Topic Group: Construction & Architecture

Meeting Report | April 22–24, 2026 | Berlin, Germany

Cost Control and Innovation

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Can Modular Construction Speed up Construction and Make Housing More Affordable in European Cities?

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INTRODUCTION

The 2026 meeting of the EFL Topic Group Construction and Architecture took place in Berlin from 22 to 24 April, hosted by Gewobag at its headquarters in Alt-Moabit. The meeting brought together housing professionals, architects, technical experts and construction specialists from several European countries to explore one of the most pressing questions currently facing affordable housing providers: how to build faster, more efficiently and more sustainably without losing control over affordability.

In their opening remarks, topic group leaders Jonas Kröber (Gewobag) and Fabien Lasserre (Vilogia) underlined that serial and modular construction are no longer niche discussions within the sector. Across Europe, housing providers increasingly face similar pressures: construction costs continue to rise, labour shortages affect delivery capacity, environmental standards become stricter and urban demand for affordable housing remains high.

The Berlin programme was deliberately structured to combine strategic presentations, technical exchange and visits to major projects currently under construction in Berlin. This practical approach reflects the core strength of EFL topic groups: direct peer exchange based on real projects and operational challenges.

Project Landsberger Allee

OPENING SESSION: CURRENT CHALLENGES FOR AFFORDABLE HOUSING DELIVERY

The meeting opened with a welcome by representatives of Gewobag, Markus Terboven (CEO) and Michael Brey (EFL Chairman/ Director Stiftung Berliner Leben) and EFL (Joost Nieuwenhuijzen).

A strong common understanding quickly emerged: in many European cities, traditional construction methods are struggling to deliver sufficient new housing at the speed and price level required. Its also the goal of the recently published European Affordable Housing Plan to increase the number of housing construction in Europe.

CURRENT CHALLENGES FOR AFFORDABLE HOUSING DELIVERY

The keynote session by Phillip Heinemann, KVL Group placed the Berlin discussions in a broader market context. Germany currently faces a significant annual housing delivery gap while construction costs have risen sharply in recent years. Similar developments are visible in many other European countries represented within EFL.
Industrialised construction methods were presented not simply as technical innovation, but as a possible structural response to converging pressures:

- rising material prices
- shortage of skilled labour
- climate obligations
- need for shorter delivery times

A key message throughout the discussion was that industrialisation only delivers value when scale, logistics and planning are properly aligned. Modular construction does not automatically reduce cost; rather, it offers better predictability and production control when embedded in strong project management.

SERIAL AND MODULAR CONSTRUCTION IN EUROPEAN PERSPECTIVE

Fabien Lasserre presented a comparative overview of current developments in France and the Netherlands.

France currently represents around 3% off-site market share, while the Netherlands has developed a significantly more mature industrial construction market with approximately 14.6%. In Germany it seems to be around 20%. Germany is expanding rapidly, particularly in large urban developments, but still faces regulatory barriers that slow wider adoption.

Sweden around 40%. We clearly see that even all the countries of UE are facing the same issues (strong lack of workers in building sector in 2035, housing crisis near the cities, low quality), EU is divided in 2 parts. Northern Europe helping the development of a new way of building (off-site), southern (and Ireland) testing these new solution but without a real launching supported by the government.

The distinction between serial and modular construction remained central:

- serial construction uses standardised 2D prefabricated elements
- modular construction uses complete 3D volumetric room modules

SITE VISIT 1 – LANDSBERGER ALLEE: EUROPE'S LARGEST MODULAR HOUSING PROJECT

The visit to Landsberger Allee gave participants direct insight into one of the most ambitious modular housing projects currently under construction in Europe. Located in Berlin-Lichtenberg, the development comprises **1,548 apartments**, the majority of which are intended as affordable or subsidised housing for low- and middle-income households, students and key workers. The project is being developed by Gewobag in cooperation with Daiwa House Modular Europe and is widely regarded as a flagship for industrialised housing delivery in Germany.

Recent technical publications describe the project as **Europe's largest modular residential development currently under construction**, built on a site of approximately 39,400 m^2. More than **3,000 factory-produced room modules** are being assembled on site, reducing construction time by approximately **50% compared with conventional methods.**

A key technical feature is the extensive use of **three-dimensional steel-based volumetric modules**, produced in Daiwa's German factory in Fürstenwalde, Brandenburg, which opened specifically to serve large German projects. Each module arrives on site with a high degree of completion:

- interior walls installed
- bathrooms prefitted
- electrical systems integrated
- windows already mounted
- façade interfaces prepared in factory conditions

This allows assembly to proceed under highly controlled logistics, with cranes positioning modules directly into structural sequence.

