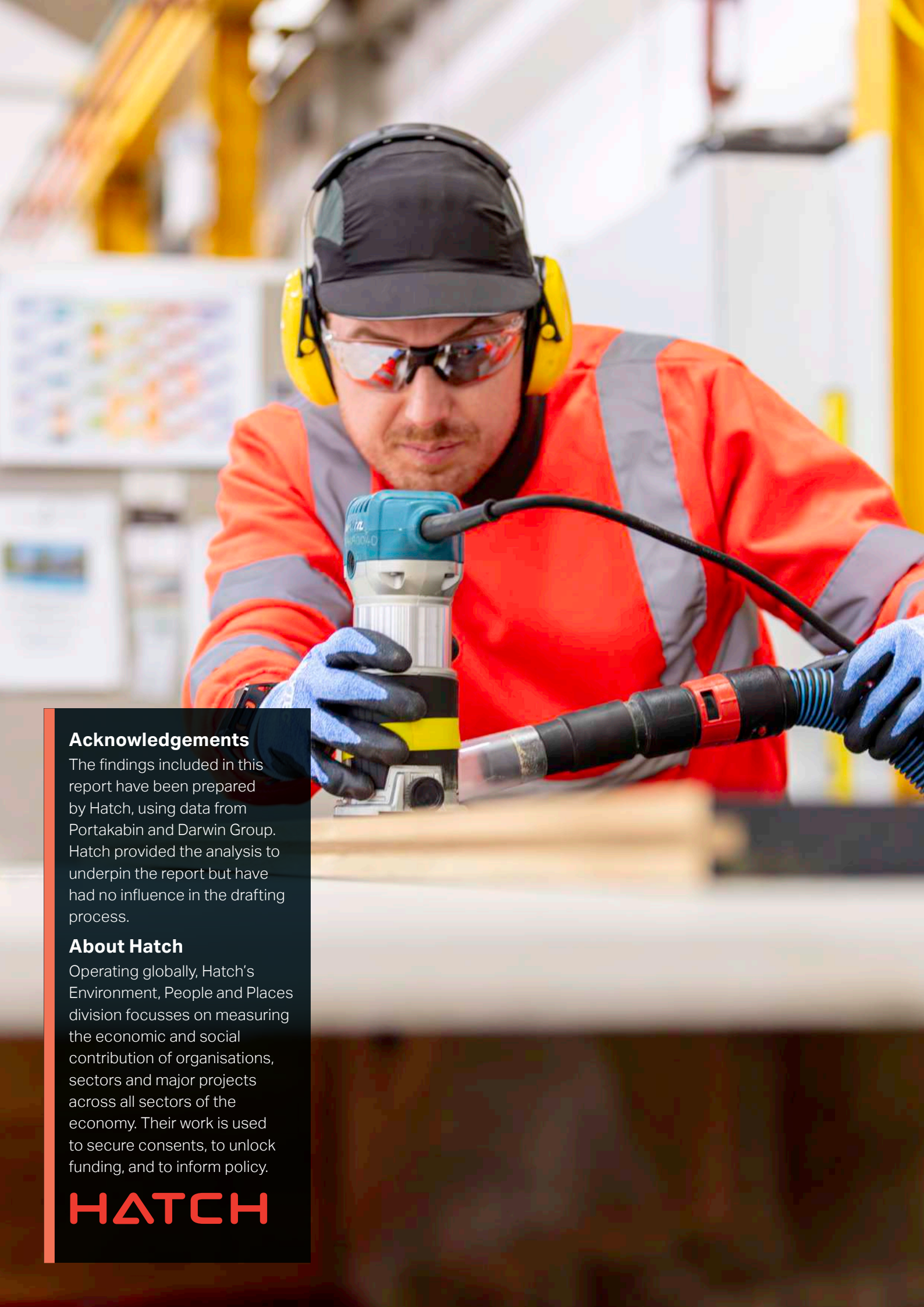
Portakabin®

Space to Deliver



Creating Space for National Growth

The Socio-economic impact of Portakabin



Acknowledgements

The findings included in this report have been prepared by Hatch, using data from Portakabin and Darwin Group. Hatch provided the analysis to underpin the report but have had no influence in the drafting process.

About Hatch

Operating globally, Hatch's Environment, People and Places division focusses on measuring the economic and social contribution of organisations, sectors and major projects across all sectors of the economy. Their work is used to secure consents, to unlock funding, and to inform policy.

HATCH

Foreword

Dan Ibbetson,
Chief Executive Officer,
Portakabin®

Portakabin is a British company with more than 60 years of innovation in three dimensional, volumetric modular construction.

The business began by supporting the construction industry with site offices and supplying temporary classrooms, quickly establishing a strong, highly recognisable brand and a reputation as the leader in modular building.

Over the decades, the company has strengthened its capability and leadership position in the modular buildings sector and sustained innovation has transformed the company's products and applications, the sectors it serves, and the commercial models available to customers. Today, the Portakabin brand is well established across both the UK and continental Europe and is widely regarded as a leader in modern methods of construction (MMC) using three dimensional, volumetric modular solutions.

- **Expanding our healthcare expertise:** In April 2023, the acquisition of Darwin Group brought nearly two decades of specialist modular healthcare experience, including the delivery of more than 69,000m² of clinical space and over 2,000 patient beds across the UK.
- **Securing long-term strategic investment:** In 2024, Antin Infrastructure Partners, a leading private infrastructure fund, joined as a long-term strategic partner, providing strong financial backing, enhanced access to capital markets and a stable platform for continued partnership with public and private sector clients.

Despite this long standing success, there remain misconceptions about what Portakabin does, especially in the context of UK public sector delivery. The company no longer simply provides temporary buildings. Instead, it delivers a service: creating high quality, purpose built space where and when it is needed, for exactly as long as it is needed.

This model reflects broader societal shifts. Across many parts of modern life – cars, films, smartphones, music – people increasingly value access over ownership, often through rental or subscription models. Users benefit fully from the asset without needing to own it permanently.

Public sector estates, however, have been slower to adopt such demand based approaches. The result is an ageing, inflexible infrastructure with limited capacity to respond to evolving needs. The Government's total maintenance backlog across public sector buildings has grown to almost £50 billion, with 56% coming from schools, hospitals and other NHS sites alone.[1]

How Portakabin can help

Modern, modular spaces directly address these challenges. Portakabin provides adaptable, high quality spaces that enable public service delivery and can be reconfigured or redeployed as needs change.

In the context of the UK's economic, social and environmental pressures, Portakabin® is positioned to act as a trusted delivery partner to Government. Its modular, On-Demand® service can support the UK's growth agenda and public sector ambitions by providing spaces that:

- can be delivered quickly and at scale;
- are aligned to the duration and nature of need;
- can be expanded, reduced or reconfigured as circumstances change;
- can be redeployed to serve entirely new purposes;
- support sustainable, circular economy principles; and
- can be financed flexibly, with hire based models suited to both revenue and capital budgets.

