Home reimagined   by Atkins

Unlocking Wales' social housing challenge

Connecting home and opportunity

How planning and building the right homes in the right place connects people to opportunity and builds strong communities across Wales.

Who is EDAROTH?

The answer is in our name.

We believe that **Everybody Deserves A Roof Over Their Head** and everybody should have a place they are proud to call home. A place that is safe, secure and truly affordable.

EDAROTH offers a new way to tackle the social and affordable housing challenge.

As a subsidiary of Atkins, the global design, engineering and project management consultancy, we have the capability to combine end-to-end development expertise and design excellence with off-site manufacturing techniques.

Our aim is to deliver sustainable homes that enhance communities and improve lives.

Contents

Foreword

Across Wales and indeed the UK, we are facing a growing challenge to deliver the housing that people need as demand continues to outstrip supply.

Mark Powell
MANAGING DIRECTOR
EDAROTH

Affordability remains a key factor for low to median-income households, with home ownership becoming unattainable due to inflated house prices and a lack of homes available at a social rent tenure.

As I am writing this foreword, we are still in the midst of the Covid-19 emergency, the social and economic effects of which we are yet to fully understand. This may further exacerbate the need for social housing, as increasing numbers of households struggle to cope with the financial consequences of the virus.

While this will continue to be an evolving issue across Wales, **the growing demand for truly affordable and social housing brings with it the need for Government and local authorities to accelerate the delivery of new homes,** returning to their traditional role as builder and housing providers, to meet the emerging challenges this crisis presents.

The Welsh Government has delivered an ambitious strategy and vision for social housing. Rooted in the Well-Being Future Generations Act (Wales) 2015, the new 'National Development Framework' promises a long-term commitment to sustainable and responsible housing development. I also welcome the Welsh Government's clear support for modern methods of construction, recognising the potential it has to help address the shortage of social housing across Wales.

However, while there is a clear housing strategy, in this third white paper we will draw your attention to the **growing need to accelerate the delivery of truly affordable housing across Wales.** This includes two featured case studies, which focus on localised evidence and **the potential to unlock brownfield land to deliver homes with access to hard and soft infrastructure, which improves access to services and opportunity.**

Our homes have a major impact on our quality of life. They are more than just physical structures, they are places where we need to feel safe, bring up families, protect our possessions, socialise with friends and retreat from the world outside. As such, **we must ensure that any new homes we build are not homogenous boxes; but instead that they deliver a sense of place.** They must be sympathetic to the communities and environment that surround them, providing the safe, secure spaces that people want to live and thrive in.

At EDAROTH we believe in **'housing as a verb'** first quoted by John F.C. Turner and something we do to help **build strong communities and positively impact the health and wellbeing of families and residents.**

Painting the picture

For many years, demand for social and affordable housing has outstripped supply across Wales and the UK.

This is due to a number of contributing factors, such as an increasing and ageing population, caps on local authority borrowing and an overall loss of social housing through UK governments' 'Right to Buy' schemes.

Across Wales **the need for social and affordable housing is evidenced by the lengthy housing waiting lists** of more than 64,000 households. Add to this the challenge of homelessness, overcrowding, hidden households and homes where young adults cannot afford to leave the family home – the scale of the challenge is evident.

In 2016 the Welsh Government committed to £1.5 billion to deliver 20,000 new affordable homes across Wales. Of that figure, 65% (13,000) of the homes were targeted for social rent. According to government figures, 13,143 new affordable homes had been built by March 2019.

While this is laudable, **the Welsh Government will need to accelerate delivery of homes by 34%** to deliver the 6,857 homes needed to meet the target by 2021.

In 2016...

