

MAY 2026

## EUROPEAN CONSTRUCTION OBSERVATORY

# Policy Fact Sheet

## SPAIN

### PERTE for the industrialisation of housing

#### Building Block 1: Competitiveness



## Overview

<b>What</b>	A strategic initiative aimed to modernise Spain's housing construction sector through industrialised building methods and accelerate the supply of affordable housing
<b>Who</b>	Led by the Government of Spain and implemented by the Ministry of Housing and Urban Agenda (Ministerio de Vivienda y Agenda Urbana), in coordination with other ministries, and through public-private collaboration
<b>For whom</b>	Construction and manufacturing companies (notably SMEs), workers in the construction sector, public housing developers, and households
<b>When</b>	2025 – 2034
<b>How</b>	EUR 1.3 billion (EUR 1.0 billion from financing and EUR 0.3 billion from capitalisation) by the Instituto de Crédito Oficial (ICO)

### Innovation

### Transferability

## Summary

### Key Features

- **Deploys blended financial instruments** to de-risk investment and mobilise private capital
- Structures the initiative around **three objectives**: production capacity; efficiency and sustainability; training and talent
- Promotes an **open, collaborative, and digitally enabled industrialised construction model**
- Establishes **centralised governance** through interministerial coordination and a public-private partnership

### Strategic Goals

- **Increase housing production** to converge with European standards
- **Reduce construction times** by 20-60%
- **Improve** productivity, quality and environmental performance
- **Upgrade working conditions and attract talent**, including women and youth

### Broader Impact

- Boosts delivery of **affordable and sustainable housing**
- Enhances **competitiveness** by generating structural productivity gains in the construction sector
- Creates strong **multiplier effects** across the wider economy and related PERTEs
- Supports **regional recovery and resilience**, including DANA-affected areas

# Project Description

In response to housing supply constraints, low productivity, an ageing and shrinking workforce, and rising climate requirements, Spain has turned to industrialised construction as a key lever for transforming its housing sector. The **PERTE for the Industrialisation of Housing** (“PERTE de la industrialización de la vivienda”, hereinafter **PERTE**) mobilises industrial policy to scale housing delivery while improving quality, sustainability and labour conditions. Launched in 2025, it aims to address structural weaknesses in the construction sector via open industrialisation, digitalisation, and skills development. Its overarching goal is to build more, faster, and better housing that meets European standards.

PERTE was conceived against the backdrop of a persistent housing supply gap and long-standing structural weaknesses in Spain’s construction sector. Cumulative undersupply was estimated at over 600,000 dwellings between 2013 and 2023. In 2022, construction productivity was around 20% below the EU average, at approximately EUR 29 per hour, due to low firm turnover and limited investment per worker. Industrialised construction was also marginal at around 1% of housing output, compared to 20% in Germany and 50% in Sweden. These structural constraints have limited the sector’s capacity to respond to housing demand and climate requirements.

In response, PERTE aims to mobilise EUR 1.3 billion of public investment over ten years, with each euro expected to leverage EUR 1.4 in private investment - a combined multiplier effect of 2.4 across the economy. It targets 15,000 industrialised homes per year, rising to 20,000 by the end of the period. Construction times are expected to fall by 20-60%, depending on the level of industrialisation (Box 1). PERTE further aims to raise industrialised housing to around 10% of total production. Figure 1 shows PERTE’s four strategic objectives, expected to be operationalised via concrete axes and instruments (Figure 2).