Throughout this report, this flexible, service led approach is referred to as the 'On-Demand' model.



Dan Ibbetson,
Chief Executive Officer,
Portakabin

Executive summary

After years of underinvestment in the UK's public infrastructure, demand for high-quality, rapidly deployable space across healthcare, education and housing is now at unprecedented levels.

Delivering the Government's growth ambitions, from boosting productivity and addressing regional inequality to strengthening public services and investing in skills, requires flexible, cost-effective infrastructure that can be delivered quickly and adapted as needs evolve.

On-Demand modular buildings, pioneered and industrialised by Portakabin, provide this capability. Flexible and sustainable space creation through modular solutions aligns directly with national priorities and with HM Treasury's core tests for success, including value for money, pace of delivery and risk reduction.

This approach offers a proven model for future-ready public services: infrastructure that can be deployed at speed, adapted over time, and redeployed as needs change. It also supports national and local economic growth by sustaining high-value employment and strengthening domestic supply chains.

While MMC is referenced positively in several cross departmental Government strategies, volumetric modular buildings are still too often viewed as a reactive or temporary measure, rather than as a core component of long term public sector estate planning. This perception limits the effectiveness of estate management and means the public sector misses out on the full benefits that Portakabin On-Demand modular buildings can deliver.

MMC is not a single method

A key issue is that MMC is frequently misunderstood as a singular construction approach. In reality, MMC encompasses a range of offsite and onsite techniques, including:

- **2D panelised systems:** walls, floors and roofs manufactured offsite and assembled onsite; often used as a permanent alternative to traditional construction.
- **3D volumetric modules:** entire building sections manufactured in factory controlled environments, transported to site and installed rapidly.
- **Hybrid systems:** solutions combining both panelised and volumetric components.

Recognising these distinct categories is critical, as each offers different advantages and is suited to different types of projects.

The strategic role of On-Demand modular buildings

Portakabin On-Demand modular buildings – based on 3D volumetric modules – provide capabilities that complement, rather than replace, permanent construction (whether traditional or MMC). When deployed alongside long life estate assets, they create a more strategic, flexible and cost effective approach to public sector estate development and management.

This combined model enables public bodies to:

- match space provision precisely to changing service needs;
- avoid overbuilding or carrying unused capacity;
- reduce whole life costs through adaptable, redeployable assets; and
- improve resilience by delivering additional space quickly and at scale when required.

This report presents the findings of a socio economic assessment commissioned by Portakabin and undertaken by Hatch to quantify the company's economic, social and environmental contribution to the UK.

The study evaluates the direct and indirect impact Portakabin has on national and regional growth, its role in delivering public infrastructure, and the wider value created through skills, innovation and sustainability.

National contribution

The assessment confirms that Portakabin is a major national contributor, combining strong industrial capability with measurable social value.

National contribution of Portakabin*

Economic impact



£775m

£775 million Gross Value Added (GVA) generated annually for the UK economy (including £210 million in Yorkshire), supporting over 7,400 jobs nationwide (including more than 2,000 in Yorkshire), where Portakabin remains one of the region's largest employers.



99%

A resilient domestic supply chain: 99% of the £343 million annual supply chain spend by UK business units remains within the UK, with more than a quarter directed to Yorkshire-based firms and almost 45% with SMEs.

Workforce investment



1,680

Directly employs 1,680 people (FTE) in the UK, with 795 roles based in Yorkshire and notable high retention rates, with an average employee tenure of 9.5 years.



83%

High productivity and strong wages: average productivity per employee is 83% above the national average, and salaries exceed the UK mean by almost one third.

Social and community impact



£2.8m

Significant social value investment: over 30 apprentices employed each year and has delivered £2.8 million in social value between 2020–2025.



£275k

Additional £275k of social value created each year through volunteering and charitable giving.

*Statistics from 2024

Executive summary
continued

Impact across key public sectors

These national contributions are reflected in work across the sectors most vital to public life.

Healthcare

Through its specialist healthcare subsidiary Darwin Group, the company supports NHS Trusts to deliver new wards, operating theatres, diagnostic centres and emergency care units that expand clinical capacity and improve patient pathways.

Since 2020, Darwin Group has delivered 34 healthcare projects, covering both clinical and non-clinical applications, providing approximately 52,800m^2 of healthcare space, of which 87% is clinical. Based on an estimation of 50 patients per year per m^2, this equates to approximately 2.5 million patient pathways per year.

Education

Since 2020, Portakabin has delivered modern, flexible teaching space for 41,000 pupils and SEND facilities for more than 5,000 pupils nationwide.

This includes ensuring continuity of education for over 11,500 children displaced by unsafe RAAC affected buildings, enabling schools to maintain face to face learning while longer-term estate renewal is progressed.

Transitional Housing

Portakabin has developed a new transitional housing model to support local authorities facing the human and financial pressures of the UK's temporary accommodation crisis.

These self contained, family-ready homes, deliverable in as little as twelve weeks, offer stability, privacy and dignity at significantly lower cost than current, often unsuitable temporary accommodation.

With national deployment, the model could support up to 10,000 people each year while permanent social and affordable housing is built.

The case for On-Demand modular buildings

These achievements demonstrate how On-Demand modular buildings can meet urgent needs, enhance public services and create lasting social value at pace and scale, while future proofing public infrastructure.

However, the full potential of On-Demand modular solutions remains underused. Policies, systems and guidance have not kept pace with the capabilities of modern modular construction, limiting public sector access to these solutions.



The Martin School, Leicester



Transitional House by Portakabin



James Paget University Hospital, Norfolk

Policy recommendations

Targeted actions for Government

Healthcare

1 Recognise and unlock the potential of On-Demand modular buildings by incentivising NHS providers to integrate them into long-term estate planning.

2 Encourage NHS providers to utilise hire-based procurement models to address short-term capacity issues and support waiting list reduction through rapid deployment of On-Demand modular clinical space without compromising patient care.

3 Publish national guidance and best practice examples on the use of hire based procurement models (suited to both revenue and capital budgets) for NHS estate development.

Education

1 Ensure that the full range of offsite and onsite MMC techniques – including On-Demand modular education spaces – are considered in both reactive and proactive (short, medium and long term) school estate strategies.

2 Provide clear guidance on the use of hire based procurement models (suited to both revenue and capital budgets) within the School Rebuilding Programme to enable local authorities and schools to integrate On-Demand modular spaces alongside traditional capital builds.

Transitional housing

1 Provide clear guidance to support on the use of hire based procurement models (suited to both revenue and capital budgets) to support the rapid deployment of modular transitional housing.

2 Review Local Housing Allowance rates to reflect the real cost of social housing and temporary accommodation.

3 Mandate the use of public, brownfield and grey belt land for modular transitional housing on fixed-term (5–10 year) leases.

