Life Giga Regio Factory

Prefabricated renovation solutions library, classified and characterized with common indicators

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giga regio factory
by energie sprong

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Prefabricated renovation solutions library, classified and characterized with common indicators

Industrialised and Off-Site Renovation Solutions Libraries

This report presents a public synthesis of the solutions mapping work carried out within the LIFE Giga Regio Factory project under Deliverable D2.1. It focuses on prefabricated façade systems and industrialised renovation solutions identified across participating countries, and provides a structured and strategic reading of market maturity and scaling potential.

The document is intended for public authorities, housing organisations, industrial suppliers, clusters, financial institutions and other stakeholders seeking to better understand the available industrialised renovation solutions and the conditions required for their large-scale deployment.

Scope and positioning of the report

This public report builds on the analytical work carried out under Deliverable D2.1 to develop national libraries of prefabricated renovation solutions.

It provides a consolidated and accessible overview of the methodology, the common framework used to describe solutions, and the cross-country insights on ecosystem maturity and scaling potential.

The document does not constitute a commercial catalogue. It offers a structured analytical tool to support demand aggregation, ecosystem coordination and large-scale deployment of industrialised renovation systems.

Detailed national catalogues are available in the annexes.

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Executive Summary - **From Solutions to Scale: Industrialised Renovation Ecosystems in Europe**

Europe faces an unprecedented renovation challenge. Millions of dwellings must be upgraded in the coming decades to meet climate targets, reduce energy poverty and improve living conditions. Yet the current pace of deep renovation remains far below what is required.

Industrialised and off-site renovation offers a scalable alternative to traditional construction methods. By transferring key activities from the building site to factory environments, prefabricated façade systems enable shorter installation times, improved quality control, cost predictability and higher performance consistency.

The LIFE Giga Regio Factory project (GRF) was launched to accelerate the market uptake of such industrialised solutions across Europe. A central component of this effort is the development of national libraries of prefabricated renovation systems. These libraries are not promotional catalogues. They are structured tools designed to clarify market maturity, align supply and demand, and support scaling strategies.

This document presents the analytical overview of the libraries developed for Germany, Italy, France and Belgium. Each country illustrates a different stage of ecosystem development:

- Germany demonstrates a mature and increasingly industrialised serial renovation market, supported by aggregation strategies and structured supply chains.
- France shows a coordinated innovation ecosystem transitioning toward larger-scale industrial deployment.
- Italy represents a technically capable but still consolidating market, where industrialisation must adapt to fragmented ownership structures and regional specificities.
- Belgium offers strong cross-border potential, particularly through synergies with neighbouring French production hubs.

Across all four countries, common patterns emerge. Industrialised renovation becomes viable at scale when five conditions are aligned:

1. Stable policy frameworks
2. Aggregated demand pipelines
3. Regional production capacity
4. Early involvement of industrial actors in design
5. Clear performance-oriented business models

The national catalogues of solutions, including detailed system descriptions, are available in the annexes of this document. They provide complementary technical information supporting the strategic analysis presented here.

Industrialised renovation is not merely a technical innovation. It represents a structural transformation of how deep renovation is organised and delivered. The objective is no longer to multiply isolated pilot projects, but to stabilise industrial pipelines and enable replication at regional and European scale.

The GRF solutions libraries contribute to this transformation by bridging market intelligence, industrial capacity and climate ambition.

Content

Glossary

Aggregated demand

The grouping of multiple buildings or housing units into a coordinated renovation programme in order to achieve economies of scale and enable industrial production.

Building cluster

A group of buildings sharing similar characteristics such as typology, construction period, geometry or performance level, allowing standardised renovation approaches.

Deep renovation

A renovation intervention achieving a significant improvement in energy performance, typically addressing the building envelope and systems in an integrated way.

Design for Disassembly

A design approach that enables building components to be dismantled and reused or recycled at the end of their lifecycle.

Industrialised renovation

A renovation approach based on standardised, repeatable systems manufactured in controlled factory environments and installed on site with reduced construction time.

Off-site construction

Production of building elements in a factory before transport and installation on the building site.

Prefabricated façade system

A factory-manufactured envelope element designed to improve thermal performance and installed externally, often integrating insulation, cladding and sometimes windows or ventilation components.

Regional production hub

A factory or industrial facility serving a defined geographic area, optimising transport distances and deployment efficiency.

