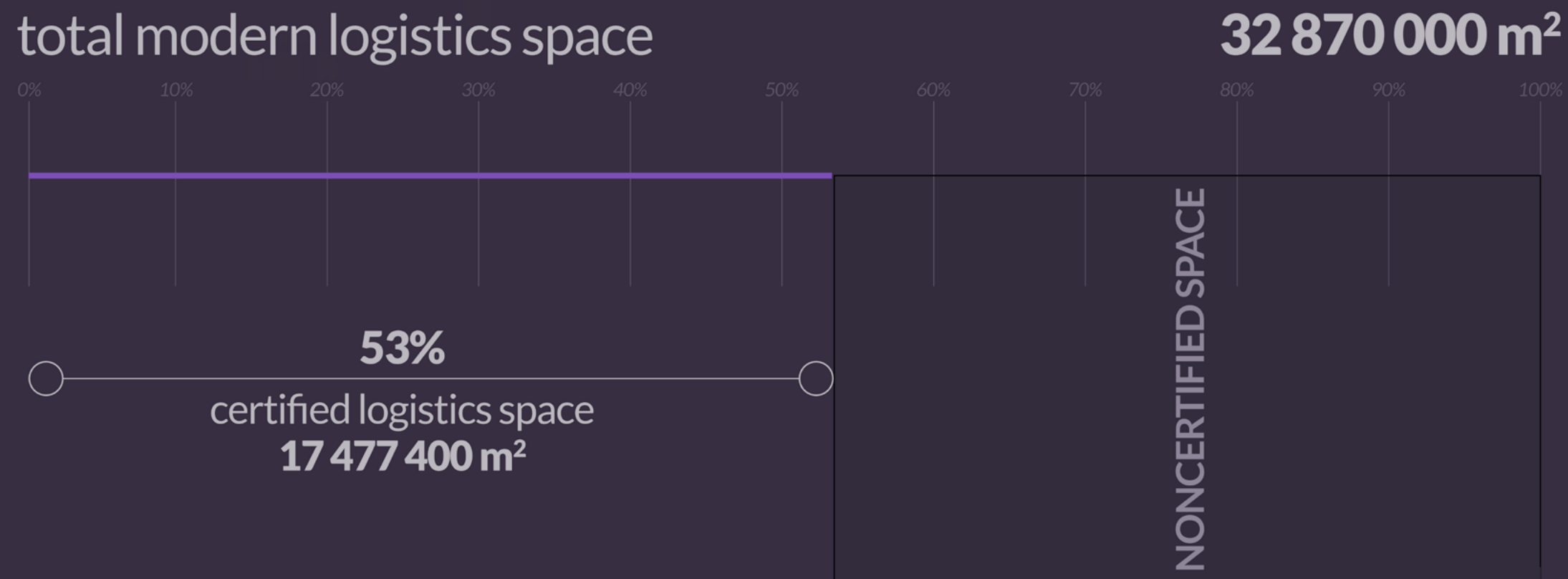


FIGURE 14 Share of certified logistics space in relation to modern logistics space

³ Rynek magazynowy w Polsce. Available online (20.03.2024 r.): <https://www.jll.pl/pl/trendy-i-analazy/badanie/rynek-magazynowy-w-polsce>



EMILIA DĘBOWSKA
 Head of Sustainability
 Panattoni
 PLGBC Board Member

The year 2023 marks another new stage in building certification, associated not only with intensification, but also with achieving the highest standards. Poland saw the first BREEAM Outstanding for an industrial facility, awarded to Panattoni Park Szczecin II. Immediately after, we obtained two more – for Konin and Robakowo. And finally, in 2023, Panattoni certified 2.5 million m² in the country, increasing the certified area to 9.5 million m².

We see that environmental certifications continue to be key for investors and banks; tenants are also asking for them. They provide measurable benefits in terms of energy and water savings, but also in terms of embodied footprint, provided appropriate performance indicators are set. They have now become a market requirement, along with the energy performance of buildings – their absence can reduce the value of an investment. But, in the context of current EU regulations and environmental targets, they are already insufficient. Therefore, we see these systems evolving to meet the new ESG guidelines, and we can expect to see an increase in certification criteria.

The period under review saw an increase of more than 1.7 million m² of new certified warehouse space. This represents an annual increase of 11%, and is slightly below the average annual growth observed in previous years (about 14% per year) (Figure 15).



FIGURE 15 Annual growth of certified warehouse space



JERZY WÓJCIK

Chief Executive Officer
JWA

Investors are prioritizing green building certification, but first those that promise near-zero net emissions, climate resilience and effective management of social issues, avoiding “pale green” buildings that only superficially address these issues. Preference is given to buildings that comply with decarbonization pathways from the beginning, eliminating the need for future capital expenditures.

Operational certifications like BREEAM In-Use and LEED O+M are highly valued because of the real connection between design intent and actual performance, and independent verification and validation as the only such tool in the real estate market.