4 Amend the Planning and Infrastructure Act to explicitly recognise On-Demand modular buildings as a strategic solution to temporary accommodation pressures.

Cross cutting

1 Promote On-Demand modular buildings across all public-sector infrastructure strategies.

2 Introduce ringfenced, flexible funding mechanisms within departmental budgets to enable local authorities to procure On-Demand modular buildings aligned with local need.

3 Simplify and modernise planning and regulatory processes through standardised national guidance, expanded permitted development rights and improved support for ‘meanwhile-use’ permissions to enable rapid deployment of On-Demand modular buildings without compromising on quality.

Portakabin exemplifies the productivity, sustainability and social value that modular spaces can deliver within a modern UK economy.

As an innovation driven, financially strong British manufacturer, it is ready to partner with Government to provide faster, fairer and more flexible public infrastructure.

By embedding On-Demand modular buildings within national infrastructure policy, the UK can deliver spaces that are fit for purpose, fiscally responsible and future ready, creating space to care, learn and belong.

Economic contribution of Portakabin

A strong, British provider of critical infrastructure

For more than 60 years, Portakabin has delivered critical infrastructure across public and private sectors with pace, scale and consistent quality.

Founded and headquartered in York, the company is a proud British business and one of the UK's leading providers of modular space.

High quality, adaptable modular buildings provide innovative solutions to urgent public sector challenges – from delivering rapid teaching space for schools affected by RAAC to providing permanent grade clinical environments that help the NHS reduce patient waiting lists. Every module is designed for flexibility: buildings can be expanded, reconfigured, removed or repurposed to match evolving local needs.

With pressure increasing across public services, the UK requires a more modern approach to infrastructure. The flexible financing models offered by Portakabin, combined with rapidly deployable and adaptable modular spaces, provide exactly that: future ready solutions delivered at pace, aligned to the nature and duration of need, and capable of evolving as services change. This approach delivers sustainable, cost effective outcomes.

Committed to sustainable growth in Yorkshire and across the UK*

Economic impact

£775m

Portakabin generates £775 million of Gross Value Added (GVA) for the UK each year:

£240m

£240 million direct GVA – economic value created **directly through operations.**

£280m

£280 million indirect GVA – value generated through **supply chain spending.**

£255m

£255 million induced GVA – value created **through household spending by employees** in directly and indirectly supported jobs.

£210m

In Yorkshire alone, the total GVA contribution is **£210 million, including £115 million direct GVA.**

Supply chain contribution*

Portakabin supports extensive supply chains across the UK:

99%

99% of total spend remained within the UK.

£343m

In 2024, business units spent £343 million with suppliers.

1/4

More than a quarter went to suppliers based in Yorkshire.

4,245

This spending **generates significant multiplier effects throughout the supply chain,** supporting 4,245 indirect jobs across the UK, including 885 in Yorkshire.

*2024 figures

A national footprint with local reach

Portakabin operates one of the UK's largest modular fleets, with over 100,000 units hired by more than 4,000 customers across the UK and Europe. A network of service centres ensures close proximity to customers and rapid deployment for planned or urgent requirements.

Four manufacturing sites – two in the UK, one in France and one in Germany – ensure high-quality, consistent production and minimise on-site construction activity.

Supporting jobs, skills and employment

Skills development and apprenticeships are central to the Government's ambition to drive growth, enhance productivity and prepare the workforce for future industries.

The Government's Modern Industrial Strategy identified MMC as a key growth area and has supported the sector by investing £625 million in training to develop advanced manufacturing and green construction skills.[2]

MMC, which includes the modular spaces created by Portakabin, directly aligns with this agenda, creating high-value, future-focused employment and supporting a modern economy.

Employment Footprint

Portakabin is one of Yorkshire's largest employers, supporting:

- 1,680 direct FTE jobs, including around 800 in Yorkshire, primarily at the York site. This workforce is comparable in scale to employment across major sectors in York, such as construction, manufacturing, IT and finance (each around 3,700–3,850 FTEs).

Pay, productivity and progression

- Employees earn 28% above the UK average salary, providing greater disposable income and supporting local economies.
- Average salaries are 32% above the Yorkshire regional average.
- Each employee generates £140,000 per year for the UK economy, 83% higher than the national productivity average.
- Average employee tenure is 9.5 years, compared with 3.7 years nationally, 5.3 years in manufacturing and 4.4 years in construction.

Apprenticeships and training

- Portakabin recruits more than 30 apprentices annually, offering opportunities from Level 2 to degree apprenticeships across construction trades such as plumbing, joinery and electrical, as well as roles in product design, engineering, marketing, finance and project management. Apprenticeship intake has doubled in recent years, reflecting growing demand and interest in modern construction careers.
- 98% of apprentices are offered permanent roles on completion and have an average tenure of 17 years.
- Apprenticeships delivered between 2020–2025 generated £463,000 in annual social value, totalling £2.8 million over six years, with a further £275k per year created through volunteering and charitable giving.

Career framework, learning and development

- The Portakabin Career Framework provides a clear and consistent structure to support employee development and help individuals take control of their careers. By outlining role structures, organisational positioning and the experience, responsibilities and expectations involved, it makes career progression more transparent and easier to navigate.
- Employee growth and development is further supported through individual development plans, leadership development programmes, our "In Your Shoes" job-shadowing programme and the Portakabin learning platform, which offers access to a wide range of digital learning content.

Supporting jobs across the country

Employees directly employed by Portakabin and those in its supply chain spend earnings in local and national economies. This spending drives demand for goods and services, supporting further value creation and employment. In total, induced effects are estimated to support an additional 1,520 FTE jobs across the UK, including 410 in Yorkshire.

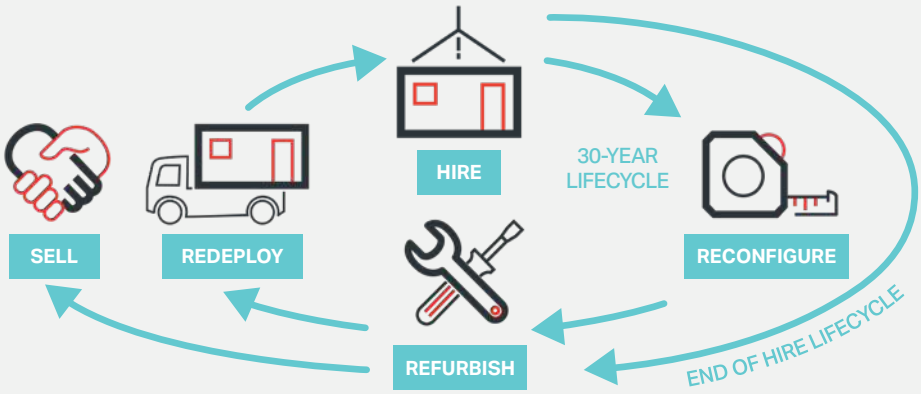
Economic contribution of Portakabin
continued

Committed to supporting sustainability and reducing environmental impact

The UK Government has placed green growth at the centre of its economic strategy. This includes a target to reach net zero emissions by 2050, alongside sector-specific targets, such as the commitment to make NHS England the first net zero health system by 2045.[3,4] With the built environment contributing around 25% of UK greenhouse gas emissions, decarbonising construction is essential to achieving national targets.[5]

Environmental, social and governance (ESG) principles sit at the heart of the Portakabin approach to sustainable growth. The company's sustainability strategy spans product innovation, climate action, community engagement, employment practices, health and safety, ethical sourcing and governance – ensuring responsible operations and contributing to a more sustainable built environment.