Serial renovation

A standardised and repeatable renovation approach applied to multiple buildings or portfolios using similar industrial systems.

System integrator

An actor responsible for coordinating the technical integration of prefabricated components into a coherent renovation system.

Transport radius

The geographic deployment range within which prefabricated elements can be transported economically and environmentally efficiently.

1. Introduction – Industrialised renovation as a lever for scaling climate action

Europe has set ambitious climate and energy targets. Yet the pace of deep renovation remains far below what is required. Millions of dwellings must be upgraded in the coming decades to improve energy performance, reduce greenhouse gas emissions and tackle energy poverty. At the current speed, these objectives will not be met.

The challenge is not only technical. It is structural. Traditional renovation relies on fragmented on-site processes, limited workforce availability and project-by-project design approaches. As a result, deep renovation remains slow, costly and difficult to scale.

Industrialised and off-site renovation offers a different pathway.

By transferring a significant share of construction activities from the building site to controlled factory environments, prefabricated façade and envelope systems enable shorter on-site interventions, improved quality control, better cost predictability, reduced disturbance for residents and more consistent energy performance outcomes.

Within this context, the LIFE Giga Regio Factory project aims to accelerate the market uptake of industrialised renovation solutions across Europe. The initiative focuses on strengthening regional ecosystems capable of delivering prefabricated, integrated renovation systems at scale, combining industrial production capacity, digital design processes and coordinated implementation models.

As part of this effort, GRF has developed national libraries of prefabricated renovation solutions. These libraries are not simple catalogues. They are structured frameworks designed to create a shared language between housing providers and industrial suppliers, clarify technical and logistical parameters, support aggregation strategies and enable cross-border learning.

This document presents the German solutions library. It explains why it was developed, how it was structured and how it can support scaling strategies in Germany and beyond.

2. Why develop a solutions library?

Industrialised renovation is gaining visibility across Europe. However, the market remains fragmented, unevenly structured and difficult to navigate.

Housing providers, public authorities and project developers often face similar challenges:

- Limited visibility on available industrial solutions
- Difficulty comparing systems with different technical logics
- Uncertainty regarding production capacity and scalability
- Lack of clarity on implementation constraints
- Limited alignment between building typologies and industrial offers

At the same time, solution providers operate in rapidly evolving ecosystems. Many industrial actors develop high-quality systems but struggle to position them within a broader market narrative. Descriptions are often technical, company-specific and not easily comparable across regions or countries.

The absence of a shared framework slows down decision-making and limits replication.

The objective of the GRF solutions library is therefore not to create a promotional catalogue, nor to rank companies. It is to introduce structure.

The library provides a common vocabulary to describe prefabricated renovation systems in a consistent and comparable way. It focuses on key parameters that matter for scaling:

- Functional scope of the system
- Production logic and capacity
- Transport and geographic radius
- Building compatibility constraints
- On-site implementation requirements
- Services and performance outcomes

By organising information along these dimensions, the library helps bridge the gap between supply and demand.

For housing organisations, it supports early-stage screening and aggregation strategies.

For industrial actors, it clarifies positioning within a regional ecosystem.

For policymakers, it offers visibility on market maturity and scaling potential.

In short, the solutions library is a matchmaking tool. It connects buildings, demand clusters and industrial capacity within a coherent framework.

3. Methodology and structure of the library

The objective was to create a tool that is both rigorous and easy to use.

Rather than building a static catalogue, the GRF team developed a structured framework capable of describing industrialised renovation systems in a comparable way across countries.

The approach was guided by three principles:

1. Keep the framework simple and operational
2. Focus on scaling-relevant indicators
3. Ensure comparability across regions

3.1. A functional focus on prefabricated façade systems

The library concentrates primarily on prefabricated façade renovation systems for residential buildings.

Façades represent a major share of heat losses in multi-family housing and are particularly suitable for industrialised, crane-installed solutions. They also allow significant performance upgrades with limited disturbance for residents.

While roof systems and energy modules are relevant, façade systems provide the most scalable and comparable entry point across national markets.

3.2. A linear reading of the renovation process

To ensure clarity, each solution is described along a simplified process logic:

- Before installation
- During installation
- After installation

This structure reflects the real-life industrial and implementation sequence.

