

NHMF Study Tour

Key Takeaways

Speaker(s):

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NHMF Study Tour – Why Berlin?

- Similar population and density (London 14,827ppsqm v Berlin 11,041ppsqm)
- Ageing population – Germany 44.6 years v UK 40.7 years
- Significant post-war housing
- Culture of renting, no stigma – predominantly apartments
- Market structure similar – outsourcing & insourcing solutions
- NHF equivalent is GdW
- 3,000 RPs in Germany – 6.4 million homes (municipal and public housing companies)

Berlin of the 20th Century

The 1950s - Reconstruction in East and West

HOWOGE



← East-Berlin
1951-53
Stalin-Allee

West-Berlin
1951-57
Inter-Bau



1961 Division of the city

Berlin of the 20th Century

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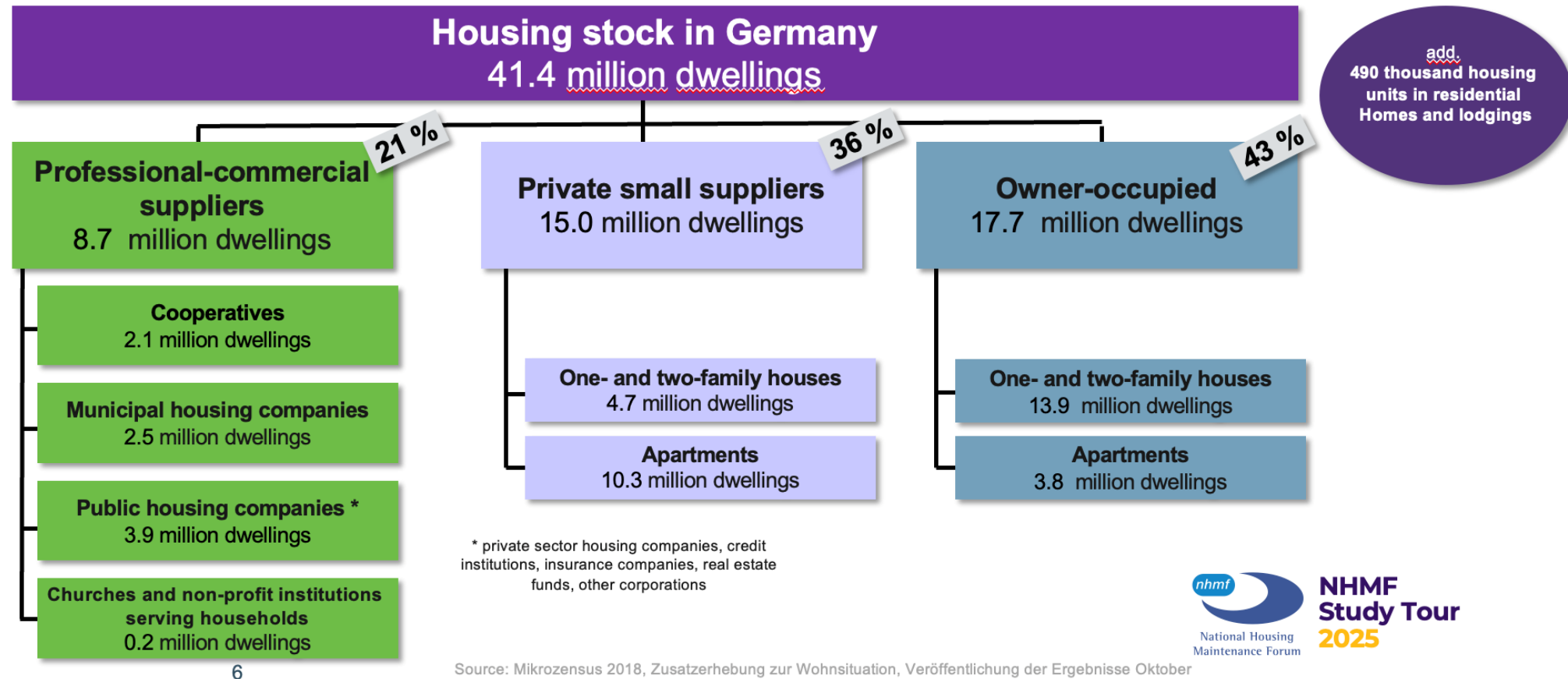
West-Berlin
1951-57
Inter-Bau