While there is interest in thematic issues such as health, resilience and smart technology, investors are divided on thematic certifications and are looking for guidance on their interpretation.

This reflects the complex landscape of the real estate market, which requires true sustainability practices aligned with long-term decarbonization goals.



MAGDALENA ZIELIŃSKA

ESG Advisor, CEO
Midori Project

We have noticed a greater awareness among developers to build a coherent sustainable construction strategy. One of the key aspects of the certification of modern warehouses is energy efficiency, and investors are increasingly thinking about energy-efficient technologies and strategies to minimize energy consumption and greenhouse gas emissions, which makes us thrilled.

There is a growing emphasis on integrating sustainability principles, both in the design and construction stages, as well as in the operation of warehouses.

In the coming years, with the EU Taxonomy and requirements of financing institutions, emissions reporting will become significant, and it is important to prepare for this wisely. It would also be worthwhile to pay attention to introducing traceless stormwater management, as well as reducing the environmental footprint of storage investments and promoting the circular economy.

RESIDENTIAL BUILDINGS

The growth of residential certification was already observed last year, and the current analysis strongly suggests that the growth is even more intense. Nearly 280 homes are already certified in this year's list, an annual increase of more than 60% (Figure 16). The highest number of new buildings was recorded under the ZIELONY DOM system, with 68 homes, followed by BREEAM, with 36 homes, and one under the LEED system.

THE ZIELONY DOM CERTIFICATE

The ZIELONY DOM Certificate is the first Polish multi-criteria system assessing residential investments in terms of sustainable construction. It is primarily aimed at the real estate development sector. The certificate can cover multifamily buildings, single-family homes, and rental residential buildings. The ZIELONY DOM Certificate is a document confirming that the building meets specified criteria regarding energy efficiency, sustainable use of natural resources, and minimization of negative environmental impact. It serves as recognition for buildings designed and constructed with a focus on environmental protection and the conservation of natural resources, all while ensuring user comfort.

The ZIELONY DOM Certificate can be awarded at three levels: Standard, Premium, and Prestige, depending on the degree of compliance with specified standards of sustainable construction. The process of obtaining this certificate may require conducting appropriate analyses for the building and meeting a range of criteria related to thermal insulation, energy consumption, use of renewable energy sources, indoor air quality, and many others.

Having the ZIELONY DOM Certificate is important for building owners both from an ecological and economic perspective, as it can contribute to reducing operating costs by reducing energy consumption and increase the attractiveness of properties in the market.

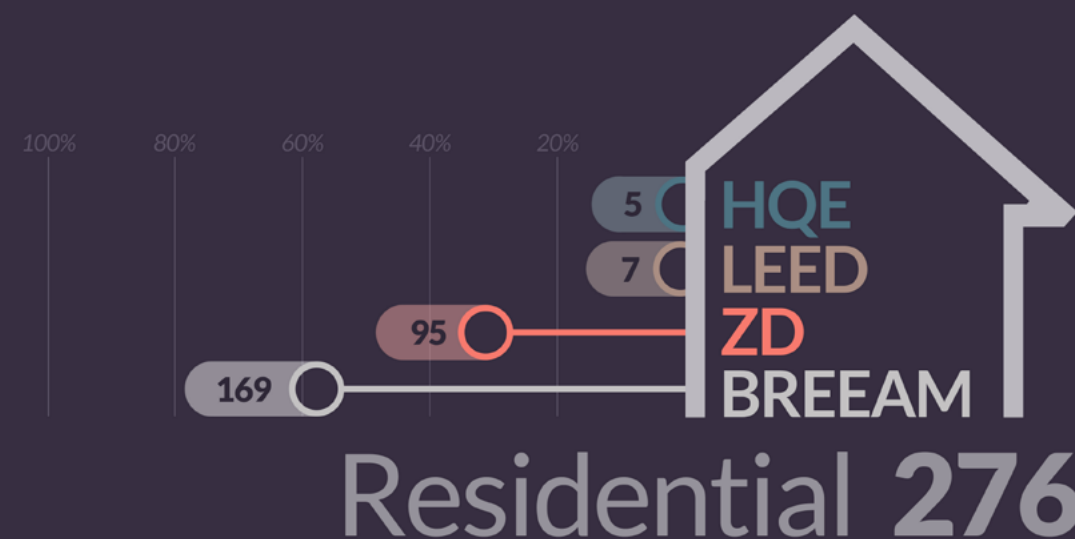


FIGURE 16 Number of certified residential buildings per certification scheme



DARIUSZ HUTA
Director of the Project
Management Office
Unidevelopment

From the perspective of companies developing residential projects, multi-criteria certification has several advantages. While meeting the requirements under systems such as BREEAM brings with it the need for developers to adapt their project processes and introduce new standards, it also allows them to prepare for the upcoming stringent environmental requirements. All of this is of great importance, combined with the fact that ambitious goals are being set for our sector in terms of reducing the negative impact of construction processes on the environment.

