BRC Project – Building Responsible Competitiveness
Grant Agreement N. SI2.ACGRACE020970800

Report Summary Phase 1

Project Leader

Partner in charge of the Phase

Other partners

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1. BRC - Building Responsible Competitiveness

The Project

In line with the objectives of DG Enterprise and Industry *Grant Workprogramme 2008 – ENT/CIP/08/E/N04S0000: fostering Corporate Social Responsibility in European industrial sectors*, the project "BRC Project – Building Responsible Competitiveness" aims to foster Corporate Social Responsibility (CSR) within a particularly sensitive field of activity, such as the construction sector, involving a large number of companies in the sector (from general contractors to medium and small enterprises that make up the supply chain) and some of the major stakeholders (associations, trade unions, universities).

Partners

The project is implemented through the involvement of a broad partnership made by experts (Nuova Quasco, Ancpl, IRES) and academic methodologists (University of Bologna, Faculty of Engineering and Management), as well as numerous non-profit organizations engaged in the promotion of CSR (Impronta Etica, Foretica, KOVET, RespAct, RSEPortugal, CSREurope).

Overall, the project involves five countries: Italy, Spain, Hungary, Austria, Portugal.

Within each country, each partner committed itself to build an informal network of stakeholders and companies to be periodically involved in the project.

In this regard, we would like to thank Impronta Etica's member companies - Coop Ansaloni, CCC - Consorzio Cooperative Costruzioni, Coop Costruzioni, that are part of the Italian Advisory Board of the project and, in particular, CMB - Cooperativa Muratori e Braccianti di Carpi, which contribution has been fundamental in order to test all the survey instruments used during the project.

Objectives

The overall aim of the project is to verify and to demonstrate that the adoption of socially responsible actions enhances the competitiveness of the business in the construction sector, in comparison with the adoption of social dumping behaviours, through:

1. the elaboration of a set of indicators able to correlate the economic-competitive performance with sector sustainability measures;

2. the analysis of the relationship between the social and economic value coming from the surrounding environment gained by the construction sector in order to perform and the value given back to the stakeholders at the end of the production cycle.

The achievement of this second objective will allow us to:

- understand which are the factors facilitating the creation and distribution of economic and social value and what are the factors hampering such process;
- support enterprises in implementing their improving strategies.

Dimensions considered

The project is framed in a highly complex context and it concerns a sector in which studies regarding CSR are still rare.

Therefore, having in mind the vastness of the object of analysis, both in terms of sectorial dynamics and in terms of social responsibility, we preferred to reduce the analysis to four areas, being aware of the fact that they are not and cannot be exhaustive:

- Health and safety
- Responsible management of the Supply Chain
- Eco-compatibility
- Equal opportunities

Expected Outputs

The main expected outputs from the project include:

- a set of indicators for regularly monitoring the link between CSR and competitiveness within the construction sector, with the aim of providing a useful tool to contribute to the elaboration of local policies for the sector and to periodically monitor their impacts. The set will be adequately tested during the project;
- Guidelines supporting construction companies in making corporate behaviour coherent with the desired outputs in terms of economic-competitive performance and of social and environmental sustainability.

2. PHASE 1: Context analysis

In the first phase of the project, already completed, an analysis of the construction sector within the countries considered has been developed in terms of:

a. economic trends, dynamics and market characteristics;

b. legislative context at the National and European levels;

c. state of arts of CSR within the sector.

The general objective of this phase, preparatory to the implementation of the activities planned in the next phase, was not to build a comprehensive and exhaustive picture of the sector in its single aspect, but rather to build a framework through which one could understand what is meant by the term "competitiveness" and "socially responsible behaviour" in the case of construction companies.

In this way, it was possible to reconstruct an homogenous framework and to distinguish between socially responsible behaviour and legislative compliance within the five countries involved in order to develop the outputs to be later used within the different countries.

2.1 Methodology

During the phase 1, the survey was realized through:

- Desk research and analysis;
- Realization of exhaustive interviews to actors operating in the sector belonging to different stakeholder categories (companies, business organisations, trade unions, research institutes, public authorities and contracting subjects), through the elaboration and experimentation of a specific questionnaire. The interviews reflected a qualitative point of view rather than quantitative, for a total of 38 interviews.

The realization of the questionnaire for interviews, elaborated by Nuova Quasco with the contribution of CMB – Cooperativa Muratori Braccianti di Carpi which helped to write its final version after different tests, deserves a particular explanation.