20,000
affordable new homes

65%
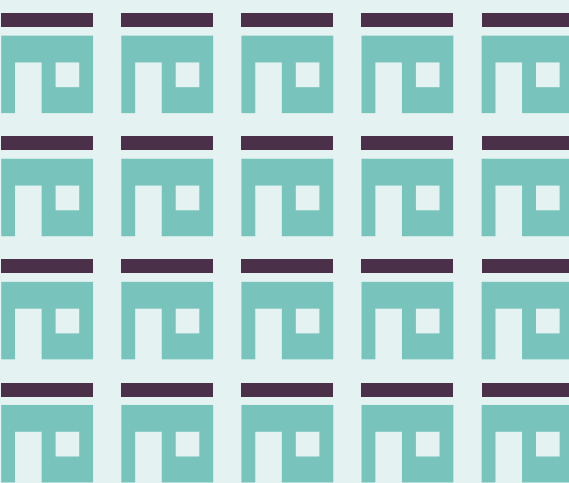
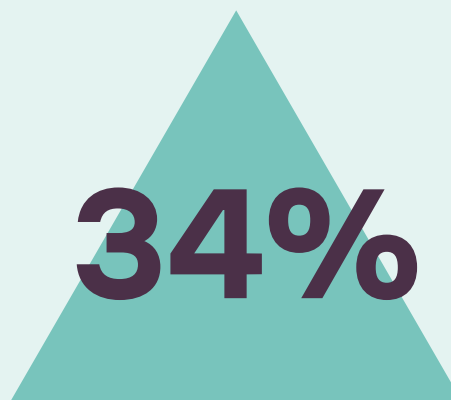of which were for **social rent**

By March 2019...

13,143
affordable homes built

Delivery needs to be accelerated by

34%

to meet the target by 2021

To ensure that local authorities have the provision to deliver the housing that is needed, **Welsh Government planning policy requires local planning authorities to identify specific land for development for a following five-year period.** Carried out on an annual basis, findings are used to inform Joint Housing Land Availability Study (JHLAS) which was then used to inform Local Development Plans.

In the latest figures published in January 2019, the report showed that **out of the 25 local planning authorities, 19 were unable to demonstrate a five-year housing supply.** The report also highlighted that 15 of the local planning authorities have had less than five years' housing supply for three or more years.
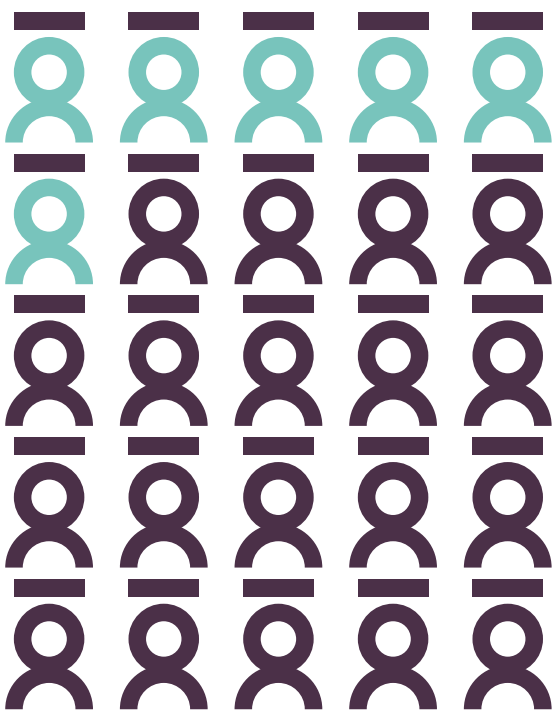
19 of 25

local planning authorities were unable to demonstrate a

five-year housing supply

This remains an issue and challenge for many local authorities - resulting in an overall marked shortfall of deliverable land.

A large number of empty properties still remains a reality, despite the Government's attempt to address this. According to data reported by Shelter Cymru September 2019, there were more than 27,000 empty private-owned homes across Wales, an increase of more than 40% since 2010.

Homes that remain empty can often fall into disrepair or attract anti-social behaviour and vandalism, becoming a blight in the local community.

Bringing these properties back into residential use will help to address some of the housing shortages, while providing opportunity and work for local builders and construction companies.

Why we need more social housing, now!

Covid-19 has brought with it an acute and accelerated focus to preventing and reducing homelessness, as we seek to ensure everyone has a place to call home where they feel safe and secure.

According to Welsh Government statistics released in July 2019, **the number of households threatened with homelessness increased by 18% in 2018-19** to 10,737. The number of households actually assessed as homeless increased by 4% to 11,715. The report also highlighted an **increase of households living in temporary accommodation of 8%** to 2,226 on the 31 March 2019.

People are living longer across Wales. It has been estimated in a 'State of the Nation' report published by the Older People Commissioner for Wales in 2019, that the percentage of the population in Wales aged over 60 will grow from 830,000 (27%) in 2017-18 to 1,008.000 (33%) by 2030.

The report also draws a focus towards changing trends, highlighting that while a majority of older people live in owner-occupier housing (83%), **there is set to be an increase in the number of older people living in private rented housing.** These homes can often be energy inefficient, multi-bedroom homes which can, in some cases, create unnecessary health problems that lead to an increasing demand on health and social care services.