Objective assessment by external experts, awarded as part of multi-criteria certification, provides assurance that projects are prepared and implemented according to standards that allow them to be counted among sustainable investments. It also gives companies a potential advantage according to customers. In this context, it is important to raise awareness among those looking for housing. It is worthwhile for them to realize that by buying a unit in a certified building, they are making a responsible decision in terms of ecology, lower property maintenance expenses, as well as providing themselves and their loved ones with friendly living conditions.

ADMINISTRATIVE BREAKDOWN OF CERTIFIED BUILDINGS

The largest number of certified buildings is in the Mazowieckie Voivodeship, but a decline in this share has been observed for several years in favor of the other voivodeships - mainly Silesia and Małopolskie (Figure 17). In almost every province, the number of certified buildings is increasing, except Podlaskie and Opolskie, where stagnation has been observed for several years.

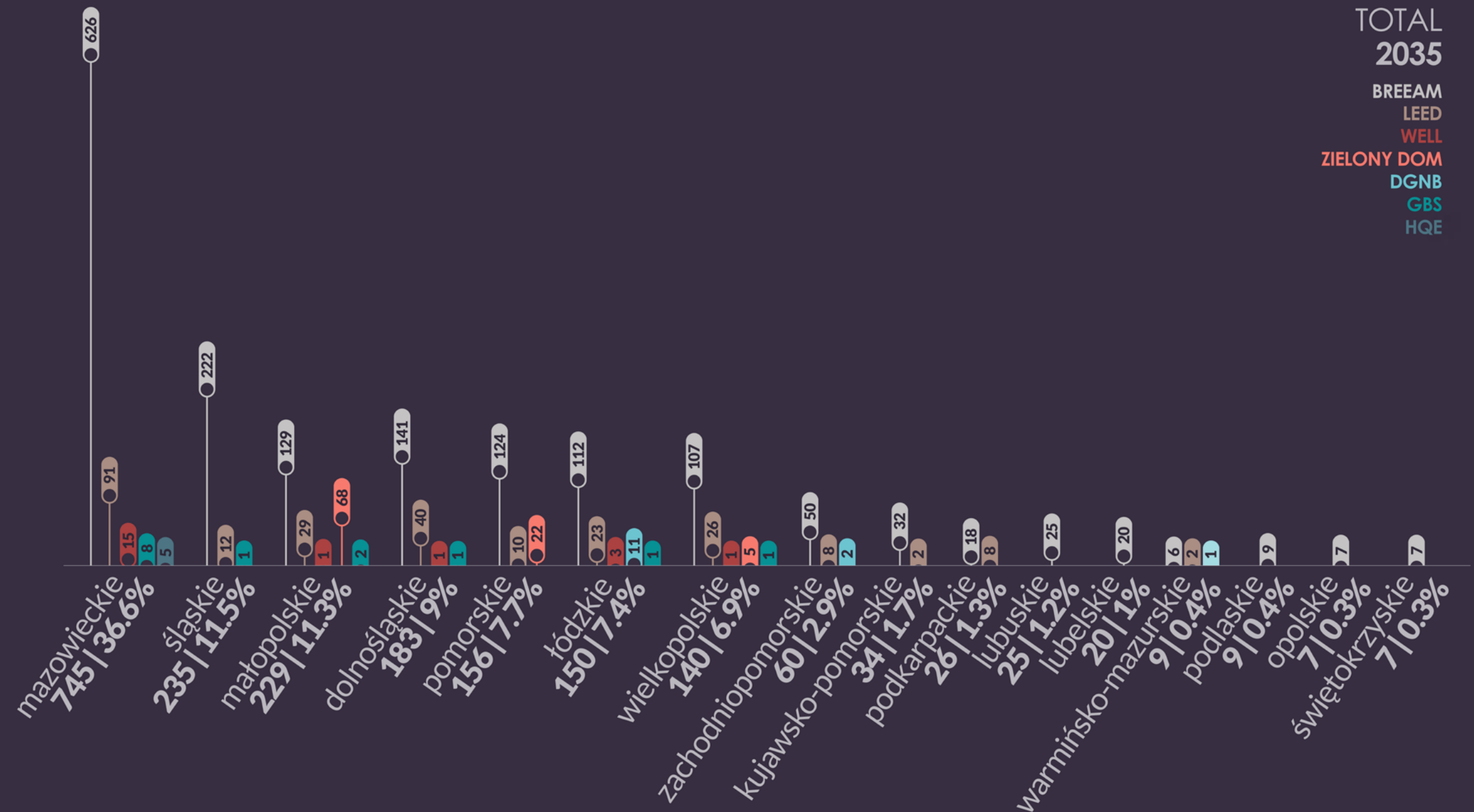


FIGURE 17 Certified buildings by location



PLGBC

Polish Green Building Council

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