Through this questionnaire we asked to people interviewed:

- for each of the four BRC dimensions: to express a motivated opinion about their relevance within the sector; to signal the possible link of these areas with the competitive factors such as price, cost and reputational advantages within each of the three markets in which they operate (public procurement, private procurement, real estate promotion); to mention some good practices they are aware of;

- to indicate how the public authorities promote or could promote CSR among companies in the sector and to report any good practice;
- to report any good practices developed in collaboration with other stakeholders;
- to indicate any particular legislation reference directly related to one or more of the four CSR areas considered for the construction sector;
- to mention their personal perceptions and expectations (survey of "sentiment") with regard to a broader range of competitive advantages potentially occurring, considering a greater variety of CSR areas.

During the elaboration of the questionnaire, an effort was made to consider the work carried out on CSR by FIEC[1] and RIMAS[2], research institute supporting the EU Commission and different projects founded within the ENT/CIP/08/e/N04S00 action.

In this way, it has been possible to:

- reconstruct the main directions provided by the regulatory framework for each country (and, partly, also for the European context as a whole) with regard to the four CSR dimensions provided by the project (equal opportunities, supply chain, health and safety, eco - compatibility);
- reconstruct the main economic dynamics of the sector within each country. With this regard, we would like to underline that the beginning of the project coincided with the beginning of the economic crisis, which widely changed the reference framework, causing deep and important incertitude. For this reason, we decided to rely on an equally relaible source of information for each country: the EuroConstruct Annual Report;
- reconstruct the state of art of CSR in the construction sector within each country and to find out some CSR good practices developed by the companies of the sector for each dimension considered;
- to derive some particular indications with regard to the perception of the actors involved in the sector on the relationship between competitiveness and socially responsible behaviours of construction companies.

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[1] Fiec, *The Fiec Principles for Sustainability*, 2006

[2] Martinuzzi, A., Margula, S., *Responsabile Competitiveness. Exploring the link between Csr and competitiveness on a sector basis. Inception report*, Vienna, 2008

2.2 Main findings of the research

Here are the main findings of the research carried out. Being an abstract, all the details and the more technical aspects will be left out in order to provide the reader only with synthetic guidelines.

2.2.1 Economic situation of the construction sector in Europe

Before presenting the main findings of the interviews, it is necessary to briefly focus on the contemporary economic framework (with particular reference to the construction sector) in Europe, in general, and in the countries involved, in particular[3].

After a decline of 2.5% in 2008, another 4.3% fall is expected for the construction sector in 2009, and then a moderate growth (+0,4%) in 2010.

The 2008 negative trend is largely attributable to a sharp decline which occurred in the Spanish construction market (-13,4%), although the Irish market, which is however small, has recorded an even stronger fall (-20,6%).

The other major markets that recorded a production decrease in 2008 are France (-2,2%), Italy (-3,8%) and England (-1,1%), although the effects were partially mitigated by +3,1% registered in Germany. In the other parts of Western Europe, the growth has been weak and, overall, in this area, the production in the construction sector recorded a decrease of 2.9% in 2008.

On the contrary, the situation in Eastern Europe appears very different: in fact, the production in the construction sector grew 6.2% in 2008, despite a decline of 6.5% registered in Hungary. Poland registered the biggest increase in the production (+12.4%), followed by Slovakia (+6%) and the Czech Republic (+2.2%). Growth in the construction sector in Eastern Europe balanced the decrease occurred in the more "mature" markets.

2009 is expected to be another year of recession, with an overall decline of 4.3% in Europe as a whole. In Western Europe the decline is expected to be -4,8%: EuroConstruct sees again a drop more than 16% in Spain and Ireland. Of the other major markets, France is set for a -1,9% downturn, while German construction will fall just -0,5%. The falls in Italy (-5,0%) and the UK (-3,2%) will be more severe. In fact, the only markets expected to see rising construction output in 2009 are Portugal (+0,4%), Sweden (+0,2%) and Switzerland (+0,8%), while Austria is expected to be

[3] Euroconstruct Country Report "European Construction: Market trends to 2011", 2008

flat. In the Eastern Europe, growth will remain, but at +4,8%, namely well down compared to the rates of +8,8% and +8,0% seen in 2006 and 2007.
Looking ahead to 2010, EuroConstruct sees European construction output rising by +0,4%, with a marginal -0,1% decline in the West being offset by robust growth of +9,6% in the Eastern countries.
The recovery is expected to take place in 2011, with the Western markets growing +1,6% and Eastern Countries rising +10,9% for a +2,2% increase overall.
It is important to underline that within the BRC countries, there are different situations. While in Western Europe the decline is expected to be -4,8%, with Spain being hardest hit, Italy could be the economy nearest to the European media. Also Hungary has a negative situation, very far from Poland or Czech and Slovak Republics, but Austria and Portugal registered better market conditions.