At the other end of the spectrum, across Wales **many young people cannot afford to buy a home for themselves.** This has resulted in many having little option but to take privately rented accommodation. This can **impact their financial security in the future, as some will inevitably struggle to meet continuing demands which may increase the relative poverty of both young and older people alike.** This presents a very real challenge to the Welsh Government: to not only ensure people can live healthier lives and for longer, but also to ensure they have housing provision that is both adaptable and accessible.

18% increase
in household **threatened with homelessness** in 2018-19

8% increase
of households **living in temporary accommodation**

As a result of societal and demographic challenges, and recent evidence, we now know that **increasing numbers of households are becoming single occupancy households** with an expected rise of 30% in the next 20 years. This has **increased the demand for local authorities across Wales to create additional provision of one and two-bedroom homes at a social rent tenure, while maintaining a healthy provision of family homes.**

Total stock at social rent

Wales

FLATS TOTAL	HOUSES TOTAL
58,123	**136,292**

Self-contained bedsits total

1,140

FLATS

Number of bedrooms

28,977 (49.9%)

27,574 (47.4%)

1,546 (2.7%)

26 (0.0%)

1

2

3

4+

HOUSES

Number of bedrooms

4,937 (3.6%)

42,934 (31.5%)

83,439 (61.2%)

4,563 (3.3%)

419 (0.3%)

1

2

3
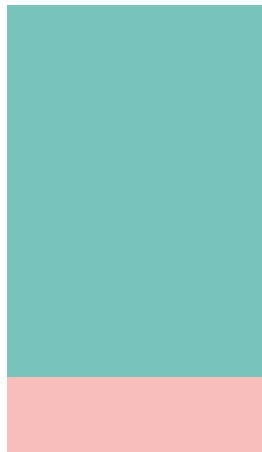
4

5+
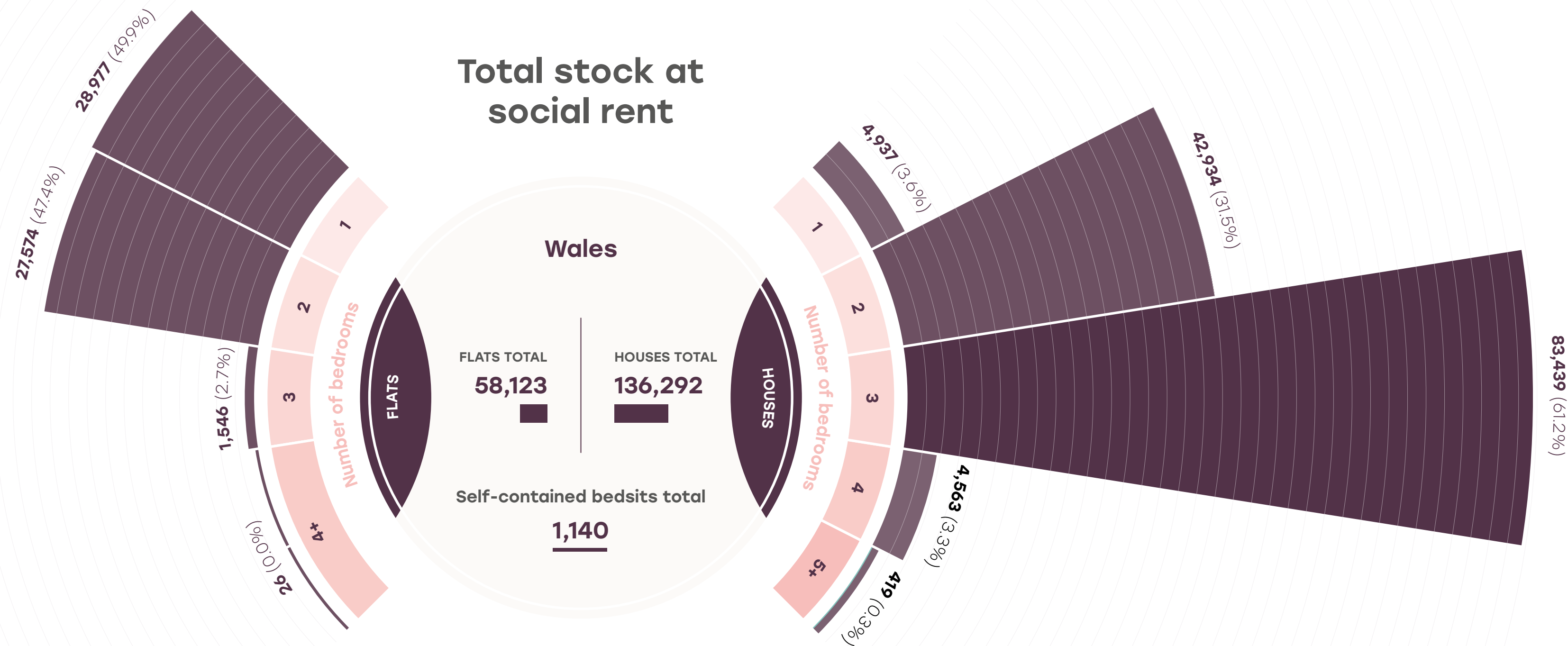
So, what's the problem?