The buildings rise seven to eight storeys and combine modular units with a structurally stabilising concrete core system. Balconies are attached afterwards through a specially engineered thermal bridge connection system using **Schöck Isokorb thermal connectors**, enabling steel balconies to be mounted only after façade completion — highly important in modular sequencing.

Building Materials and Construction Logic

The project uses:

- steel structural modular frames
- concrete circulation cores
- prefabricated façade elements
- high-performance insulation systems
- industrially produced steel balconies

Participants noted that while modularity accelerates delivery, façade articulation remains important to avoid monotony. The façade design therefore uses variation in rhythm, colour and balcony placement to soften repetition.

Strategic Discussion During the Visit

This project clearly demonstrates that modular construction becomes economically convincing primarily when large volume can justify factory logistics, standardisation and repetitive planning.

For many EFL members, the main question remained whether similar economic conditions can be reproduced in smaller housing markets.

Project Landsberger Allee

SITE VISIT 2 – DIESTERWEGSTRASSE: SYSTEM CONSTRUCTION IN DENSE URBAN FABRIC

The second site visit took participants to Diesterwegstraße in Berlin-Pankow, where the project presented by GOLDBECK illustrated a different type of serial construction: not volumetric modular construction, but **industrialised system building based on prefabricated components.**

GOLDBECK's construction philosophy differs fundamentally from fully modular providers. Instead of complete room modules, the company uses an integrated system of industrially produced building elements assembled on site:

- precast concrete elements
- steel load-bearing structures
- prefabricated staircases
- industrial façade systems
- factory-produced windows and aluminium elements

The company manufactures most major components in its own European production plants, which increases delivery reliability and quality control.

This system allows significant acceleration compared with traditional building methods while retaining greater flexibility than full volumetric modular construction.

Construction Method

At Diesterwegstraße the emphasis lies on:

- repetitive structural grids
- highly coordinated façade production
- standardised floor layouts
- industrial MEP integration

The result is a hybrid between conventional construction and serial industrial delivery.

Participants noted that this method may be particularly relevant for many European housing providers because it combines:

- faster delivery
- architectural adaptability
- less dependence on specialised module transport

Compared with Landsberger Allee, the project showed clearly that not all industrialised housing requires full modularity.

Material Strategy

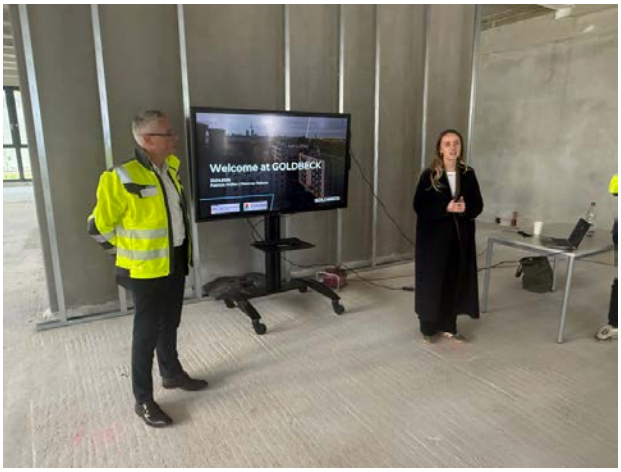
The project relies strongly on:

- reinforced concrete
- steel connections
- prefabricated façade panels
- integrated insulation systems

This offers robust long-term maintenance performance, which is highly relevant for affordable housing providers with long ownership horizons.

Strategic Relevance for EFL Members

Many participants considered this model potentially easier to replicate than full modular systems, especially where local contractors are familiar with concrete construction traditions.



SITE VISIT 3 – DAS NEUE GARTENFELD: INDUSTRIAL CONSTRUCTION AT URBAN DISTRICT SCALE

The visit to Das Neue Gartenfeld shifted the discussion from single-building technology to district-scale urban development.

Located on the former industrial island of Gartenfeld in Berlin-Spandau, the development covers approximately **31–59 hectares**, depending on development phase, and is designed to become one of Berlin's major new urban quarters.

By 2035, around **3,700 dwellings** will be delivered for approximately **7,400 residents**, together with offices, retail, social infrastructure and new mobility systems.

The part presented during the visit by MBN concerns major construction fields where MBN acts as general contractor.

