

Market potential of offsite construction for housing supply

Fields marked with * are mandatory.

Online survey on the market potential of offsite construction for housing supply

The survey is part of a research study for the European Commission which aims to understand the existing market for offsite construction and its potential to accelerate the supply of housing in a cost-effective way. The survey builds on research carried out by the Technical Secretariat of the High Level Construction Forum: [Research Note on Offsite Construction](#)

The survey is addressed to respondents familiar with offsite construction within the EU (i.e most components are manufactured in a factory and then assembled on-site).

The survey is structured into four main sections:

1. Barriers to offsite construction
2. Market dynamics and client acceptance
3. Policies and regulations
4. Available technology

Time to complete ~ 15 minutes.

The survey will close on 19th March 2025. We appreciate your participation.

Before completing this survey, please read our privacy statement below and provide your consent by ticking the box below. Please note we will not be able to accept your survey without your consent. Thank you for your understanding.

[Privacy Statement for Offsite Construction Consultations DPR-EC-01011 .pdf](#)

* Do you agree and hereby give your consent to the processing of your personal data to the extent necessary for the analysis of the survey results?

- I agree
 I disagree

Screening Questions

* Which is the main country of your operation (and for which you will primarily answer this questionnaire)?

Maximum 1 selection(s)

- Austria
- Belgium
- Bulgaria
- Croatia
- Cyprus
- Czech Republic
- Denmark
- Estonia
- Finland
- France
- Germany
- Greece
- Hungary
- Ireland
- Italy
- Latvia
- Lithuania
- Luxembourg
- Malta
- The Netherlands
- Poland
- Portugal
- Romania
- Slovakia
- Slovenia
- Sweden
- Spain
- EU level representation
- Other (non-EU country)

Do you also work in other EU countries? If yes, then please select which, and otherwise skip this question:

- Austria
- Belgium
- Bulgaria
- Croatia
- Cyprus
- Czech Republic
- Denmark
- Estonia
- Finland
- France
- Germany
- Greece
- Hungary

- Ireland
- Italy
- Latvia
- Lithuania
- Luxembourg
- Malta
- The Netherlands
- Poland
- Portugal
- Romania
- Slovakia
- Slovenia
- Sweden
- Spain

* What is your primary role?

Maximum 1 selection(s)

- Product Manufacturer or Supplier
- Contractor
- Designer, Architect or Engineer
- Consultant or Project Manager
- Developer, Real estate or Investor
- Policymaker or Public Official
- Researcher or Academic
- Industry Association
- Installer or on-site subcontractor
- Other

Section 1: Barriers to Offsite Construction

* What are the main barriers you encounter in advancing the adoption of offsite construction? (Select up to 3)

between 1 and 3 choices

- Financial barriers
- Regulatory and policy barriers
- Market demand (lack of demand, or high volatility)
- Low client or user acceptance (e.g. negative perceptions of limited design flexibility, quality, or durability).
- Supply chain issues
- Lack of skilled labour
- Issues with on-site assembly or installation
- None
- Other

* What are the main financial barriers you encounter?

- High investment costs
- Difficulties securing investment

- Low profit margins
- Difficulties to get insurance
- Other

What are the main regulatory and policy barriers you encounter?

- Limitations in regulations for on-site assembly and installation
- Limitations in other building regulations
- Limitations in permitting processes
- Difficulties with procurement or tendering
- Inadequate or inconsistent government policies
- Other

Section 2: Market Dynamics and Client Acceptance

How do you perceive the demand for offsite construction in the EU?

- High demand
- Moderate demand
- Low demand
- No demand
- I do not know

How do you expect the **EU offsite construction market** to develop in the next 5 years?

- To grow
- To remain the same
- To decline
- I do not know

What differences between countries do you observe in the market of offsite construction? What are the leading countries in Europe? Are some countries better suited to offsite than others?

In Europe, offsite construction is most advanced in the UK, Germany, Benelux and Nordic countries. This is mainly linked with weather conditions, availability and costs of construction workers, and traditions.

In which **types of housing projects** is there the highest demand for offsite construction in your country?

between 1 and 5 choices

- Single-family residential housing
- Multi-family residential housing (e.g., apartments, condominiums)
- Mixed-use residential buildings (residential with integrated retail or office spaces)
- Social housing
- Student housing
- Senior or assisted living facilities
- Emergency or temporary housing (e.g., disaster relief, refugee housing)
- Non-residential construction (Commercial buildings, storages, infrastructure)
- Other

- I do not know
- None

Which **types of housing projects** are most suitable for offsite construction?

between 1 and 5 choices

- New single-family homes
- New multifamily homes and apartment buildings
- Renovations of single-family homes
- Renovations of multifamily homes and apartment buildings
- New non-residential buildings
- Renovations of non-residential buildings
- Mixed-use developments that include housing (either new or renovated)
- Changes of use to housing (including empty buildings)
- Other
- I do not know
- None

Other (please explain)

Social & affordable housing.

* Do you think offsite construction can reduce **costs** compared to conventional methods?