SUMMARY	
Spain	Very strong crisis
Italy	Economic situation in the European average
Portugal	partial Recovery
Hungary	Important recession
Austria	Stationary after development

2.2.2 Health and Safety

The issue of Health and Safety is particularly relevant in the construction sector. The researches carried out by the partners showed that this area is one of the most exposed to real risks of accidents and injuries, mainly due to companies lack of attention to basic rules for safety in the building yard and lack of adequate training for workers. Additionally, due to the high exposure to accidents and injuries in the construction sector, preventive measures and regulations enacted by states represent a central aspect.
Within Europe, in most cases, large multinational construction companies do have some sort of health and safety policy, trainings or activities. However, it is important to underline that, in general, such initiatives are realized to ensure compliance with existing national or European legislation and they do not go beyond the law. In fact, they are mainly motivated by fear of sanctions or even criminal charges laid down by Community law in case of accidents or non-compliance with minimum criteria.

The stringent legal obligations required under the EU law (Council Directive 92/57/EEC of 24 June 1992) and under the different national laws represent a serious threat to profitability and thus, to the competitiveness of companies not taking proper measures to ensure their employees are well protected against these risks.
However, many companies, especially SMEs (which constitute 80% of the sector) still have difficulties in respecting the existing rules and regulations.
Although the situation of Health and Safety improved considerably in recent decades, deaths in construction sector represent an overwhelming 40% of work-related deaths.
Researches realized by BRC partners and the collection of good practices highlighted the shortage of cases in which companies implement policies and measures that go beyond the compliance with regulations. Furthermore, 99% of the 19 best practices identified are conceived, guided or implemented not directly by the companies but rather by public authorities, municipalities, or business associations and trade unions.
Thus, while larger companies tend to be the most scrupulous in observing the rules, there are many other small companies that often do not even meet the minimum standards required by law. Moreover, with regard to SMEs, controls are more difficult because they are very often part of a long and fractioned supply chain.
With particular reference to the partners' countries, the research shows that the last decade was characterized by a strong regulatory intervention by governments to curb the problem of accidents at work. In each country, the regulatory action was also addressed specifically to the construction sector generally and mainly through: the establishment of mechanisms and agencies aiming at enforcing controls in order to ensure safety on building yard; the appointment of internal managers; training and raising of awareness directed to workers and employers focusing on the importance of attention to safety in the workplace.
In particular, looking at each country, we could assume, for example, that in **Hungary** a very serious problem is the non-adherence on behalf of SMEs to the strict legislations regarding health and safety on building yards. In the case of SMEs, for example, the limited availability of human resources determines the allocation of more tasks to workers and the impossibility of appointing a specific person in charge for health and safety who could entirely focus on his duties as provided by law.
In **Austria**, a part from the regulatory aspect, the interventions are aimed at stimulating the delivering of workers' trainings with regard to behaviours, procedures and equipment needed to prevent accidents on building yard. A particular accent is

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stressed both on the importance of managers' participation and on the fact that these training activities should be specifically executed on building yards, in order to teach workers to deal with concrete situations.

In **Spain**, one of those EU countries with a higher frequency of accidents at work, state regulatory intervention on health and safety at work focused on alignment with the EU directives, in recent years, and the construction sector was affected by specific legislation. The regulatory action was also accompanied by an intense debate between trade unions and representatives of employers, whose results are however difficult to implement into practice.

In **Italy**, in the last years, the evolution of Italian legislative scenario on workers' health and safety brought to significant results - of which the most important was the drawing up of the "Law on health and safety" (Testo Unico su Salute e Sicurezza). In particular, it permitted the implementation of a diversified strategy according to the various contexts of risk, which results varied and coherent at the same time in approaching the problem. Recent regulatory actions provided many new duties aiming at improving the health of workers both indirectly, especially through the contrast of undeclared work, and directly, through the introduction of new protections and the increase of safeguards for those who suffer post-accident damages and for the families of the victims. With respect to the construction sector, the review of legislation on procurement is extremely topical: on one side, it provides measures to improve the efficiency of joint liability between the contractor and the contracting as well as the coordination of risk prevention interventions; on the other side, it tends to change the system of awarding public procurement to the largest discount in order to ensure that the allocation does not lead to decreased levels of health and safety of workers. The attention given to "health and safety at work" issue seems to be related in part to the size of companies operating on the building yard: the medium-large enterprises are in fact more likely to intervene on matters related to health and safety, because they are more vulnerable in terms of visibility.