MBN is currently delivering:

- 954 apartments
- 51 commercial units
- a 17-storey hotel
- a kindergarten
- parking infrastructure for around 1,100 vehicles

Construction Approach

Unlike Landsberger Allee, Das Neue Gartenfeld uses a broader combination of methods:

- reinforced concrete frame construction
- prefabricated concrete elements
- selected modular elements
- timber-frame applications in parts of the district
- highly standardised façade production

The technical challenge here is not only building speed, but coordination across multiple construction fields and contractors.

Sustainability Features

A particularly strong element is the district-wide sustainability concept:

- mixed heat supply technologies
- local energy systems
- low-car mobility strategy
- climate-adapted urban design

The district is frequently described in Berlin planning documents as a **model quarter for future urban development.**

REGULATION, DIGITALISATION AND STRATEGIC REFLECTIONS

One of the strongest common themes throughout the meeting concerned regulation.

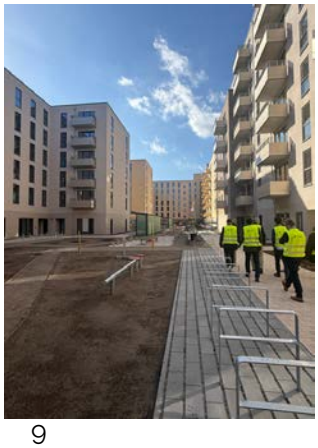
German experts explained that industrial systems often face repeated approval procedures even when technically identical systems are reused.

This undermines efficiency and limits scalability.

Several participants recognised similar barriers in their own countries.

The short contributions on digitalisation also showed that BIM, digital twins and digitally linked production systems increasingly become prerequisites for successful industrial construction.

For many EFL members the strategic conclusion was clear: industrialisation cannot be discussed separately from digitalisation, procurement and regulation.



CONCLUSIONS

The Berlin meeting confirmed that serial and modular construction are becoming structurally relevant for affordable housing delivery in Europe.

Several conclusions emerged clearly:

1. Scale remains decisive for economic viability
2. Regulation remains a major barrier
3. Hybrid systems increasingly dominate practice
4. Industrialisation and digitalisation are converging
5. No single model fits all national housing systems

The Berlin topic group once again demonstrated the practical strength of EFL's peer exchange model: learning directly from operational projects, comparing national realities and identifying realistic strategic options for affordable housing providers.

LIST OF ATTENDEES

We welcome attendees from France, Germany, Netherlands, UK, Switzerland and Ireland.

Joost Nieuwenhuijzen	EFL	Executive Director
Roman Riebow	Gewobag Wohnungsbau-Aktiengesellschaft Berlin	Head of IT
Fabien LASSERRE	VILOGIA	Head of technical and innovation dept
Johann Strese	Housing Initiative for Eastern Europe (IWO e.V.)	Project Director
Karine Jegiazarjana	Initiative Wohnungswirtschaft Osteuropa (IWO)	Project Director
Daniela GALARZA-RIOS	VILOGIA	European Projects Officer
Kilian Eckle	RoofUz and BDBau (Bundesverband Digitales Bauwesen - BDBau.org)	Founder and Board member
Philipp Meier	GWH	Prokurist
Hans-Michael Brey	SBL/EFL	CEO
Louis Fougerousse	Groupe POLYLOGIS	Project Manager
Dr. Anne Schmedding	Stiftung Berliner Leben / Gewobag	Special Representative of the Board
Brigitte Verscheure Beauzamy	AFPOLS	Consultant
Holger Schaffranke	Hennigsdorfer Wohnungsbaugesellschaft mbH	CEO
Ruaidhri Tulloch	Domnis/AGEFO	Délégué Général Adjoint
Olivier Mabille de Poncheville	Domnis/AGEFO	Président
Jacques-Emmanuel PEREZ	AGEFO / DOMNIS	CEO
BONJOUR	Living in Metropolises sce	Aufsichtsratvorsitzender

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Benjamin Wichert	Joseph-Stiftung	Architect
Jon Anderson	Choice Housing (Ireland) Ltd	Group Director of Development
Knut Hoeller	IWO e.V.	Executive Board Member
Oliver Falk-Becker	Gewobag AG	Head of Business Development
Jon Anderson	Choice Housing	Group Director of Development
Jens Vandenheede	Gewobag EB	Project Development Manager
Christian Müller	Joseph-Stiftung Bamberg	Architect
Ebe Ezeonu	Places for People Limited	Assistant Development Manager
Ferdinand Kumle	lookthrough	COO
Louis Fougerousse	Polylogis	Project Manager

CONTACT/INFO EUROPEAN
FEDERATION FOR LIVING

Official Postal address
P.O. Box 67065
NL-1060 JB Amsterdam
info@ef-l.eu
www.ef-l.eu