The private rental sector has more than doubled since 2001, capturing a large percentage of the rental housing market.

The housing and construction industry needs

44,690

new entrants per annum across the UK **to maintain the sector and traditional skills currently in use**

Total number of apprentices that completed their training **across all trades in 2015**

7,280

To redress the balance, and meet the growing demand of social and truly affordable housing, local authorities across Wales must return to their traditional roles as builders and housing providers.

Cost-to-build remains a major barrier for many local authorities across Wales, and indeed much of the UK. This is especially acute for social housing, where the **cost-to-build often exceeds that of the overall market value of the property.**

To redress this, we need to understand the wider value that quality social housing provides, taking into account impacts on health, wellbeing and opportunity, which can reduce the impact on public services, and boost local productivity.

The Construction Industry Training Board has estimated that the **housing and construction industry will need 44,690 new entrants per annum across the UK to maintain the sector and traditional skills currently used.** In 2015, just 7,280 apprentices completed their training across all trades.

Added to this, the **impact of Brexit could further exacerbate the skills shortage** due to a lack of skills and labour provided by EU nationals.

To counteract these issues, Wales, and indeed the whole of the UK, will need to take a range of approaches - including **modern methods of construction which reduce the need for traditional building trades that are fast disappearing.**

New dwellings completed annually

	1975-76	1980-81	1985-86	1990-91	1995-96	2000-01	2005-06	2010-11	2015-16	2016-17	2018-19

Private enterprise new dwellings
- 49.90% 8,308
- 53.72% 5,500
- 82.24% 6,732
- 78.74% 8,087
- 75.02% 6,876
- 88.64% 7,386
- 95.56% 7,883
- 81.98% 4,513
- 81.83% 5,646
- 81.81% 5,590
- 77.70% 4,489

Registered social landlords new dwellings
- 1.59% 264
- 9.09% 931
- 9.75% 798
- 16.71% 1,716
- 23.19% 2,126
- 10.80% 900
- 4.21% 347
- 18.02% 992
- 18.17% 1,254
- 18.19% 1,243
- 21.31% 1,231

Local authority new dwellings
- 48.51% 8,077
- 37.81% 3,807
- 8.01% 656
- 4.55% 467
- 1.79% 164
- 0.56% 47
- 0.23% 19
- 0% 0
- 0% 0
- 0% 0
- 0.99% 57

Total new dwellings

16,649	10,238	8,186	10,270	9,166	8,333	8,249	5,505	6,900	6,833	5,777

Reasons to be optimistic

Like many regions across the UK, we have witnessed a reduction in the number of social and local authority-owned homes across the nation of Wales. However, on further analysis, it's clear that, despite this, many local authorities across Wales have continued to maintain a healthy percentage of social housing stock.

To further protect existing social housing stock, the Welsh Government abolished the 'Right to Buy' scheme in January 2019, demonstrating its commitment to delivering and sustaining truly affordable housing. In the Independent Review of Affordable Housing Supply report, published April 2019, the Welsh Government produced a central estimate suggesting **a need to deliver 8,300 new homes of all tenures annually over the next five years.**

This includes 1,100 homes per year to clear the existing backlog of unmet need. If adopted, this represents a significant increase from 5,777 delivered in 2018-19.