1961 Division of the city

Supply structure in building stock Germany

*Mikrozensus 2018



Source: Mikrozensus 2018, Zusatzerhebung zur Wohnsituation, Veröffentlichung der Ergebnisse Oktober 2019 sowie GdW-Jahresstatistik 2018

Public Housing in Berlin – key features

- Age of stock & apartment living – GDR ‘WBS-70’ blocks
- 57% of Germans rent – 23.7 million homes (80% in Berlin)
- Funding support for affordable rent
- 6 RPs in Berlin – 1 million tenants
- Howoge & Gewobag – 160,000 homes
- No HoS & RSH limited involvement

Challenges – sounds familiar?

- Rising construction inflation
- Rising financing costs (interest rates)
- Skills shortages combined with retiring workforce
- Lack of affordable homes – 260k built v 400k target in 2024 (Berlin 15k v 20k target)
- EU Climate targets – EU Energy Performance of Buildings Directive (EPBD)
- Policy tension – climate targets v affordability
- Rising repair costs
- Voids 1.5% - relet in days

German Service Providers

- B&O Service £150mpa, 2,000 employees – 10% NP
- Fragmented market – subcontract management
- 1.5 repairs/property – 8 jpppd (target)
- Tenant's repairs – 90% phone, 10% email
- PPP Model prevalent
- RP reliance on SP data via web portal
- Limited tenant involvement in the service



Innovation driven by IT and AI

- 100 in-house IT developers
- Call Centre – multi language (AI) – fault diagnosis – R1stT
- Single contract system – one version of the truth
- Productivity = cost = price (bo.om) – PPP then amended year 1
- Void 3D modelling, BofQ, quotation (magicplan)
- Tenant web portal – track repairs, history
- Property & repair data for client

Some observations

- UK greater IT investment in integration – is this improving the repairs service?
- Germany focused on IT investment that improves productivity, efficiency and margins
- UK providers have more sophisticated repairs management systems
- Germany has used digitisation in voids management
- Germany investing in AI – call handling, fault diagnosis, delivery times
- UK & Germany facing very similar challenges in social housing

Any questions?





Chartered
Institute of
Housing

July 2025
Dr Eve Blezard

HOUSING AS A PUBLIC GOOD

Housing Policy insights from Germany



Policy Context: Why Germany?



Strong Rental Model

The 'Basic Law'



Tenant rights and governance

Rights based policy



Decarbonisation

Länder influence



1974



Post War Foundations

The backdrop to Germanys housing policy



Plattenbau Legacy



18 hour build time



A nation of renters

Homes vs Assets

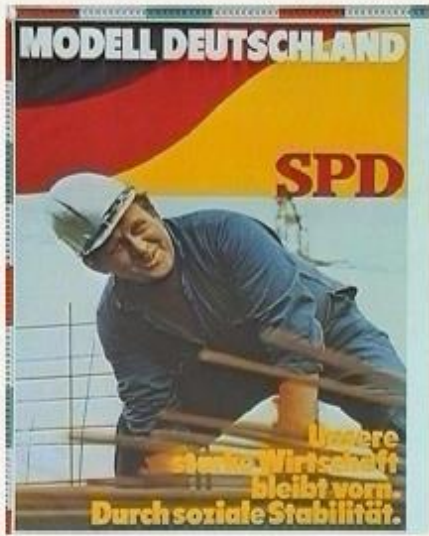
Cultural resistance to treating homes as speculative assets.

