

THE NORDIC RESIDENTIAL ENTRY MODERNIZATION REPORT

2026

An analysis of trends, challenges and best practices in residential entry systems.

INDUSTRY INSIGHT REPORT



CONTENTS

Research Methodology	3-4
Forward	5
Executive Summary	6-7
Chapter 1: Why Are Housing Associations Modernizing Their Entry Systems Now?	8-10
Chapter 2: The Hidden Cost of Complexity	11-15
Chapter 3: The Modern Resident	16-19
Chapter 4: The Operational Building	20-26
Chapter 5: Choosing the Right Modernization Strategy	27-30
Chapter 6: The Residential Modernization Playbook	31-34
Chapter 7: The Next Generation of Residential Buildings	35-38
About Defigo	39

Research Methodology

About this Report

The Nordic Residential Entry Modernization Report is an independent industry analysis developed by Defigo to examine the long-term trends shaping residential building modernization across the Nordic region. Rather than focusing on individual products or technologies, the report explores the operational, demographic, economic and project-related factors influencing how residential buildings are modernized today and how they are likely to evolve in the years ahead. The objective is to provide building owners, developers, consultants, project managers, installers and property professionals with a practical framework for making better modernization decisions.

Research Approach

The report combines quantitative market research with qualitative industry insight. The analysis is based on four complementary sources of information:

1. Official Nordic Statistics

Housing, construction and demographic data have been collected from the national statistical agencies of Sweden, Norway, Denmark and Finland. These sources provide consistent, independently verified information regarding: Residential building stock, housing construction, building age, population and demographic trends.

Where appropriate, country-level data has been aggregated to provide a Nordic perspective while preserving national differences where they materially influence market conditions.

2. Public Sector and Institutional Research

The report draws upon publications and datasets from Nordic and European institutions, including research relating to: Residential modernization, building lifecycle management, urbanization, labor market development, sustainability and digitalization of the built environment.

These sources provide broader context beyond individual markets and help identify structural trends affecting residential buildings across the region.

3. Industry Experience

The report also reflects practical observations from residential modernization projects across the Nordic market. These observations are informed by collaboration with: Residential property owners, Housing associations, municipal housing companies, property managers, project managers, developers, consultants and certified installation partners.

The operational insights presented throughout the report are intended to complement publicly available research by highlighting common project characteristics observed in practice.

4. Strategic Analysis

Rather than evaluating individual products, suppliers or technologies, the report applies a strategic perspective to residential modernization. The analysis focuses on recurring themes that consistently influence project outcomes, including: project complexity, resident experience, operational efficiency, lifecycle value, installation methodology, adaptability and long-term building performance.

Frameworks presented throughout the report are intended to support discussion and decision-making. They should be viewed as practical planning tools rather than prescriptive methodologies.

Scope

The report focuses on multi-dwelling residential buildings across Sweden, Norway, Denmark and Finland. Primary building categories include:

- Housing associations and cooperatives
- Municipal housing
- Private residential property owners
- Student housing
- Multifamily residential developments
- Residential rehabilitation projects
- New residential construction

Although market conditions differ between countries, the report emphasizes common structural trends that increasingly influence residential modernization throughout the Nordic region.

A Note on Interpretation

Construction markets, regulations and technologies continue to evolve. Statistics presented in this report represent the most recent publicly available information at the time of publication. Where exact national methodologies differ, comparisons should be interpreted as directional rather than absolute.

The conclusions presented in this report are based on the combined assessment of quantitative research, publicly available evidence and practical industry experience. The purpose of this report is not to predict the future of residential buildings with certainty. Its purpose is to provide a practical decision-making framework that helps organizations plan modernization projects with greater confidence, lower complexity and stronger long-term outcomes.

FOREWORD

Residential buildings are entering a new era. For decades, the entrance to a residential building has been overlooked. Visitors arrive, residents answer and the door opens.

When the system eventually reaches the end of its service life, it is replaced.

For many housing associations, this process has remained largely unchanged for more than thirty years. Yet almost every other aspect of residential property management has evolved.

These days, property managers often operate from cloud-based platforms, while residents communicate through smartphones rather than fixed telephones. Building maintenance has become increasingly predictive rather than reactive, and energy systems continuously optimize themselves.