Since the 90s, **Portugal** looked very careful in transposing EU directives on health and safety at work in general, but, in particular, with reference to the construction sector, thereby acknowledging the importance and necessity of stemming and reversing the high incidence of accidents and injuries in the sector.

2.2.3 Eco-compatibility

Sustainable development and environmental protection has become issues of utmost importance also for the construction sector, which faces the growing demand for eco-efficiency, low consumption and low environment impact buildings.

Over the last several years, construction companies (usually those of larger dimension) and their suppliers developed environmentally-friendly materials, products and management systems characterized by a low environmental impact.

Due to the increasing importance of climate change and environmental degradation issues, all national governments, following the interventions sponsored by the EU, developed regulatory guidelines for the reduction of CO2 emissions and pollution, which also affected the construction sector, strategic sector with high environmental impact. The European Commission's "Sustainable Energy Europe Campaign" estimates that buildings, whether domestic, industrial, commercial and administrative, account for almost 40 % of energy consumption in the EU. It is important to underline that the Commission is moving steps in partnership with the construction sector for reducing the overall energy consumption in EU buildings.

The relationship between construction activities and sustainable development is at the same time both significant and complex. The construction sector uses more raw materials than any other sector, and the process of constructing requires a huge consumption of natural resources. At the same time, there is also a pressing need for requalification of many European urban areas, in particular within the newly entered countries as well as for realization of major trans-European infrastructure works.

Among EU countries, we are witnessing an increasing awareness to environmental impact, in particular with regard to eco-friendly products and some initial steps towards the creation of environmental management systems has been taken within the construction sector (i.e. EMAS[4]). This helps to create an important opportunity for the sector in general and SMEs in particular, as sustainable products and environmentally friendly ways production systems can generate a decrease in the operating costs for companies.

Good practices of European companies in the construction sector show how companies are moving towards: the creation and adoption of environmental management systems, a greater awareness of the importance of the issue and the need to involve

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[4] Regulation (EC) n ° 761/01, known as EMAS (Eco Management and Audit Scheme), defines the requirements for sustainable environmental management by an organization.

and to train also workers. In particular, big companies are directly focusing their attention to environmental issues, but also SMEs which make up the supply chain are indirectly involved.

With particular reference to the partner countries, it is worthy to underline that in **Hungary**, eco-compatibility issue is gaining more and more importance, thank especially to consumers attention to environmental issues. However, a stronger companies adherence to the different existing regulations would be necessary and the government should invest more in projects encouraging and promoting eco-compatibility in the construction sector. We can find a different situation in **Austria**, where many companies, aware of the extensive opportunities of this new horizon in the sector, are competing in terms of eco-innovation, while the action of government is aimed at increasing awareness in civil society. In **Spain**, with regard to eco-compatibility, the construction market seems to be not yet mature. In fact, companies still aim at competitive prices and speed of production while the requirements for participation in public tenders are generally limited to the observance of the law. The situation seems to be similar in **Italy**, where a low awareness in society is combined to a companies' attention to environmental sustainability which is limited and highly costly. In **Portugal**, the cautiousness towards the implementation of eco-compatibility and environmental protection measures within the construction sector, due to high costs and to the fact that these investments do not have a return in the short term, is related to the crisis of the sector and to the government lack of attention towards the promotion and support to social responsibility practices.

2.2.4 Equal opportunities

Equal opportunities and diversity incorporates a number of different issues including women's rights, ethnic minority rights, sexual orientation and religion, among other things. Within the BRC Project, in order to reduce the complexity of the research and, at the same time, to deepen it, the focus was predominantly directed on gender equality or women's' participation within the construction sector.

This choice was made consciously, being the partners aware of the importance, within the sector, of other issues related to diversity, first of all the strong presence of immigrant workers on the building yard.