Figure 1: PERTE’s strategic objectives

Capacity	Efficiency	Training & talent
<ul style="list-style-type: none"> <li>Scale industrial housing production</li> <li>De-risk investment with public finance</li> <li>Create stable demand to unlock scale</li> </ul>	<ul style="list-style-type: none"> <li>Cut construction times by 20-60%</li> <li>Improve quality and performance through off-site production</li> <li>Reduce carbon footprint and material waste</li> </ul>	<ul style="list-style-type: none"> <li>Upgrade skills across the value chain</li> <li>Attract young workers and women</li> <li>Professionalise installation and logistics roles</li> </ul>
Collaboration & standards (cross-cutting)		
<ul style="list-style-type: none"> <li>Shift to open, collaborative construction models</li> <li>Improve interoperability and system compatibility</li> <li>Strengthen coordination across fragmented actors</li> </ul>		

PERTE is owned by the Spanish government, implemented via an Interministerial Coordination Committee led by the Ministry of Housing and Urban Agenda (Figure 3). A public-private alliance of industry, SMEs, finance, public authorities and research institutes advises. Spain’s public development bank, the Instituto de Crédito Oficial (ICO), delivers PERTE’s financial instruments.

Figure 2: PERTE’s expected implementation axes and instruments




 <p><b>Objective 1: Capacity</b></p> <ul style="list-style-type: none"> <li>ICO long-term public loans (EUR 1.0 billion) and AXIS public equity (EUR 0.3 billion) for industrial plants and systems</li> <li>Zero-interest recovery loans (REINICIA+FAIIP DANA) for industrial projects in flood-affected areas</li> <li>Public procurement and housing finance (ICO) to scale</li> <li>Other: RRF, ENISA loans, AEI-CLUSTERS scheme</li> </ul>	1
 <p><b>Objective 2: Efficiency</b></p> <ul style="list-style-type: none"> <li>Shared digital platform with BIM data and system compatibility</li> <li>Component traceability tools to reduce manufacturer risk and aid financing</li> <li>Updated UNE national technical standards and procurement rules</li> </ul>	2
 <p><b>Objective 3: Training &amp; talent</b></p> <ul style="list-style-type: none"> <li>Joint training programmes with universities, vocational centres and industry</li> <li>Training subsidies and skills certificates, incl. on-the-job learning</li> <li>New professional profiles in installation, logistics and digital coordination</li> </ul>	3
 <p><b>Objective 4: Collaboration &amp; standards (cross-cutting)</b></p> <ul style="list-style-type: none"> <li>City of Industrialisation in Valencia as showcase and training hub</li> <li>Public and private pilot projects testing collaborative delivery (e.g. developers creating procurement models)</li> <li>Cluster partnerships and EU safeguards across all actions</li> </ul>	4

Figure 3: PERTE’s governance

<p><b>Programme Owner</b></p> <p>Government of Spain </p>	<p><b>Implementing Authority</b></p> <p>Ministry of Housing and Urban Agenda, via an Interministerial Coordination Committee</p>
<p><b>Advisory body</b></p> <p>Public-Private Alliance for the Industrialisation of Housing</p>	<p><b>Funder</b></p> <p>Instituto de Crédito Oficial </p>

Box 1: What is PERTE’s industrialised construction?

Industrialised construction under PERTE is based on collaboration across the construction value chain. It relies on advanced digitalisation to integrate design, production, assembly and management from early project stages. Construction shifts from site-based execution to coordinated off-site manufacturing and on-site assembly. Some key process features are:

- Off-site manufacturing of components and systems, with on-site assembly.
- Open and compatible construction systems, avoiding closed or proprietary solutions.
- Full digital integration (e.g. BIM) across design, production and construction phases.
- Early coordination between actors, including designers, manufacturers and builders.
- Standardised and repeatable processes, enabling scalability and replication.
- Factory-based production, complementing on-site works.

# Progress Overview and Future Trajectory

## Current status

Figure 4 summarises PERTE's key developments [since May 2025](#). This is when it [entered implementation](#) following formal approval by the Council of Ministers. At the same time, the Ministry of Housing and Urban Agenda confirmed that PERTE financing would be channelled through Spain's public development bank, the [ICO](#). This established the operational financing pathway for the programme.