Before installation

This section captures factory-related and logistical parameters, including:

- Production capacity
- Panel dimensions and structural material
- Transport radius and geographic reach
- Minimum and optimal façade surface requirements

These indicators help assess scalability and regional deployment potential.

During installation

This section focuses on building compatibility and on-site constraints, such as:

- Maximum building height
- Architectural typologies targeted
- Panel fixing systems
- Crane and access requirements
- Site storage needs

These elements are essential for matching solutions with building clusters.

After installation

This section addresses performance and added value, including:

- Energy performance level
- Integration of windows or shading
- Possibility of additional services such as balconies or extensions
- Environmental considerations such as circularity or biobased materials

This perspective ensures that the system is not evaluated only as a technical component, but as a transformation of the building.

3.3. A dynamic data collection approach

Information was gathered through structured exchanges with solution providers and ecosystem actors. A standardised form was developed to ensure consistency in the type of information collected.

The objective was not to request confidential or commercially sensitive data, but to collect robust, indicative parameters that allow comparison and strategic analysis.

The resulting dataset can be filtered and interpreted according to different needs, whether architectural, logistical or strategic.

The methodology therefore creates a bridge between technical description and market intelligence.

4. Germany: structuring industrialised renovation at scale

The detailed German solutions library is not reproduced in annex to this public report. It was originally developed within the framework of the Energiesprong programme, which structured early serial renovation approaches and industrial solution mapping in Germany. The library remains publicly accessible online here.

Within the LIFE Giga Regio Factory project, this existing Energiesprong work served as a methodological reference and practical benchmark for the development of the French, Italian and Belgian solution mappings. It contributed to establishing a shared structure, comparable indicators and a common vocabulary across countries.

Rather than duplicating existing material, this report builds on that prior experience and focuses on cross-country analysis and strategic insights derived from the comparative approach.

4.1. A structured ecosystem moving towards industrial scale

Germany is currently one of the most advanced European markets in the field of industrialised and serial renovation.

The scale of the challenge is considerable. A very large share of the residential building stock was constructed between the 1950s and the 1980s and now requires deep energy refurbishment. At the same time, rising energy prices, carbon reduction targets and regulatory pressure are accelerating the need for high-performance renovation solutions.

In this context, serial and industrialised renovation has gained strong momentum over the past years.

4.2. Market maturity and ecosystem dynamics

Germany benefits from several structural advantages:

- A strong industrial base with advanced prefabrication capacity
- A well-organised housing sector capable of aggregating demand
- Public funding schemes supporting high-performance renovation
- A growing ecosystem aligned with the Energiesprong approach

The German market has moved beyond experimentation. Industrial renovation is increasingly seen not as a niche innovation, but as a credible pathway to scale deep retrofit.

Standardisation, repeatability and portfolio-based renovation strategies are progressively replacing isolated pilot projects.

4.3. Typical system approaches identified

The German solutions referenced in the GRF library illustrate several recurring typologies.

Timber-based prefabricated façade panels

A large share of German systems rely on timber frame or timber-hybrid prefabricated façade panels. These panels are typically:

- Manufactured off-site under controlled conditions
- Designed to integrate insulation, cladding and sometimes windows
- Compatible with multi-family housing typologies from post-war periods
- Installed by crane to minimise on-site duration

Timber solutions are often positioned as low-carbon alternatives and align with circular economy principles.

Integrated façade systems

Some providers offer more integrated approaches, including:

- Pre-installed windows
- Integrated ventilation ducts
- Optional façade-integrated photovoltaic modules
- High levels of airtightness and performance guarantees

These systems aim to reduce on-site interfaces and move towards performance-based renovation models.

Bio-based and circular-ready systems

An emerging segment focuses on:

- Bio-based insulation materials
- Design for disassembly
- Environmental product declarations
- Lifecycle-oriented thinking

This reflects a broader shift in the German construction sector towards embodied carbon considerations, in addition to operational performance.

4.4. Industrial logic and scaling potential

A defining feature of the German ecosystem is the emphasis on industrial logic.

Key characteristics include:

- Defined production capacities expressed in square metres per day
- Clear geographic deployment radius linked to transport optimisation
- Targeting of building clusters rather than single buildings
- Early involvement of industrial actors in the design phase

This industrial mindset enables:

- Greater cost predictability
- Reduced installation time
- Portfolio-level replication

Germany therefore represents a mature environment where industrial renovation is transitioning from innovation to market structuring.