The hire based On-Demand model is intrinsically designed around circular economy principles, enabling buildings to be reused, adapted and redeployed across different sectors and geographies. All of our modular buildings can be reconfigured while on hire (expanded, contracted or adapted as circumstances change), providing future-proofed spaces that can evolve based on need. At the end of one application, buildings are refurbished and redeployed to provide a different space solution to a new customer. On average, our modular buildings are redeployed on up to 15 different applications during their hire lifecycle and our single modular buildings on up to 27 different applications – each application providing a space solution exactly aligned to the duration of need. After they reach the end of their hire lifecycle, our modular buildings can be refurbished and sold, providing the opportunity to extend their lifecycle and provide many additional years of use. This approach maximises asset lifespan, reduces waste and lowers environmental impact while providing customers with flexible, high quality space precisely when and where it is needed.





Brentford Football Club, Robert Rowan Performance Centre, Brentford

Case Study: Brentford Football Club – circularity in practice

The Robert Rowan Performance Centre at Brentford Football Club comprises 51 Portakabin modular units, the oldest from 1995, with modules previously used across sectors including retail, rail, healthcare, higher education and COVID 19 vaccination delivery.

This exemplifies how On-Demand modular buildings can be repurposed multiple times to extend asset life and reduce environmental impact.

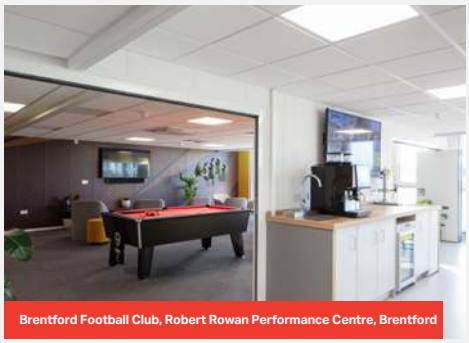
In addition, Portakabin continues to make strong progress against reducing its environmental impact:

- Despite a 22% increase in revenue between 2023 and 2024, Portakabin reduced direct carbon emissions by 2.2%.
- The company's UK waste decreased from 7,393 tonnes in 2023 to 6,493 tonnes in 2024, with only 1.3% sent to landfill, down from 1.7% the previous year. Notably, the company's main site in York sends zero waste to landfill.
- **The company has an ongoing building innovation partnership with University College London (UCL),** which includes:
  - **Collaborating with UCL's Circular Economy Lab** on research to advance sustainable construction, including efforts to reduce embodied carbon. This work explores innovations such as using reclaimed timber from

demolition sites for structural applications, diverting high-value materials from waste and reducing the environmental impact of new builds.

- **Providing modular buildings free of charge to UCL's Controlled Active Ventilation Environment (CAVE)** to support research into healthier, more energy-efficient ventilation systems. This collaboration is helping to identify how public buildings, such as schools and hospitals, can minimise the impacts of poor air quality on health while reducing energy demand, ensuring safer, more comfortable environments for the people who learn, work and receive care within them.

- **A full range of low and zero-carbon (LZC) technologies** including solar heating systems, passive ventilation, air-source heat pumps, and green roofs are available to all customers. Standard product specifications also incorporate energy-efficient LED lighting and wireless heating controls to further reduce energy use and operational carbon.



Brentford Football Club, Robert Rowan Performance Centre, Brentford

Case Study: Power Hub

Portakabin has developed and trialled an innovative renewable-energy solution, the Power Hub, designed to provide easy-to-install, easy-to-remove sustainable power for modular buildings.

Mounted within a purpose-built frame on the roof, the unit integrates photovoltaic (PV) panels and wind turbines to maximise on-site energy generation.

The 4.88 kW hybrid system is estimated to produce 4,440 kWh per year (based on operating hours of 7am–5pm) and has the potential to offset up to 40% of the annual energy demand of a standard site accommodation office. This offers customers meaningful carbon reductions alongside significant operational cost savings.

Portakabin is committed to sustainable growth, contributing substantial economic value, supporting UK supply chains, creating high-quality jobs and apprenticeships, and driving the transition to a more sustainable and productive economy. By embedding modern, circular, On-Demand modular buildings within national infrastructure and public service delivery, the UK can unlock a more flexible, resilient and future ready built environment.

Case Study: Combining Ethical Sourcing with Health & Safety

Hand injuries previously accounted for over 30% of Portakabin workplace accidents.

Working with UK based hand protection specialist and leading provider of cut resistant work gloves, Traffi, Portakabin introduced more protective and durable gloves, selected through extensive employee trials. Traffi's gloves prioritise responsible materials, include the first industrial glove with an Environmental Product Declaration, and are the first to be certified carbon neutral. In the first six months, they led to a 56% reduction in hand and finger injuries and avoided approximately 2.4 tonnes of CO_2 equivalents.

This initiative has strengthened the company's safety culture, improved wellbeing and reduced environmental impact, demonstrating the value of close supply chain partnerships.



Portakabin manufacturing employee with protective gloves

Sectoral Impact of Portakabin

A modern approach to infrastructure reform

The UK's planning and infrastructure landscape is undergoing significant reform and, after years of underinvestment, the Government now recognises the need for a more modern and agile approach to public infrastructure delivery.

In the recent past, lengthy approval processes and complex regulatory frameworks have constrained economic growth, contributing to delays, escalating project costs and reduced efficiency across public services. The Government's 10 Year Infrastructure Strategy sets out a long-term plan to address these challenges, including £725 billion committed to economic and social infrastructure. Importantly, the strategy unifies social infrastructure such as schools, hospitals and housing, with traditional economic infrastructure under one integrated framework.

These reforms are welcome, but structural and policy gaps remain. Achieving the scale of infrastructure required to meet national ambitions for growth will depend on greater agility, innovation and speed across the construction sector. Without modernisation, the full potential of On-Demand modular buildings to deliver flexible, high-quality infrastructure at pace will not be realised.



Asquith Primary School, Leeds

The Portakabin service model can play a central role in this transition, enabling rapid deployment, reducing disruption to essential services and giving local providers in health, education and housing the flexibility they require.