- Yes, between 0-5%
- Yes, between 5-10%
- Yes, between 10-20%
- Yes, between 20-30%
- Yes, between 30-50%
- Yes, by over 50%
- No
- I do not know

* Do you think offsite construction can reduce **project time** compared to conventional methods? (from design to finished project).

- Yes, between 0-5%
- Yes, between 5-10%
- Yes, between 10-20%
- Yes, between 20-30%
- Yes, between 30-50%
- Yes, by over 50%
- No
- I do not know

What types of **financial incentives or other support mechanisms** would best encourage growth in offsite construction?

Maximum 2 selection(s)

- Public subsidies or grants

- Preference for offsite construction in public procurement
- Premium for early completion in construction contracts
- Other
- None

In your opinion, what are the most effective ways to grow the market for offsite construction for housing?

To grow the market for offsite construction in housing, it is essential to raise awareness of its benefits, such as full life-cycle cost reductions and time savings, while encouraging government support through incentives, preferential procurement policies and premium for early completion. Standardising components and fostering collaboration across the supply chain can improve efficiency, while investing in technology and automation will enhance scalability and affordability, making offsite solutions more accessible.

* How would you describe the level of **client acceptance** of using offsite methods for construction?

- Clients are strongly supportive of using offsite methods
- Clients can be supportive as long as there are clear benefits for them
- Clients generally oppose using offsite methods
- Clients have no strong opinion
- I do not know

Which features of offsite construction are most important to your clients?

Maximum 3 selection(s)

- Familiarity with offsite construction
- Costs
- Speed of project delivery
- Sustainability (Lower construction Carbon footprint)
- Energy efficiency of finished building
- Design flexibility
- Customisability and flexibility
- Quality assurance and durability
- Adaptability for future renovations
- Safety of finished building
- Construction site safety improvements
- Project Scalability
- Prior positive experience with offsite construction
- Minimal on-site disruption
- My clients are not specifically interested in offsite construction and its features.
- Other
- None

Section 3: Policies and Regulations

* Do building codes or local regulations facilitate the use of offsite construction in the main country of your activity?

- Yes, they work the same as for conventional methods

- Partially, but gaps are observed and updates are needed
- No, they act as a barrier to offsite construction
- I do not know

Would you like to elaborate on how building codes or local regulations act as a barrier for you?

Additional requirements and lack of level-playing field with on-site solutions.

Which areas of national or regional policies should be modified to support the uptake of offsite construction in your country?

between 1 and 5 choices

- Update building codes to address gaps and inconsistencies
- Align relevant building codes with those of other countries/regions
- Make it easier to access services and skilled labour across borders
- Streamline planning or building permit processes
- Financial incentives or subsidies
- Update public procurement policies and requirements
- Update requirements on environmental sustainability
- Update requirements on health & safety
- Investing in education and training
- None
- Other

Do you know of any national policies or incentives encouraging offsite construction? If so, please provide them below:

Yes, several European countries offer incentives for offsite construction. The UK provides financial support through the "Offsite Construction Programme," Germany promotes sustainable methods via tax benefits under the "Building Energy Act," and countries like the Netherlands and Sweden offer subsidies for sustainable building projects, including offsite techniques. These policies aim to reduce whole-life costs, construction times, and environmental impacts.

Do you have any policy recommendations or regulatory best practices you can share? If so, please provide them below:

Policy recommendations include updating building codes to address offsite construction needs (whole life-cycle assessment), streamlining planning and permit processes, and providing financial incentives to support the higher initial costs and reward early completion. Aligning regulations across Europe and investing in training for a skilled workforce would also support growth in offsite construction.

Section 4: Available Technology and skills

* Which of the following emerging technologies do you believe will have the greatest impact on offsite construction in the next 5–10 years?

Maximum 3 selection(s)

- Advanced robotics for automated assembly
- 3D printing and additive manufacturing
- Advanced materials
- Artificial intelligence
- Digital twins and real-time monitoring (IoT)
- Improved transport and logistics solutions
- Other
- None

* Has your organisation encountered problems with the availability of skilled labour for construction?

- No
- Yes, for conventional construction
- Yes, for offsite construction
- Yes, both for conventional and offsite construction

If yes, please specify the type of labour

What areas of research and innovation, if any, do you believe need more focus to advance offsite construction?

Research should focus on advancing materials, improving automation and robotics, and optimising design tools like BIM for better integration and efficiency in offsite construction.

Closing questions

Do you have any other suggestions regarding offsite construction as a solution to increase the supply of housing?

Offsite construction can help increase housing supply by speeding up construction and improving efficiency. Whilst initial costs might be higher, the benefits in terms of quality, reduced work on site, adaptability and flexibility make the offsite solutions competitive (less expensive) on the whole life-cycle of the construction work. Greater standardisation and industry collaboration would further enhance its effectiveness.

If you have any relevant documents related to offsite construction, please upload them here.

Only files of the type pdf,doc,docx,odt,txt,rtf are allowed

Contact

[Contact Form](#)