German Civil Code

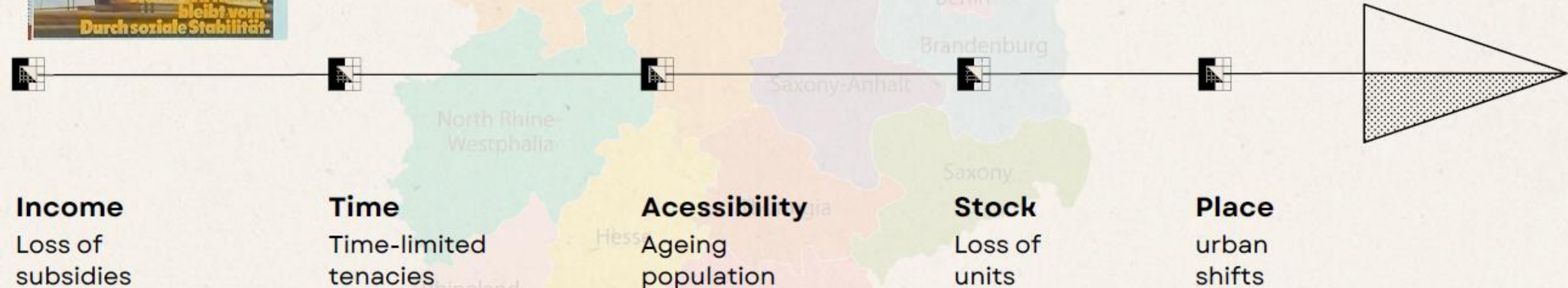
Tenancy law provides long-term security and strict rent controls.

Social Good

Large public providers ensure housing as a social good.



The end of 'Modell Deutschland'?

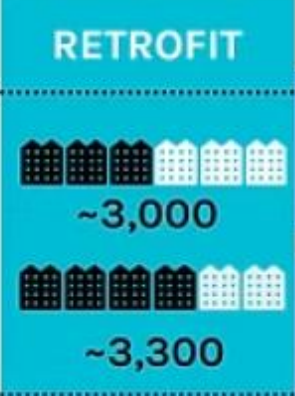


Article 14 of the Basic Law states that "property entails obligations. Its use shall also serve the public good"

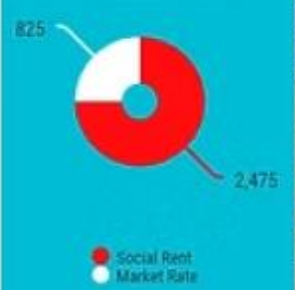
Renovation without renoviction

DEVELOPMENT APPROACH

HOUSING UNITS
BEFORE / AFTER
DEVELOPMENT



SOCIAL RENT UNITS
proportion of social housing (%)
vs total number of housing units
by end of development