4.5. Strategic insight for replication

The German case highlights several lessons for other regions:

- Demand aggregation is a prerequisite for industrial efficiency
- Standardisation does not exclude architectural adaptation
- Regional production hubs strengthen economic viability
- Public funding frameworks accelerate ecosystem alignment

While not all regions currently display the same level of structuring, the German experience demonstrates that industrialised renovation can become a mainstream pathway when supply, demand and policy are aligned.

5. Italy: an emerging industrial retrofit ecosystem in transition

Italy presents a different landscape compared to Germany. While the need for deep renovation is equally significant, the industrialisation of retrofit processes is still at an earlier stage of structuring.

The Italian residential stock is highly diverse, with strong regional variations, a large share of small condominium ownership structures and significant seismic considerations in many areas. These characteristics influence both the pace and the technical configuration of industrialised renovation solutions.

5.1. Market context and structural constraints

The Italian market has recently experienced intense renovation activity, largely driven by fiscal incentive schemes. This created a surge in demand but did not always lead to long-term industrial structuring.

Industrialised off-site renovation remains emerging rather than mainstream. Key characteristics include:

- Fragmented ownership structures
- Smaller average building portfolios compared to Northern Europe
- Strong architectural heritage considerations
- High relevance of seismic upgrading in certain regions

These elements make standardisation more complex but also create strong incentives for integrated and performance-based solutions.

5.2. Typologies of systems identified

The Italian solutions referenced in the GRF library illustrate a smaller but evolving ecosystem.

Prefabricated façade panels with hybrid structures

Some Italian providers are developing:

- Timber or light steel frame prefabricated panels
- Systems designed to improve both energy and seismic performance
- Façade modules adapted to heterogeneous building geometries

Seismic integration is a distinctive feature in Italy compared to other markets.

Modular systems targeting condominium buildings

Given the prevalence of multi-owner buildings, solutions increasingly focus on:

- Reducing on-site duration
- Limiting disturbance for residents
- Providing clear performance guarantees

The condominium context requires high clarity on costs, timelines and technical reliability.

Early-stage industrial positioning

Unlike Germany, Italy does not yet display a dense ecosystem of serial renovation providers operating at industrial scale. However:

- Technical know-how is present
- Manufacturing capabilities exist in related sectors
- Interest in structured aggregation strategies is growing

The Italian market can therefore be described as technically capable but still consolidating its industrial retrofit identity.

5.3. Industrial logic and scaling potential

Scaling in Italy depends on three critical factors:

- Moving from incentive-driven peaks to stable industrial pipelines
- Aggregating buildings beyond single condominium projects
- Aligning energy renovation with seismic upgrading where relevant

The transition from opportunistic market expansion to structured industrial ecosystems will determine the long-term viability of serial renovation in Italy.

5.4. 4. Strategic insight for replication

The Italian case highlights that:

- Industrialisation must adapt to ownership fragmentation
- Integrated energy and seismic approaches can be a differentiator
- Stable policy frameworks are essential to support industrial investment
- Cross-border learning can accelerate ecosystem structuring

Italy therefore represents a high-potential but still consolidating industrial retrofit market.

6. France: scaling industrial retrofit through structured innovation

France occupies an intermediate position between Germany and Italy. The industrialisation of renovation has gained strong visibility, particularly through structured experimentation and the Energiesprong dynamic, but full-scale industrial maturity is still progressing.

The French residential stock includes a significant share of post-war multi-family housing managed by social housing organisations, which creates favourable conditions for demand aggregation.

6.1. Market structure and enabling factors

France benefits from:

- Large social housing portfolios
- Strong public policy engagement in energy transition
- Structured innovation programmes
- Active ecosystem animation

The Energiesprong approach has contributed to aligning housing providers, designers and industrial suppliers around repeatable and performance-oriented models.

However, scaling remains uneven and regional disparities persist.

6.2. Typologies of systems identified

The French solutions referenced in the GRF library illustrate a growing diversity of industrial approaches.

Timber-based prefabricated façade systems

These systems typically include:

- Insulated panels manufactured off-site
- Optional integration of windows and ventilation components
- Installation by crane to reduce site duration

Timber solutions are often positioned within low-carbon construction strategies.

Steel and hybrid prefabricated systems

Other providers rely on:

- Light steel frames
- Hybrid structural approaches
- Ventilated façade configurations

These systems emphasise robustness, adaptability and industrial repeatability.