In general, it can be underlined that equal opportunities, specifically as it relates to gender equality, currently seem to receive limited attention from the construction sector. When compared with the current situation of women employed in the sector, it is clear that the complete integration of women into the construction sector is facing several impediments or obstacles. According to the analysis of best practices across Europe, a significant area of focus is training, that is encouraging women's studying of issues related to the construction sector and making the sector more accessible and attractive to women.

On the regulatory side, within the European context, specific interventions designed to regulate the issue of equal opportunities in the construction sector are not foreseen at the moment. The existing laws are characterized by a general value, aimed at regulating the issue within the different working sectors. Plus, in many cases, they just reflect the implementation of EU regulations and directives.

In order to provide a more representative picture of the current situation, given the absence of specific legislative actions in the construction sector, it is useful to note that equal opportunities are effectively perceived and managed by the figures working in the sector. For this reason, we suggest to refer to the interviews published in the last part of this document.

Looking at the researches carried out in the BRC partners countries, it is evident that, in all the cases, the presence of women in the construction sector is marginal and largely confined to the administrative tasks. The only exception seems to be the Hungarian case, where the issue of gender equal opportunities does not seem to be stronger in the construction sector than in others.

2.2.5 Supply chain

Within the construction sector, Supply Chain Management seems to be one of the weakest areas. With the terms of “supply chain”, we mean the different steps of production, from the designing, to the delivery or management of the asset (and therefore all the stages and actors working in the path). In the area of building-construction, in order to describe the supply chain, we talk about "cycle of the contract": the succession of all those activities that lead to the realization of a building (a term also used in the absence of contracts).

Therefore, this includes both all the activities which precede the effective production of a good - such as planning, in which the detailed characteristics of the work such as the materials or construction techniques or the supplying of raw materials are decided - and the activities of final buying and selling and of use/management.

Within the production cycle of the construction sector, it is possible to consider at least 5 different phases, generally valuable. They are:

- Preliminary phase: it provides the design of the work, the property development, the award of work and the conclusion of the contract.
- Building Supply: it includes all activities related to the production of raw materials, materials and equipment and installations needed for building or upgrading a property of any kind.
- Construction of the building: it comprises all activities that enable the construction or renovation of a building, including technical services, installation and maintenance of facilities and any testing activities. Potential supply chain operations of construction works are included.
- Buying and selling: it covers all activities of real estate buying and selling.
- Use and Management: this is last phase that includes both the use of the property to end users - whether they are private tenants, public agencies, businesses, etc... - and works for buildings' upgrading or decommissioning.

The actors involved in the different steps of the chain could be divided into main actors, if they directly participate to the activity of one or more phases, and secondary (supporting) actors, if they play supporting actions for the chain.

The supply chain framework analysis showed that, in principle, the production chain is not subject to specific regulatory measures aimed at regulating in detail the relationships activated along its path. However, supply chain is influenced by detailed and stringent laws referring to other issues. This influence is evident, for example, in the control that the general contractor exerted on sub-contractors in order to check its compliance with specific regulatory measures such as the health and safety ones.

In the research carried out, given the low level of regulatory interventions on the issue, the analysis of the production chain substantially focused on the identification of legislation on public procurement. In fact, public procurement, besides being one of the most regulated, is the instrument of assignment of work most frequently used in the construction sector. Legislation on public procurement is very complex, as well as very technical. For this reason, and for reasons of synthesis, please refer to the official Report for a deepen analysis of the European public procurement regulations.

In terms of sustainable management, the weakness of the supply chain is attributable, in addition to the complexity of this type of relationship, to the fact that the issues of sustainability and CSR are relatively new in the construction sector. Good practices and researches carried out by partners countries show very different situations which do not facilitate generalizations. Nevertheless, one substantial problem for sub-contracting companies in the construction industry can be identified on purchasing of environmentally friendly materials. Indeed, despite the products of this type exist, the companies seem unaware of or unable to identify them. Nonetheless, within the chain of sub-contracting of construction companies, according to the good practices found, environmental protection seems to be the most important issue considered in the evaluation of sub-contractors to the detriment of other aspects, first of all of the socially ones. However, considering the lack of compliance with health and safety regulations, the "dangerous" nature of the sector and the amount of illegal workers hired, social issues within the supply chain need to be reinforced and better addressed by construction companies. In this regard, the implementation of awareness about the importance of managing social and environmental issues for suppliers, and the benefits generated, could result a more effective instrument rather than intensifying the legislative framework.