Buildings as a whole have become more connected, data-driven and digitally managed. The entrance, meanwhile, has often remained isolated from this transformation. But that is beginning to change.

Across the Nordic region, existing residential buildings are becoming increasingly valuable strategic assets as new construction work slows. Housing associations are expected to improve operational efficiency while maintaining resident satisfaction.

Labor shortages continue to place pressure on installation capacity, making project efficiency more important than ever. At the same time, residents increasingly expect digital services to extend into the places they live.

These developments represent a structural shift in how residential infrastructure is evaluated.

This report argues that residential entry systems should no longer be viewed solely as equipment requiring periodic replacement. They should be considered part of the long-term operational infrastructure of the building.

This distinction is subtle, but important. Replacing equipment is a purchasing decision. Modernizing infrastructure is an investment decision.

The difference influences procurement criteria, project planning, lifecycle cost, resident experience and operational efficiency.

Importantly, this report is not intended to recommend a particular product or technology. Nor is it intended to suggest that every residential building requires immediate modernization.

Many existing systems continue to operate reliably and will remain suitable for years to come. Instead, our objective is to provide housing associations, property owners, project managers, consultants and installation partners with a structured framework for understanding how residential entry systems are evolving—and how those changes may influence future investment decisions.

Throughout the report we introduce a concept we call **Residential Entry Modernization**.

We define it as: The strategic process of improving how residents, visitors, service providers and property managers interact with residential buildings by modernizing entry infrastructure in ways that improve resident experience, reduce operational complexity and strengthen long-term asset value. Whether organizations choose to modernize today, five years from now or as part of a future renovation program, the underlying market forces described in this report are likely to influence those decisions.

Our ambition is simple. To contribute to a more informed conversation about the future of residential buildings in the Nordic region.

EXECUTIVE SUMMARY

For much of the past three decades, modernization of residential entry systems has followed a predictable pattern. An existing system reaches the end of its useful life, maintenance costs increase, replacement parts become difficult to obtain, and then a modernization project is initiated.

This reactive approach has served the market well. However, the conditions surrounding residential buildings are changing. Rather than being driven solely by equipment failure, modernization is increasingly influenced by wider operational, economic and demographic trends.

This report identifies five structural forces that are reshaping how housing associations evaluate residential entry infrastructure.

1. Existing buildings have become increasingly important strategic assets.

Across the Nordic region, new residential construction has slowed following higher financing costs and broader economic uncertainty. As a result, housing associations are placing greater emphasis on extending the performance, efficiency and value of existing buildings rather than relying solely on new developments.

Infrastructure investments are increasingly evaluated through a long-term asset management perspective rather than immediate replacement needs.

2. Resident expectations continue to evolve.

Residents increasingly expect digital services to be available throughout everyday life, in areas such as banking, communication, transport, retail and healthcare.

These expectations increasingly influence perceptions of residential living.

The entrance is becoming part of that broader resident experience rather than remaining an isolated technical function.

3. Installation efficiency has become an economic consideration.

Across the construction and installation sectors, labor availability continues to place pressure on project planning.

Modernization is therefore influenced not only by equipment costs, but also by technician availability, resident coordination, project duration and installation complexity. Reducing project friction is becoming increasingly valuable.

4. Property operations are becoming increasingly digital.

Residential property management has evolved significantly over the past decade with cloud-based administration, digital maintenance, resident portals, remote management and data-driven planning.

Entry infrastructure is increasingly evaluated within this wider operational environment.

5. Modernization is becoming proactive.

Leading housing associations increasingly modernize infrastructure before critical failure occurs.

The objective is no longer simply replacing aging equipment. It is reducing future operational risk while improving long-term building performance.

The Central Question

These developments lead to a broader strategic question.

Rather than asking: "Which intercom should we buy?", Housing associations increasingly benefit from asking: "What role should the entrance play in the long-term operation of our building?"

This report explores that question through operational, financial and resident perspectives.

What This Report Is

This publication is intended to support:

- Housing Associations
- Property owners
- Municipal housing companies
- Student housing operators
- Property managers
- rehabilitation project managers
- New Construction Project Managers
- Consultants
- Installation Partners

The report combines publicly available market research with practical observations from residential modernization projects across the Nordic region.