Concurrently, the government designated [Valencia](#) (Port Logistics Zone, on land owned by the Public Land Business Entity, SEPES) as the planned location for the future City of Construction Industrialisation. With a planned surface area of 70,000 square kilometres, the site is intended to serve as both a showcase and a training hub. It aims to foster a business ecosystem focused on industrialised construction methods that can shorten delivery times and reduce labour requirements.

Its selection was not incidental. It was linked to the need for a rapid and scalable response following the late-2024 "DANA" floods in the Valencia region. While the location has been politically confirmed, no construction tenders have been issued and no implementation timeline has been published at present.

Figure 4: Timeline of PERTE



At the end of May 2025, a dedicated [PERTE Technical Office](#) was created within the Ministry of Housing and Urban Agenda. Its mandate covers coordination, monitoring, rollout of financial instruments, development of the collaborative digital platform and oversight of pilot projects. No public reporting outputs from this office have been published to date.

In June 2025, the [Interministerial Coordination Committee](#) for PERTE, comprising nine ministries, was formally constituted and began operating. At its core, it comprises three ministries: the Ministry of Housing and Urban Agenda, which serves as chair, together with the Ministry of Economy, Trade and Enterprise and the Ministry of Industry and Tourism as co-proponents. Beyond this core, the Committee brings together ministries covering finance, labour, education, science, social inclusion and digital transformation.

## Outcomes

At present, no formal monitoring framework, progress dashboard or evaluation plan has been published for PERTE. This limits visibility on sequencing, milestones and reporting.

There is also no official communication on when systematic monitoring of outputs or outcomes will begin. Therefore, the outcomes below draw on high-level sources, namely Ministry press releases, media reporting and stakeholder input.

First, a concrete demand-side measure emerged in June 2025, when the Ministry of Housing and Urban Agenda introduced [industrialisation criteria into public housing tenders](#) managed by SEPES. Up to 10% of the evaluation score is allocated to industrialisation, including impacts on execution time, innovation, and the use of experimental solutions. Applied to at least 1,664 homes tendered by June 2025, the measure aims to stimulate demand for industrialised construction and accelerate delivery of permanently affordable housing. Information on the [Public Sector Procurement Platform](#) on awarded contracts remains limited, with many procedures still at early stages.

Second, at a [coordination meeting](#) in October 2025, authorities reported qualitative progress on several PERTE components. These included preparatory steps for the [City of Construction Industrialisation in Valencia](#), initial work on adapting [UNE national standards](#) (supporting standardisation, traceability and quality of industrialised products), and development of the sector-wide digital platform.

Third, at a [public-private alliance meeting](#) in March 2026, authorities [confirmed](#) the launch of the [ICO Industrialised Construction Growth line](#). This is a financing mechanism designed to provide liquidity for off-site construction, particularly to cover working-capital needs. Authorities also announced the launch of the [digital platform](#). The platform aims to centralise information on support schemes, facilitate participation by companies and institutions, and promote collaboration across the industrialised construction value chain.

Fourth, in May 2026, the Ministry of Housing and Urban Agenda launched a [public consultation on new PERTE grants](#).

Overall, PERTE implementation has so far delivered a limited number of concrete instruments. Progress on governance, standardisation and digital infrastructure has remained largely procedural. This reflects the initiative's first year of implementation within a ten-year timeframe, during which [some](#) sector stakeholders have nonetheless noted [a gap between ambition and the pace of delivery](#).

## Next steps

In the near term, implementation is expected to focus on operationalising announced instruments. This includes publicising the ICO Industrialised Construction Growth line and the digital platform. Further progress is also expected on the City of Construction Industrialisation in Valencia, the adaptation of UNE national standards, and PERTE grants. Beyond this, PERTE's longer-term trajectory is expected to become clearer as implementation advances, with current information outlining the challenges addressed, instruments, and intended impacts.