A possibility could be through the engagement of "ambassadors" within the sector, namely larger companies which, because of their financial and human resource availability or through incentives by public authorities, could play the role of promoters of good practices. On one side, as already said, the lack of attention in the controls along the supply chain is due to the absence of clear and defined legislation (which can help create the basic requirements). On the other side, the complexity and the size of supply chains are determinant for the difficult of controls during the works, because they are characterized by a strong fractionation due to the intervention of many subjects involved for a very limited time. Another relevant problem in the construction sector, always with regard to the supply chain, is that, very often, small businesses are having as sub-contractors larger companies, on which they cannot exercise influence or control.

Many of these considerations do not emerge from the legislative analysis and therefore, in order to deepen these aspects, it is better to refer to the next part of the Report on the results of interviews with subjects working in the sector.

Driving the attention to partner countries, for **Hungary**, we can notice that, because of the length of the supply chain, there is a problem of mutual debt of companies, which is often added to the problem of corruption, and determine a lack of confidence on the potential competitive advantages generated by CSR practices in this area.

In **Spain**, there has been a strong push by the trade unions for the government to reinforce the legislative framework. However, the chain of sub-contracting, given its length and difficulty of control over suppliers, continues to be regarded as a difficult field of application for CSR practices.

In **Portugal**, a specific legislation governing the supply chain is largely absent.

Austria regulated the relationship between general contractors and subcontractors with legislative actions, and it is now possible to determine the liability of the general contractor over the work of the sub-supplier. This means that, especially large companies developed strong mechanisms for selecting suppliers, while the SMEs tend to prefer lo b cal, or in any case known, sub-contractors.

In **Italy**, because of complex historical reasons and experiences of criminal infiltration, the law has always imposed strong limitations and restrictions on subcontractors. As a consequent, it is necessary to strike a balance between the need of control historically necessary to the country and the principles of competition established by the Community.

3.3 An overall evaluation

As previously said, during Phase 1, desk research and analysis was accompanied by a field research, through the realization of in-depth interviews carried out with the engagement of different actors working or involved within the construction sector. As stated, the aim was to realize a basic picture of the sector through the different contributions of stakeholders' points of view and the recognition of their perceptions in relation to each of the four areas of CSR considered the project BRC.

In order to make the interviews, a specific questionnaire developed by Nouva Quasco was experimented, for which you can find a detailed description in section 2.1 of this document.

In particular, in total the 38 interviews realized in the 5 countries involved in the project (Austria, Italy, Portugal, Spain, Hungary) concerned 19 companies (equal to 50% of the sample), 6 companies associations, 7 public authorities, 8 between trade unions and other organizations.

The following part represents a comprehensive evaluation of the relevant information on competitive expectations regarding CSR in construction (1st part of the questionnaire), with about 1.200 signal (30% of them considered particularly relevant), collected in 32[5] questionnaires. With "signals", we mean the preferences assigned from time to time by the respondents and included in each box of detection.

It is important to note that the different and scarce number of cases analyzed within each country (6 in Austria, 12 in Italy, 7 in Portugal, 4 in Spain, 10 in Hungary) cannot allow reflections on specific national situations if not exclusively in terms of quality and with regard to the individual aspects covered in each report. Similarly, the average number of notifications for interviews is not always homogenous: very high in Spain and Hungary, quite restrained in Austria and Italy; a situation that could have had significant impacts with regard to the results for certain CSR topics.

Later on, a comparative analysis about the results coming from the focus on the four CSR dimension considered in the BRC project is realized (2nd part of the questionnaire).

[5] As described in the research methodological note, not completed questionnaires (7) were not included in the analysis. Thus, compared to the 39 interviews made, only 32 questionnaires are actually part of the analysis.

3.1 Competitive advantages and CSR issues

These opinions have been collected through a double-entrance matrix that crosses competitive expectations and selected CSR issues, considering country situation in the medium term period (3-5 years) and asking to people interviewed if they were thinking that the adoption of social responsible behaviours in these fields, will guarantee real competitive advantages for companies in the construction sector market. For each CSR area, it was asked to people interviewed to express their opinions in relation to each of the three main markets in which usually a construction company operates: public procurement, private procurement, real estate promotion. It has been also asked to them to indicate a scale of importance with regard to the various CSR areas in relation to competitiveness.

Following, the example of one of the table used for the survey, then replicated for each of the three markets.