Portakabin as a delivery partner

Portakabin has a long-standing record of supporting the UK public sector to overcome infrastructure challenges. For more than 60 years, the company has delivered high quality modular spaces that enable schools, hospitals and local authorities to meet both immediate requirements and long term strategic needs.

On-Demand modular buildings can be deployed at pace to maintain continuity of essential services, such as temporary wards during NHS winter surges or decant classrooms during school refurbishments. Modular buildings can also evolve over time adapting in line with population, service and technological change. As a result, this model is equally suited to longer-term infrastructure where flexibility and scalability are essential.

As the Government modernises the planning system and implements a long-term infrastructure strategy, On-Demand modular buildings should form a core part of the solution. Portakabin brings proven modular delivery expertise, a strong UK manufacturing base and deep experience working with public-sector partners.

Barriers to success

Despite the clear potential of On-Demand modular buildings – and the suitability of Portakabin as a delivery partner – several barriers continue to limit adoption across the public sector.

1. Lack of recognition in cross-departmental policy

The 10 Year Infrastructure Strategy acknowledges the value of MMC and modular buildings within the defence sector but fails to reference their role across other areas of critical need. If the strategy is to deliver modern, agile public services, it must explicitly support flexible modular building solutions.

2. Capital investment reforms do not go far enough

While the Government has made positive commitments on capital funding, local providers still lack the flexibility and guidance needed to invest in infrastructure aligned with the nature and duration of need.

The absence of clear mechanisms for hire based models (suited to both revenue and capital budgets) limits the ability to procure rapid, innovative solutions such as On-Demand modular buildings. Without further reform, infrastructure delivery risks further delays, leaving no viable interim options.

3. Planning and regulatory complexity continues to slow deployment

Planning delays of 12 to 14 weeks often erase the time savings provided by On-Demand modular buildings. In addition, regulations frequently treat temporary modular buildings the same as permanent structures, introducing unnecessary complexity, cost and delay.

While Portakabin fully meets all regulatory and building standards, the growing complexity of requirements risks limiting the swift deployment of temporary and flexible modular buildings where they are urgently needed.

The solutions

To unlock the full potential of modern, flexible and rapid infrastructure delivery, the Government should:

1. Promote On-Demand modular buildings across all public-sector infrastructure strategies

Establish clear national frameworks and ensure capital and revenue budgets allow for the adoption of modular solutions in healthcare, education, transitional housing, defence and other critical sectors.

2. Introduce ringfenced and flexible funding mechanisms

Departmental budgets should include protected, adaptable funding streams enabling local authorities and public bodies to procure On-Demand modular space quickly and in line with local need.

3. Simplify and modernise planning and regulatory processes

Streamline planning permissions and building regulations to enable appropriate use of modular buildings, particularly for transitional and flexible structures providing a solution for short to medium-term public sector infrastructure and service delivery challenges.

Health sector impact



The health service is currently at a crossroads

The NHS is operating under unsustainable pressure, with both short and long-term challenges acting as barriers to efficient and optimal healthcare delivery across the country.

The challenges faced by the NHS include immediate issues such as waiting lists, which are having a detrimental impact on all areas of the care pathway, from primary care and mental health services to A&E and acute care. These issues are compounded by long-standing trends that continue to stifle the NHS, including a lack of digital integration and outdated infrastructure.

Physical infrastructure is critical to ensure the NHS can continue to operate, but buildings across the NHS are outdated and operating as a hindrance to care. The size of the maintenance backlog has been driven by decades of underinvestment, resulting in a neglected and crumbling NHS estate that is impacting care outcomes.



7.41m

As of August 2025, the elective care waiting list stood at **7.41 million cases, reflecting 6.26 million patients waiting for treatment.**[6]



5,400

Between 2019 and 2024, the NHS faced an average of **5,400 clinical service incidents each year** due to infrastructure failures, eroding valuable clinical time and disrupting the care of 137,000 patients.[8]



£13.8bn

In 2023/24, **the maintenance backlog across the NHS stood at £13.8bn,** more than double in real terms what it was in 2015/16[7]



600 days

Over 600 days are lost each year to **urgent repair incidents** such as water leaks and power failures.[9]

Maintenance issues across the NHS continue to undermine Government ambitions to improve patient outcomes right across the NHS and they require wide-ranging reforms.

Government reform is ambitious, but long-term. NHS estates pressures demand immediate solutions

Recognition of the need to reform is shared across Government. Despite extreme fiscal pressure across departments, the Government has chosen to prioritise additional funding towards health and social care through increases to the revenue budget for day-to-day spending and an injection of capital funding for long-term investments.

The Government's 10-Year Health Plan, published in July 2025, is wide-ranging and ambitious. It aims to address long-standing inadequacies across the NHS by prioritising prevention, digitisation and community care. It also has specific commitments on the NHS estate, which if implemented, could turn around decades of neglect.

Central to the Government's long-term plans for NHS infrastructure is the New Hospitals Programme, which has been reaffirmed as a flagship policy intended to deliver a modern hospital estate across England.

Health sector impact
continued

However, despite the ambition and investment, Government commitments in this area will take years to manifest. For example, adjusted timeframes for the New Hospitals Programme mean that some projects are now not expected to start construction until 2037.[10] In the meantime, NHS infrastructure remains outdated, and solutions largely hinge on the delivery of permanent new buildings.

With pressures on the estate already acute, there is an urgent need for interim, innovative solutions that can expand capacity and ease system pressures while long-term programmes take shape. With an urgent need for interim solutions in mind, the Government's ambitions for reform provide an important framework. The Government has been clear in their direction to NHS providers: driving efficiency and productivity is key to meeting ambitions for reform.[11] Estates and infrastructure are a critical component of this agenda, underpinning the ability of the health service to modernise and deliver care more effectively.

On-Demand modular buildings should play a central role in this transformation. They align closely with the Government's reform priorities by delivering additional capacity at speed, supporting modern models of healthcare, and enabling providers to use their resources more efficiently.

Modular spaces offer essential flexibility, creating safe decant areas during refurbishment or repair works and providing scalable clinical environments that can be rapidly deployed in response to surges in demand. As the specialist healthcare subsidiary of Portakabin, Darwin Group is ready to ensure that estates and infrastructure become enablers of progress rather than barriers.

Darwin Group can act as a key solution to estates and infrastructure challenges spanning the entire health system

Darwin Group can deliver high-quality clinical and non-clinical On-Demand modular healthcare facilities, giving patients and staff the spaces they need at the right time, aligned to their required duration. This ensures that NHS Trusts can leverage On-Demand modular facilities to address pain points in their system, such as addressing bottlenecks, improving patient pathways or reducing waiting lists.

Since 2020, Darwin Group has delivered 34 healthcare projects, covering both clinical and non-clinical applications, providing approximately 52,800m^2 of healthcare space, of which 87% is clinical. Based on an estimation of 50 patients per year per m^2, this equates to approximately 2.5 million patient pathways per year.