Its purpose is not to promote a specific technology. Its purpose is to provide decision makers with a structured framework for evaluating one increasingly important aspect of residential infrastructure.

Why Are Housing Associations Modernizing Their Entry Systems Now?

Executive Summary

Walk into a residential building constructed twenty-five years ago and you'll see that many of the building's original systems have already been modernized:

- Heating systems have been optimized.
- Lighting has become intelligent.
- Energy monitoring has become digital.
- EV charging infrastructure has been introduced.
- Property management increasingly takes place through cloud-based software.
- Resident communication has moved from noticeboards to mobile applications.

Yet in many buildings, the entrance continues to operate much as it did when the building was first completed.

The question is no longer whether the system works, the question is whether it supports the way the building operates today.

Existing Buildings Have Become More Valuable

One of the most important changes affecting residential modernization has little to do with technology, but rather the buildings themselves.

Across the Nordic region, the pace of new residential construction has slowed in recent years as financing costs, inflation and market uncertainty have increased.

At the same time, long-term housing demand remains significant, shifting greater attention toward maintaining and improving the existing housing stock rather than relying solely on new developments. This trend is reflected in analyses from organizations including the OECD and national housing authorities.

This changes investment behavior.

When existing buildings become more valuable strategic assets, infrastructure decisions receive greater scrutiny.

Rather than replacing individual systems as they fail, housing associations increasingly evaluate how modernization projects contribute to:

- operational efficiency
- resident satisfaction
- maintenance planning
- long-term asset value
- future adaptability

Modernization becomes part of asset management rather than reactive maintenance.

Executive Insight

Infrastructure rarely becomes obsolete because it stops functioning. It becomes obsolete because the environment around it changes.

Residents have changed

Twenty years ago, technology was limited. Today, technology is a fundamental part of most people's daily lives. People now routinely:

- unlock vehicles using smartphones
- receive parcel notifications instantly
- verify identities digitally
- communicate through video
- manage finances through mobile apps
- work remotely
- access services from anywhere

These experiences influence expectations, even when entering their own building. This does not mean every resident actively demands a new intercom.

It means expectations for convenience, communication and accessibility have evolved. The entrance increasingly forms part of the overall residential experience.

Executive Insight

Residents rarely compare their building with another building. They compare it with every digital experience they have throughout the day.

Modernization Is No Longer Triggered Solely by Failure

Historically, modernization projects followed equipment failure. Increasingly, they are triggered by opportunity.

Examples include:

- major facade renovations
- accessibility improvements
- energy renovation programs
- entrance refurbishments
- security upgrades
- digitalization initiatives
- resident satisfaction programs

In these situations, housing associations have an opportunity to evaluate the entrance within the broader context of the building rather than as an isolated technical system. This often leads to different decision criteria.

Instead of asking: "Which system most closely resembles what we have today?",

Decision makers increasingly ask:

"Which solution best supports where this building is heading over the next twenty years?"

The Real Cost of Modernization

For many years, procurement discussions centered primarily on hardware. With questions such as: How much does the equipment cost? How many indoor stations are required? What is the cost per apartment?

While these remain important questions, they represent only part of the total investment. Increasingly, project success depends on factors such as:

- installation time
- resident coordination
- access to occupied apartments
- project scheduling
- contractor availability
- disruption to residents
- future maintenance requirements

These factors frequently influence the total project cost as much as—if not more than—the equipment itself. This observation leads to one of the central conclusions of this report.

The cost of modernization is no longer determined by the hardware. It is determined by the complexity of the project.

This principle will be explored throughout the remaining chapters.

Key Takeaways

This chapter establishes four observations that frame the remainder of the report.

1. Residential buildings continue to evolve through digitalization and modernization, while many entry systems remain based on legacy project models.
2. Existing residential buildings are becoming increasingly important long-term assets, placing greater emphasis on modernization strategies.
3. Resident expectations are shaped by everyday digital experiences rather than by historical limitations of building technology.
4. The success of a modernization project is increasingly determined by project complexity—not simply hardware selection.

Looking Ahead

If project complexity increasingly determines the success of modernization initiatives, a logical question follows: What actually creates complexity in a residential entry modernization project? Understanding that question requires looking beyond the technology itself and examining the hidden costs embedded in traditional project models.

That is the focus of Chapter 2 – The Hidden Cost of Complexity.