Competitive Advantage CSR areas	Production Cost	Price Benefits	Capital Requi-rements	Customer Relations	Stakeholder relations	Socio-economic develop-ment	Other	Most relevant field = 1
Environment Sustainability								
Supply Chain								
Labour rights								
Health and Safety								
Training and Education								
Gender equality								
Bribery and Corruption								
Others								
GLOBAL								

The majority of the signals concerns public procurement (37,3%), followed by real estate promotion (31,5%) and private procurement (31,2%).

In general, more consistent expectations concern socio-economic development of communities (21,6%), customer relations (21,1%) and Stakeholder relations (21,3%). This three topics presents very similar results also because all of them present about 90 real significant signals.

The production costs place themselves at the fourth position (15,1% of total signals), followed by price benefits (12,2%) and by capital requirements (7,6%); other topics collected all together less than 2%, and no one relevant signal.

The CSR issues considered most important with a number of preferences more than 15% each are: Training and Education, Environment, Health and Safety, Supply Chain; with a consistent gap Bribery and Corruption (13,5%), Labour rights (11,1%), Gender equality (9,2%) follow; the remaining (Technological innovation, organization etc.) collect all together represent less than 3% of the total preferences, and only two cases are considerate really relevant.

It is interesting to notice that, if we consider only the ranking of the relevant signals, Health and Safety results one of the most important topic, followed on a pair by Environment and Bribery and Corruption.

The crossing between the CSR issues and the competitive expectations underline some important aspects. Customers relationship seem to be a fundamental area in which expectations of competitiveness in various fields focus: environment, supply chain and commitment against bribery and corruption. This last one obtains relevant values also in the stakeholder relationship and it is interesting to notice that Bribery and Corruption is the topic with the major connection with Capital requirements.

Another important concentration could be found in the case of Labour rights and Health and Safety issues having maximum values crossing with "socio-economic development of the Communities".

After the overview, we now move to specific frameworks and to differences.

The analysis has been realized starting from the identification of the major values registered in lines and columns and respectively indicative of the possible combinations between CSR issues and competitiveness advantage, precisely identified by the symbols shown in cells (first level scheme). Later on, the analysis has been delve considering also the second value registered for lines and columns and the major values of lines and columns concerning to the most important preferences (second level scheme).

1st level scheme

The principal benefits expected in the short-medium term in public procurement show a coincidence of interest on environment issues in the relationship with the public customer and on health and safety in the relationship with a wide range of stakeholders.

Public procurement tends to develop mainly on two CSR issues mainly due to a greater recognition of training and education and the supply chain. Also in this case are predominant three variable but, in comparison with the private procurement, the benefits of cost, price and capital requirement are most focused in relationship to the qualification of workforce and to the supply chain management. The fight against corruption is confirmed as fundamental factor in order to acquire capital resources. Maybe it is no coincidence that there are more preferences concerning the socio-economic development in comparison to the public procurement and is confirmed the environmental relationship with costumers.

The real estate promotion definitely emphasizes the coincidence of interests, already considered so far, in relation to customer relations on the environmental aspect, to the attention to the territorial development on health and safety issue and to the costs of production on the training and information and, compared to the previous figures, including one regarding training and education and production costs.

2nd level scheme

A second level of analysis, no longer focused only on the number of signals but also on their quality and intensity, may be useful to follow up what has been just described.

With regard to public procurement, it could be noticed that preferences assigned to the relationship with the customers enrich on significance many issues already analysed, starting from the environmental one but also with respect to the government sector and the training of workers.

Similarly, the coincidence of interests on health and safety acquires great importance in terms of relationships with stakeholders.

In the private procurement is confirmed the importance of the benefits connected to the socio-economic development and to the customers and stakeholder relations.
The supply chain is more acknowledge crossing to cost benefits, and environment and health and safety acquire importance in terms of benefits like stakeholder relations. The field of training and education is also strongly reinforced. It is important to notice, here again, that contrast to Bribery and Corruption extend itself to various competitive advantage.
Finally, in the real state promotion, it seems to find more recognition the actions and the impacts connected to environment and health and safety. The predominant benefits are again relational. Cost and price benefits are limited to training and education and to supply chain. It is also interesting to note how the contrast of bribery and corruption is relevant in relations with customers.

3.2 The four CSR dimensions within the BRC Project

The information (data) regarding each single partner country has already been addressed in the previous sections, so in this final section we will review the overall statistical data from 39 completed questionnaires, but pointing out that not all the respondents have provided all the requested information. Like for the previous framework, this happened when - for example - several interviewed actors considered themselves not in a position to provide advice on any matter but only where they could express the real skills and knowledge.
The comparative sight shows that people has different perception of the four BRC dimensions.
Also in this case, you can find below the tracking table that was used for the analysis of each of the four CSR areas covered by the BRC project.