A core advantage of On-Demand modular space is its versatility across the entire patient journey from admission through to discharge. Darwin Group can provide tailored facilities to support each stage of care, including ambulance handover units, same-day emergency care units, twin operating theatres, general ward buildings and patient discharge lounges. Together, these facilities strengthen resilience and improve efficiency across urgent, acute and elective care.

Beyond clinical functionality, modular buildings offer significant advantages in delivery and performance. Offsite construction in factory controlled settings enables faster build times and consistent quality; a 24 bed ward can be completed in as little as 95 working days. The company's nationwide depot network and the UK's largest fleet of modular healthcare buildings support rapid deployment, even in urgent situations.

Modular space is scalable and adaptable. Facilities can be expanded, contracted or reconfigured as patient needs change and system priorities evolve, and flexible procurement options allow providers to manage capital and revenue budgets more effectively. This supports a transition from short term crisis management to strategic, long term estate planning.

Darwin Group offers a full turnkey service, including design, engineering, construction and commissioning delivered in house, helping NHS providers to build future ready estates that meet today's demands and tomorrow's ambitions.



James Paget University Hospital, Norfolk - Official Opening

Case study:
James Paget University Hospitals NHS Foundation Trust

James Paget University Hospitals NHS Trust needed to expand its urgent and emergency care services to reduce unnecessary admissions into its A&E department, support winter surges and enhance clinical flow through the creation of a same-day emergency care (SDEC) unit.

The Trust required a fast and flexible solution to relocate its orthopaedic outpatient department, freeing up the optimal location next to the Emergency Department, improving access and streamlining patient flow.

The Trust partnered with Darwin Group to deliver a new On-Demand facility, which includes nine consultation and examination rooms, three plaster bays, an orthotics treatment room, a resus bay, and accessible toilets. Supporting spaces such as reception, staff areas, offices, storage and an IT hub ensures that it functions as a complete clinical environment.

This hireable, modular building was constructed in just16 weeks, with 75% of the above-ground build completed offsite at the Darwin Group York facility. Its rapid delivery freed up critical hospital space for the new SDEC unit while providing a modern, well-equipped environment for orthopaedic care.

The project demonstrated how On-Demand healthcare facilities can give NHS Trusts the adaptability to respond quickly to service pressures, balancing short-term needs with long-term estate planning.

Barriers to success

Several barriers are preventing the health service from fully benefitting from modular solutions

1. Inflexible and outdated approaches to planning and estates models

Despite the ambitions of the NHS 10-Year Health Plan, estates and infrastructure planning is not set up to embrace On-Demand modular buildings that can support the Government's aims on digitisation, prevention and community-based care.

NHS England has provided comprehensive guidance to integrated care systems (ICS) to build respective 10-year infrastructure strategies; however, it did not include specific guidance or recommendations to embrace MMC (including On-Demand modular buildings).[12] This approach to estates and infrastructure planning risks ingraining an outdated and inflexible NHS estate into the future adding to building maintenance backlog issues.

2. NHS Trusts and Integrated Care Systems (ICS) face uncertainty around the appropriate use of hire-based and revenue-funded procurement models, creating hesitation and inconsistency in uptake

Current procurement frameworks are often too slow and inflexible to address urgent needs, such as seasonal surges, estate failures, or expanding diagnostic capacity.

While fast-track routes such as direct award procurement do exist, inconsistent use and a lack of national guidance on hire or revenue-funded models create uncertainty and discourage innovation. Clear guidance and flexible funding mechanisms would allow Trusts to deploy modular solutions quickly, efficiently, and strategically.

Health sector impact
continued

The solution

The Government should:

1. Recognise and unlock the potential of On-Demand modular buildings

Align the 10-Year Infrastructure Strategy with the 10-Year Health Plan to unlock the potential of On-Demand permanent grade modular spaces. Incentivise NHS trusts to integrate modular facilities into long-term estate planning as a tool to support flexible, rapid-delivery infrastructure, recognising that immediate capacity does not always require permanent ownership.

2. Encourage the deployment of On-Demand modular buildings to address short-term capacity issues and reduce waiting lists

Encourage NHS trusts to utilise hire-based procurement models (suited to both revenue and capital budgets) as practical solutions to address short-term capacity gaps without compromising patient care. Trusts must be given the confidence to implement modular spaces to bridge gaps in capacity, reducing delays while longer-term estate planning progresses.

3. Clarify guidance on the use of hire-based procurement models

Publish clear national guidance, and best practice examples, on hire-based procurement models (utilising both revenue and capital budgets) for NHS estate development. This should give local providers confidence to embed modular facilities into infrastructure strategies as practical, safe, and flexible alternatives to traditional capital builds. While fast-track frameworks exist, internal NHS approval processes often slow deployment.
Clear guidance and incentives should reduce these bottlenecks, allowing modular facilities to be rapidly deployed for urgent needs such as seasonal surges, elective backlogs, or estate failures.


Watford Hospital, Watford


Warwick University, Warwick


North Middlesex Hospital, Enfield

Education sector impact



Education sector impact
continued

The UK education estate is under acute strain

Decades of underinvestment in the school estate has left thousands of pupils learning in outdated, unsafe and poor-quality facilities, with the RAAC crisis exposing just how deep the problem runs.

Alongside these building safety issues, the education system is grappling with shifting demographics that are reshaping demand for school places. Some regions face sustained increases in pupil numbers driven by population growth, migration and new housing developments, while others experience fluctuating enrolment patterns that demand more flexible and adaptable infrastructure. The proportion of pupils requiring inclusive, specialist provision for SEND is also steadily rising, placing additional pressure on already stretched resources and facilities.

For Government and local authorities, these pressures are converging against a backdrop of tight budgets and rising costs. Capital funding is constrained, maintenance backlogs are rising, and construction costs continue to climb, putting investment under pressure. Removing RAAC alone will cost hundreds of millions, but this urgent work has to be balanced with modernising schools to keep pace with new technology and new models of learning. The longer these projects are delayed, the higher the costs and the greater the risk to pupils.

Recognising the scale of the challenge, the Government has made a series of ambitious infrastructure commitments aimed at transforming the condition and capacity of schools across the country. Through the 10-Year Infrastructure Strategy and the 2025 Comprehensive Spending Review, the Government has pledged to increase the School Rebuilding Programme budget by nearly £20 billion, to modernise schools and colleges through £38 billion of investment and to provide £4.7 billion in additional funding by 2029 for broader school improvement, including SEND reform.[17,18]



237

RAAC has now been identified in 237 schools and colleges across England, yet almost 90 per cent of those affected are still awaiting remediation.[13]



1.5m

1.5 million children in England are estimated to be studying in unfit school buildings.[14]



£13.8bn

The **school building maintenance backlog** currently stands at £13.8 billion.[15]



24,000

Around 24,000 school buildings are beyond their estimated initial design life.[16]

Despite this strong intent, progress on delivery has been slow. Government remains significantly behind its target of completing 50 school refurbishments per year. Many schools continue to operate in substandard conditions, without access to the high-quality learning environments they urgently need.