Housing Density
number of dwellings by acres



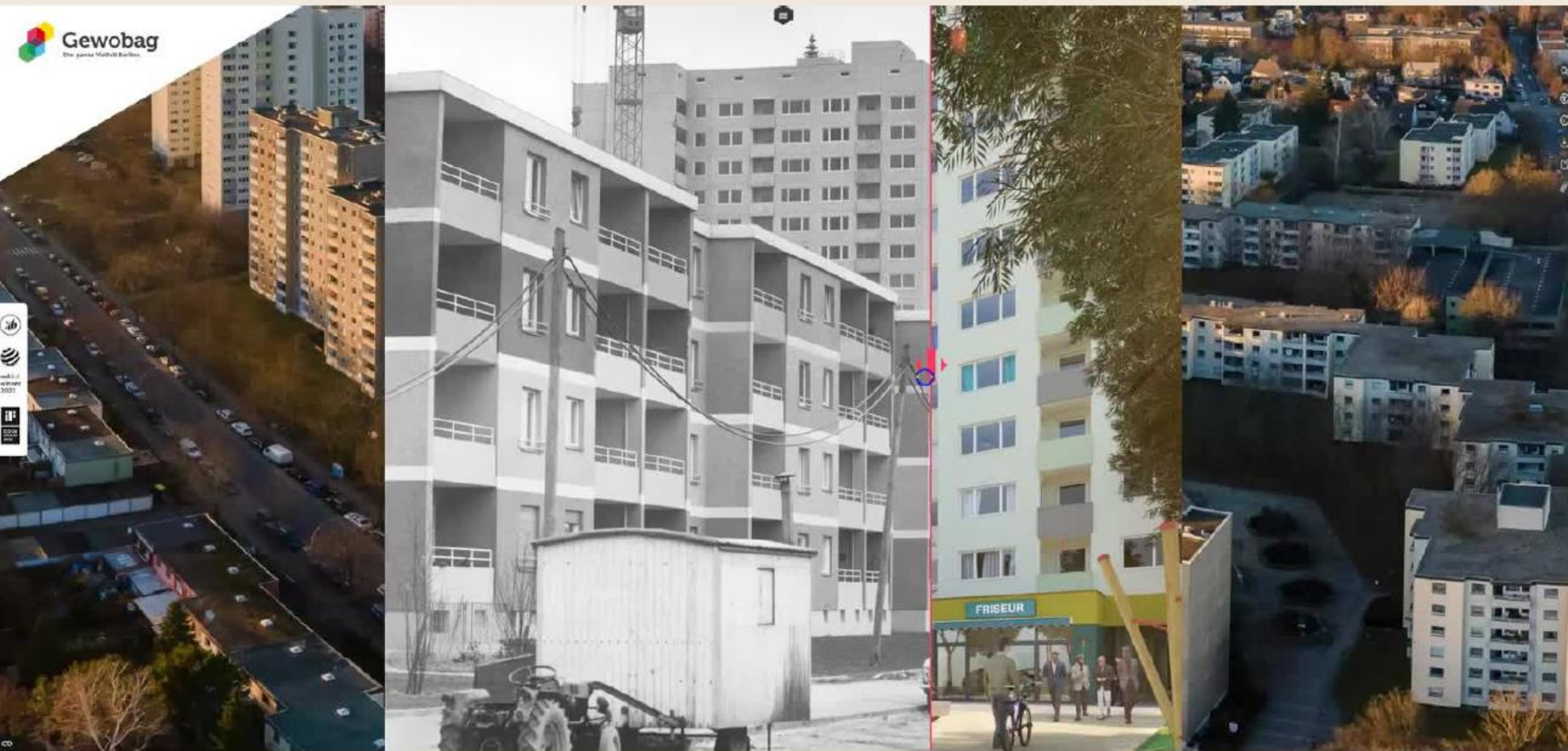
**Cost of
development**
demolition/rebuild vs retrofit

€ 300 Million
BUND, LAND, EU,
KFW



The green retrofit of a municipal housing estate in Drewitz

Buckower Höfe" residential complex



The entire residential complex in the Buckow district of Berlin will be modernized, redesigned, and expanded by 2028.

Social Market Economy



Gewobag
Die ganze Vielfalt Berlins.

“Affordable, attractive housing is a prerequisite for a vibrant, colorful metropolis.”

Links and Resources

Renovation without renoviction - The green retrofit of a municipal housing estate in Drewitz:

<https://www.susteus.com/gartenstadtdrewitz>

Strong tenant protections and subsidies support Germany's majority-renter housing market

<https://www.brookings.edu/articles/germany-rental-housing-markets/>

DDR Museum 'Living in the Platte:

<https://www.ddr-museum.de/en/ask-dr-wolle/living-platte>

The End of Modell Deutschland?:

<https://americangerman.institute/2025/02/the-end-of-modell-deutschland/>

Museum in der Kulturbrauerei - Housing in the GDR:

<https://audio.hdg.de/kulturbrauerei/en/kul-16>

Gewobag The "Buckower Höfe" residential complex:

<https://www.gewobag.de/bauen-in-berlin/bauprojekte/buckower-hoefe/>

The New Leipzig Charter:

https://www.bmi.bund.de/SharedDocs/downloads/EN/eu-presidency/gemeinsame-erklaerungen/new-leipzig-charta-2020.pdf?__blob=publicationFile&v=8

The Joy of Concrete: The unexpected story behind Berlin's divisive Plattenbau;

<https://www.the-berliner.com/berlin/plattenbau-architecture-social-housing-ddr-german-history/>