Is H&S more important in the construction sector rather than in others?	**H&S is a real problem in construction today**	**A CSR approach in H&S could create competitive advantages in construction**	Please, take note of other details	
❐ Yes ❐ No	❐ Very important ❐ Important ❐ Less important ❐ Unimportant	❐ Very important ❐ Important ❐ Less important ❐ Unimportant		
MOST IMPORTANT ADVANTAGES	**In public procurement**	**In private procurement**	**In real estate promotion**	**Level of importance** **(Please, read the note)***
A CSR approach in H&S could create important cost advantages or in production levels*	❐ Yes. Please, explain in which way: ❐ No	❐ Yes. Please, explain in which way: ❐ No	❐ Yes. Please, explain in which way: ❐ No	❐ First ❐ Second ❐ Third
A CSR approach in H&S could create important price-benefit advantages*	❐ Yes. Please, explain in which way: ❐ No	❐ Yes. Please, explain in which way: ❐ No	❐ Yes. Please, explain in which way: ❐ No	❐ First ❐ Second ❐ Third
A CSR approach in H&S could create other important benefit advantages (specify)*	❐ Yes. Please, explain in which way: ❐ No	❐ Yes. Please, explain in which way: ❐ No	❐ Yes. Please, explain in which way: ❐ No	❐ First ❐ Second ❐ Third

* Please, in the last column give a level of importance among the three advantages mentioned.

The analysis shows, for example, that there is a spread acknowledgement of health and safety as a real problem in the sector (only the 5% consider it as less important or unimportant), but not so many people think that it is more critical in comparison with other sectors. Few people think that a CSR approach could to provide competitiveness advantage.

Probably, this opinion comes from the fact that this matter is extensively governed by law, both at national and European level, with results under the expectation. Indeed the application of the law is often deficient and many actors could think that there are not sufficient form of valorisation of the adoption of CSR behaviours. In any case, more than 50% of the sample think that from health and safety could come important competitive advantage and 29%, very important.

Less interest is emerged on equal opportunity in the construction sector: only the 37% of the sample consider it as a sectorial problem and only the 5,1% as an important problem. The great majority of people thinks that equal opportunity is a problem here less important in comparison with other sectors, nonetheless the frequent acknowledgment – during the interview – that the sector is quite totally discriminating.

The data on the impact of the adoption of a CSR approach in the field of health and safety are more unsatisfying, because very few people see competitive advantage. The percentage of the sample that see an important competitiveness vantage is 30,8%, as the percentage of people that think that this topic is most significant than in other sector is 35,9%.

The environmental issue registered a 71.8% of respondents who consider the eco-compatibility as a real sectorial problem and the number of those who believe that CSR can generate competitive advantages reaches about 67%. Both these results are more consistent in comparison with those who consider the problem most important in the construction sector than elsewhere (only 56.4%), demonstrating that the environmental issue is seen in a context of widespread and growing recognition and of which the construction is a cornerstone, but not the only one.

Finally, the supply chain is considered an important or very important problem (82% of the sample), and the 64,1% of the sample consider it a problem more important in comparison with other sectors. The majority of people interviewed (more than 66% of the sample) consider that a CSR approach to supply chain can produce some competitive advantage (for the 38,5% very important advantage).

Considering then the competitive advantage in details and, in particular, considering their articulation on the basis of the activities typology (public procurement, private procurement, real estate promotion) and, therefore, with considerations connected to the nature of the customers and of the works, interviewed people offered an evaluation also on the principal typology of potential advantage deriving for a CSR approach, as advantage of cost, price, and other (relational one). With regard to Health and Safety, the prevalence of advantage in terms of relationship in comparison to the others is evident as well as a narrowness of return in terms of economic benefits, with no particularly noticeable differences for the three categories.

In case of the equal opportunity the differences seem to be relevant yet and the benefits more limited, even the relational ones; and almost null in terms of price.
In the case of eco-compatibility, the differences seem to be more limited and, close to this homogeneity, it is evident the possibility to gain some advantages in terms of price benefits with regard in particular, although limited, to cost of production.
If the case of the supply chain the main advantages are again relational, although there is a significant percentage for what concerns the cost advantages within public procurement and, in any case, in at least 40% of cases.