Portakabin is uniquely positioned to help address these urgent challenges, providing solutions designed to support schools through both planned transformation and emergency response. Combined with flexible procurement and financing options, including hire and purchase models, this enables schools to use their revenue and capital budgets more effectively. The adaptable and future proofed nature of modular teaching environments allows the Department for Education, schools and local authorities to respond to shifting student demographics and curriculum requirements by adapting existing space or redeploying buildings to serve a completely new purpose.[19]



Somers Park Primary School, Worcestershire

Helping ensure that every child in the UK has access to a safe, modern and inspiring space to learn, modular spaces offer a range of benefits

Portakabin operates the largest fleet of modular education buildings in the UK, supporting day to day learning and longer term estate planning. These include standard classrooms as well as specialist facilities such as science laboratories, IT suites, performing arts studios, purpose built SEND spaces, kitchens, dining areas and administrative blocks.

Between 2020 and 2025, Portakabin has delivered modern, flexible teaching space for more than 41,000 pupils in mainstream education and over 5,000 SEND pupils. For schools and local authorities planning for growth, solutions can also deliver full site expansions, providing permanent or relocatable infrastructure that adapts as demand changes.

Modular learning spaces are equally suited to urgent requirements. Emergency and decant classrooms can be deployed rapidly to maintain continuity of learning during disruption caused by fire, flooding or structural issues such as RAAC. As of 2025, Portakabin has enabled 20 schools to respond to RAAC related challenges, supporting uninterrupted education for more than 11,500 affected pupils.

Modular spaces provide safe, comfortable and high performing learning environments for students and staff alike. Working closely with schools and local authorities, Portakabin ensures that every project delivers functional space and facilities that enhance the learning experience and meet the highest standards of quality and compliance.

The deployment of On-Demand modular buildings alongside permanent construction (traditional or MMC) presents a more strategic and cost-effective approach to education estate development and management. This combined model enables education providers to:

- match space provision precisely to changing service needs;
- avoid overbuilding or carrying unused capacity;
- reduce whole life costs through adaptable, redeployable assets; and
- improve resilience by delivering additional space quickly and at scale when required.

Education sector impact
continued



The Bridge Easton School, Norwich

Case Study: The Bridge Easton School

Norfolk County Council identified a significant need for an additional special educational needs and disabilities (SEND) school in Easton, near Norwich.

The objective was to create a modern, purpose-built school that would cater for the growing demand for SEND services in the area, specifically for children aged 4-19 with complex learning and cognitive needs, including those with autism spectrum disorder (ASD). The Bridge Easton School project was awarded to Portakabin as part of the DfE's Modern Methods of Construction (MMC1) framework, with funding secured through a successful bid to the Government's free school programme.

Precision-engineered at the Portakabin York manufacturing facility, the building was created using modules to form the main school blocks, alongside 8 hybrid sports hall modules.

The school features dedicated spaces for special educational needs, including sensory rooms, a medical treatment room and a specialist treatment unit for children with autism spectrum disorder. The design also incorporates a forest school area, outdoor play areas, a garden for engagement and sports pitches to provide both educational and recreational spaces.

Now serving 170 students, the school was completed on schedule, opening its doors within 52 weeks from the start of construction. The project has been praised by the school's headteacher, Heidi Philpott, for its attention to detail in design and construction, which has made the students feel "very at home" in their new surroundings. The Bridge Easton School has proven to be an essential asset for the local community, providing much needed SEND education facilities that support a wide range of learning and developmental needs.

Barriers to success

Despite its clear benefits, several barriers are preventing the education sector from accessing the full benefit of modular solutions

1. Sub-optimal positioning of modular buildings in long-term estate planning

While MMC is encouraged through some cross-departmental Government strategies, within the education sector modular buildings are too often treated as a reactive, temporary solution rather than a central component of long-term estate strategy. As a result, education sector estate management is often inefficient and misses out on the range of potential benefits On-Demand modular buildings can bring.

2. Procurement frameworks do not clearly recognise the benefits of revenue-funded and hire-based procurement models

There is a lack of clear national guidance on how schools and local authorities can make best use of hire-based and revenue-funded models to access On-Demand modular education spaces.

The solution

The Government should:

1. Ensure that the benefits of MMC techniques, including On-Demand spaces, are considered across school estate planning

Ensure that the benefits of the full range of offsite and onsite MMC techniques (including On-Demand modular education spaces) are considered in both reactive and proactive school estates and infrastructure strategies. This should include planning for short-term flexibility, medium-term capacity planning and long-term resilience.

2. Provide clear guidance on the use of hire-based and revenue funded models

Under the School Rebuilding Programme, issue clear guidance on how hire-based and revenue-funded solutions can be used alongside capital investment. This will give local authorities and schools the confidence to integrate On-Demand modular education spaces alongside traditional, capital-funded permanent builds where they offer the best value and fastest response.



The Bridge Easton School, Norwich

Transitional Housing sector impact



The UK has an urgent need for temporary accommodation

Across England, a chronic shortage of social housing has pushed thousands into inadequate temporary accommodation such as hotels, B&Bs, and Houses in Multiple Occupation (HMO). This growing crisis is having a significant impact on people across the country.

Accommodation represents far more than just somewhere to live, and for families without access to social housing and people experiencing homelessness, reliance on temporary accommodation can have serious health consequences.

Between October 2023 and September 2024, 80 children died while living in temporary accommodation, accounting for 3% of the total number of child deaths during this period.[24] Additionally, communal or overcrowded accommodation is consistently associated with elevated rates of respiratory illnesses, tuberculosis, skin infections, and gastrointestinal diseases.[25]

Human impact



1.29m

As of March 2023, around **1.29 million households were registered on local authority waiting lists for social homes,** nearly triple the numbers a decade earlier.[20]



>172k

132,410 households across England – which includes **172,420 children – were living in temporary accommodation** in June 2025.[21]



35%

People living in temporary accommodation has increased in London every year since 2011, with **210,000 Londoners living in temporary accommodation.** This figure includes over 100,000 children, representing a 35% increase since 2021.[22]



47%

In England, **47% of children living in temporary accommodation have been forced to move schools**, with one in five having to move multiple times.[23]

Economic impact



£2.8bn

In 2024/25, local authorities in England and Wales collectively **spent over £2.8 billion on temporary accommodation,** representing a 25% increase on the previous year.[29]



£50-90

The **cost of housing one individual in temporary accommodation can be £50-90 per night,** especially in B&Bs and hostels, which make up one-third of council spend on temporary accommodation in 2024/25.[30]



£5m

In **London alone, boroughs collectively spent £5 million per day** on temporary accommodation in 2024/25.[31]

Transitional Housing sector impact
continued

Unstable accommodation also impacts mental health and education. Temporary housing often lacks stability, privacy, or necessary facilities and exposes residents to stigma, isolation, and trauma. Research in London found that living in unsafe, poorly maintained conditions directly increased anxiety, depression, and feelings of powerlessness.[26]

Children in overcrowded homes face disrupted schooling, often facing long commutes, with no quiet place to study at home, both of which can impact academic attainment.[27]

Employment prospects are also undermined, with adults in temporary accommodation frequently lacking a stable address, facing stigma, and being confined to insecure, low paid or zero hour jobs that don't allow them to cover basic housing costs.[28]

The national crisis in temporary accommodation also places a considerable financial burden on the Government, and consequently on local councils.