Integrated envelope and service solutions

Some actors aim to move beyond envelope-only interventions by:

- Integrating energy production modules
- Offering performance-based guarantees
- Developing platform-based approaches

This signals a shift from component suppliers to system integrators.

6.3. Industrial logic and scaling trajectory

France demonstrates strong experimentation capacity but continues to structure its industrial pipeline.

Key features include:

- Increasing use of aggregation strategies
- Development of regional production hubs
- Emphasis on architectural integration
- Attention to embodied carbon performance

Scaling depends on moving from pilot logic to predictable, portfolio-based deployment.

6.4. Strategic insight for replication

The French experience shows that:

- Ecosystem coordination is as important as technical innovation
- Demand aggregation through social housing portfolios is a strong accelerator
- Industrialisation must align with architectural quality expectations
- Public procurement frameworks can support repeatability

France therefore represents a structured innovation ecosystem transitioning toward industrial maturity.

7. Belgium: leveraging cross-border synergies for industrial retrofit development

Belgium currently shows a more limited level of structuring in industrialised renovation compared to Germany and France. However, its geographic proximity to mature ecosystems creates strategic opportunities.

7.1. Market characteristics

The Belgian housing stock shares similarities with neighbouring regions:

- Multi-family buildings requiring deep renovation
- Growing policy pressure for energy performance
- Strong construction expertise

Yet the industrial retrofit ecosystem remains less consolidated.

7.2. Emerging dynamics

Belgium displays:

- Technical know-how in prefabrication
- Interest in industrialised solutions
- Smaller domestic market scale

Industrial retrofit is present but not yet fully structured around serial renovation models.

7.3. Cross-border opportunity with France

Belgium's proximity to Northern France creates natural synergies:

- Reduced transport distances
- Shared building typologies
- Cultural and regulatory familiarity
- Opportunity for shared production hubs

Cross-border cooperation could:

- Accelerate Belgian market structuring
- Optimise production capacity utilisation
- Reduce investment risks for suppliers

Rather than developing in isolation, Belgium can leverage regional industrial dynamics to strengthen its own ecosystem.

7.4. Strategic insight

The Belgian case illustrates that:

- Industrialisation does not always require national critical mass
- Regional cooperation can compensate for smaller domestic scale
- Shared vocabulary and data frameworks facilitate cross-border deployment

Belgium therefore represents a promising ecosystem that can accelerate through strategic alignment with neighbouring markets.

8. Conclusion - From mapping solutions to enabling scale

The development of national libraries of industrialised renovation solutions within the GRF framework demonstrates a clear reality: prefabricated façade systems for deep renovation already exist across Europe. They are technically mature, increasingly diversified and capable of delivering high-performance outcomes.

However, their deployment at scale remains uneven.

The comparison between Germany, Italy, France and Belgium highlights different levels of ecosystem structuring. Some markets are already moving toward portfolio-based industrial deployment. Others are still consolidating supply chains or aligning policy and industrial capacity. In all cases, the transition from isolated projects to repeatable industrial processes requires coordination.

The solutions library contributes to this transition in three ways.

First, it establishes a shared vocabulary. By describing systems through comparable indicators such as production capacity, transport radius, building compatibility and installation logic, it reduces ambiguity and facilitates early-stage decision-making.

Second, it supports demand aggregation strategies. Industrial renovation becomes economically viable when building portfolios are clustered and aligned with regional production capacity. The library helps identify these matches.

Third, it enables cross-border learning. Regional ecosystems do not develop in isolation. Geographic proximity, shared building typologies and aligned climate objectives create opportunities for cooperation beyond national boundaries.

The experience gathered through the GRF project suggests that scaling industrialised renovation depends on five core conditions:

- Stable and predictable policy frameworks
- Aggregated demand pipelines
- Regional production hubs
- Early integration of industrial actors in design processes
- Clear performance-oriented business models

Industrialised renovation is not simply a technical alternative to traditional refurbishment. It represents a structural shift in how deep renovation is conceived, organised and delivered.

By structuring information and clarifying market dynamics, the GRF solutions libraries aim to support this shift. They are not static catalogues but evolving tools, designed to accompany the progressive industrial transformation of the European renovation market.

The next step is not to multiply pilot projects, but to stabilise pipelines, strengthen ecosystems and enable replication at scale.