## Challenges and Conclusions



### Challenges

A first key challenge is the [absence of a monitoring and reporting framework](#). No progress dashboard, evaluation plan or dated implementation roadmap has been published to date. This limits transparency on sequencing, milestones and outcomes. It also makes it difficult to assess progress beyond announcements and coordination meetings. At present, according to stakeholders, there is no official communication on whether and when systematic monitoring will begin.

Relatedly, PERTE faces a challenge of [slow delivery](#). Stakeholders report that several announcements, widely anticipated by the sector, have not yet translated into concrete, operational measures. While funds have been announced, no funding has been released to date. There is also pressure from the international community (e.g. [NATO's demands](#) to raise defence spending), which has led the government to redirect resources to other ministries, away from the Ministry of Housing and Urban Agenda (responsible for PERTE). Progress on the Valencia City, UNE national standards, the ICO Industrialised Construction Growth line, and the digital platform has also remained qualitative so far. No measurable outputs have been reported. This slows interoperability, traceability and access to finance, which are central to PERTE's operating model.

Finally, stakeholders note an [absence of an integrated urban strategy](#). While PERTE promotes industrialisation, it does not address where housing will ultimately be built. Industrialisation can speed up construction, but it does not create plots, approve planning or urbanise land. These functions remain with municipal urban planning, which continues to face capacity constraints (e.g. planning permits may take up to two years in some cities). Without better integration between PERTE and local land-use strategies, industrial capacity risks advancing faster than housing delivery on the ground.



### Conclusions

Overall, PERTE sets out an [ambitious and integrated framework](#) to address long-standing weaknesses in Spain's housing construction sector. It combines industrial policy, housing delivery, skills development and finance under a single strategic umbrella. It is aided by [centralised governance and significant public funding](#). Its focus on open, digitally enabled industrialised construction and demand-side levers (e.g. industrialisation criteria) reflects a clear response to housing, productivity, labour and climate challenges in Spain.

In terms of innovativeness, PERTE currently stands out more for its [scale, coordination and policy integration](#) than for the introduction of fundamentally new instruments.

Blended finance via the national development bank, the promotion of open and interoperable construction solutions (e.g. the shared digital platform), and the use of public procurement to stimulate demand represent a coherent but largely incremental evolution of existing approaches. Pilot elements, such as the City of Construction Industrialisation in Valencia and planned collaborative delivery projects, are present, but remain loosely specified and have yet to generate measurable outputs.

[On transferability, PERTE faces notable constraints](#). Its implementation relies on strong central coordination, a capable public development bank, sustained multi-ministerial cooperation and broad stakeholder buy-in. The absence of a formal monitoring framework and the slow operationalisation of key instruments add uncertainty. While several components could be adapted elsewhere, the programme's complexity and institutional specificity (e.g. its governance model) suggest that transferring PERTE in its entirety to other national contexts would require significant adjustment.



### Recommendations

A first recommendation is to [recalibrate PERTE's priorities towards delivery and transparency](#). This includes establishing a basic monitoring framework with a limited set of milestones, output indicators and reporting dates. A light-touch dashboard would improve visibility and credibility. Clear sequencing would also help align expectations across ministries, and importantly, industry and local authorities. Further, harmonising key construction terms, protocols and processes (e.g. BIM software) would reduce uncertainty and improve implementation efficiency.

Second, PERTE could [accelerate the operationalisation of announced instruments](#). Translating funding announcements into clearly defined programmes with eligibility rules, timelines and access points would help. The same applies to the digital platform and the adaptation of UNE standards, moving from qualitative to measurable progress. This would help build momentum and a credible expected impact.

Finally, as stakeholders note, [urban and land-use policy could be integrated](#) to a greater extent. Industrialisation alone cannot unlock housing delivery without viable plots and planning capacity. PERTE could, for example, incorporate mechanisms to activate public land at scale and support municipalities with technical expertise. It could also standardise planning instruments and promote replicable models for housing scheduling and procurement. Digitalisation could further aid these efforts. For this, PERTE would need to broaden its perspective.

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