The Government has set out long-term plans to support people living in unsuitable temporary accommodation including their social and affordable housing strategy and the National Plan to End Homelessness. Together these set out a vision to deliver more and better homes for those in need, and end the reliance on B&B-type accommodation and hotels. However, while the Government outlines some immediate actions, including a much-needed funding injection for local councils, the chronic shortage of social housing and affordable homes means these changes will take time to be realised.

A proven model with scale, quality and impact

To meet the immediate demand for affordable, high-quality temporary accommodation, Portakabin has developed a scalable model for modular transitional housing capable of providing transitional homes for up to 10,000 people each year.

The modular transitional housing model offers local authorities a practical bridge while a sustainable stock of social and affordable housing is being built, providing cost-effective, high-quality, rapidly deployable and relocatable homes that provide people with a genuine stepping stone out of unsuitable accommodation and into stability without burdening local authorities with a long-term capital commitment or associated maintenance costs.

Self contained modular apartments are designed by Portakabin specifically for residential use, offering privacy, dignity and comfort

With the capacity to deliver 30 apartments, providing more than 50 bedrooms, in as little as 12 weeks from order, Portakabin can enable councils to respond rapidly where the need is greatest. Their flexible design means these modular transitional homes can be adapted or relocated over time, ensuring maximum long term value for local authorities.

These transitional homes can transform the human experience of temporary accommodation. They provide stability of location, enabling children to attend school consistently and parents to access work or training without disruption.

As fully self contained apartments, they offer families the dignity of their own front door, private bathrooms, cooking facilities and separate living spaces. This stability can support independence, strengthen community connections, improve wellbeing, and deliver measurable social benefits for individuals, families and the public services that support them.

Equally important, Portakabin offers a revenue based rental model, which provides five to ten year contracts to align provision with the nature and duration of need. High quality, low maintenance construction reduces ongoing costs, while predictable contract structures relieves councils and housing associations of the administrative burden of sourcing and managing temporary accommodation. This efficiency allows local authorities to focus more effectively on long term housing strategies and support services.

Barriers to success

Despite its clear benefits for both local authorities and homeless families, several barriers are preventing local authorities from utilising modular transitional housing solutions

1. Restrictive planning frameworks that slow deployment

Local planning rules lack the flexibility required to accelerate the delivery of modular transitional housing, even when proposed on public brownfield or grey belt land. While the Government's planning and infrastructure reforms signal an intention to streamline processes and address structural barriers to development, they offer no modular-specific pathways, guidance, or incentives. In the absence of a national framework for modular transitional housing, local authorities must navigate inconsistent local policies that delay delivery, deter investment, and prevent modular transitional housing from being deployed at the pace required to address the temporary accommodation crisis.

2. Inflexible funding and procurement frameworks misaligned with transitional housing delivery

Local authorities face difficulties accessing funding for non-permanent housing options. Existing capital investment models favour permanent housing and rarely accommodate revenue-based models that can be used for modular transitional housing. Without reform, procurement systems will continue to favour poor-quality, expensive short-term temporary accommodation sourced via easily accessible on-line booking platforms, despite modular transitional housing offering a higher-quality and more cost-effective alternative.

3. Lack of coordinated national policy to drive adoption

There is currently no mandated or prioritised use of modular transitional housing within core housing frameworks or funding streams. Without clear Government-backed guidance, incentives, or adoption targets, local authorities receive limited support to integrate modular transitional housing into their long-term housing strategies. The absence of policy direction has left modular transitional housing underused.





Visualisations of modular transitional housing from Portakabin

Transitional Housing sector impact
continued

The solution

The Government should:

1. Provide clear guidance to support hire-based procurement models for modular transitional housing.

Publish clear national guidance to support hire-based procurement models suited to both revenue and capital budgets. This should give local authorities the confidence to use modular transitional homes to respond quickly to urgent housing need, without requiring long-term capital commitment or permanent land allocation.

2. Review Local Housing Allowance rates to reflect the true cost of temporary and social housing.

Undertake a review of Local Housing Allowance (LHA) rates and the approach to annual uplifts to ensure they more accurately reflect the real costs faced by local authorities in providing social housing and temporary accommodation. Aligning LHA with market and delivery costs would reduce financial pressure on councils and improve sustainability.

3. Mandate the use of public, brownfield and grey belt land for modular transitional housing.

Introduce a requirement for public sector bodies to prioritise suitable public, brownfield and grey belt land for modular transitional housing to accelerate delivery, make better use of underutilised land, and leverage solutions that can adapt to changing local need.

4. Amend the Planning and Infrastructure Act

Planning regulations should introduce flexible mechanisms – including 'meanwhile-use' permissions and/or permitted development rights – to support rapid deployment of high-quality modular transitional housing. Planning policy should also explicitly recognise MMC (including volumetric modular buildings) as a method to address short to medium-term public sector infrastructure and service delivery challenges.

Conclusion and call to action

Portakabin is a solutions driven partner to Government, with more than six decades of experience delivering high quality, rapidly deployable modular spaces where and when they are needed most.

Across healthcare, education, housing and beyond, Portakabin modular spaces can help the public sector tackle long standing challenges around capacity, quality and affordability. From enabling NHS Trusts to expand clinical space and improve patient flow, to providing schools with safe, modern classrooms during the RAAC crisis, to developing a transitional housing model that brings stability and dignity to families in temporary accommodation, Portakabin demonstrates the scale, innovation and reliability that the UK's infrastructure system urgently requires.

The full potential of On-Demand modular buildings remains constrained by structural and policy barriers. Across sectors, procurement processes and complex planning systems limit public bodies' ability to benefit from the speed, flexibility and long term value that modular On-Demand solutions can provide. Without reform, these barriers will continue to hinder innovation and delay the delivery of vital public infrastructure.

The UK's infrastructure challenges demand speed, creativity and collaboration.

Portakabin stands ready to work with Government and partners to deliver the next generation of public infrastructure faster, fairer and more sustainably. By embedding On-Demand modular buildings as a strategic enabler of growth and public service renewal, the Government can unlock the full economic, social and environmental potential of this sector, creating spaces to learn, to care and to belong.



Hull Royal Infirmary, Hull

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