The new National Development Framework, due to be published September 2020 will replace the existing Wales Spatial Plan. **The new framework will set out national spatial strategies for future developments during the period of 2020 to 2040.**
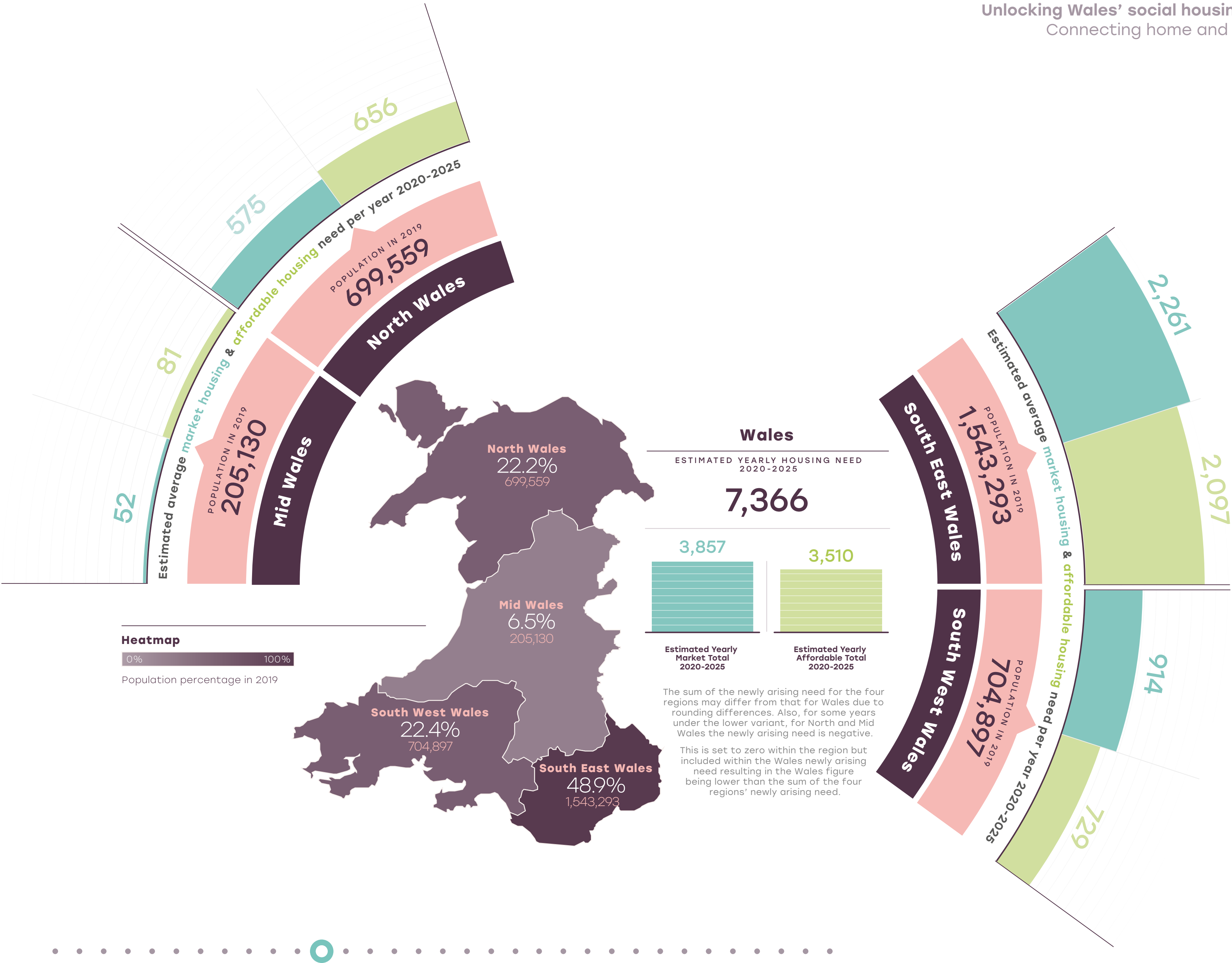
Need to deliver

8,300
new homes
of all tenures **annually** over

5 Years

This includes

1,100
new homes
per year to clear the
existing backlog of unmet need

Linked to, and influenced by, the Well-Being Future Generations Act (Wales) 2015, the framework communicates a clear commitment to housing, infrastructure, place-making and the environment.

While this is clearly a big step in the right direction taken by the Welsh Government, **it will be important that this does not cause a halt in construction as local authorities look to adopt new systems and approaches.**

656

575

81

52

Estimated average market housing & affordable housing need per year 2020-2025

POPULATION IN 2019
699,559

POPULATION IN 2019
205,130

North Wales

Mid Wales

Heatmap

0%   100%

Population percentage in 2019

North Wales
22.2%
699,559

Mid Wales
6.5%
205,130

South West Wales
22.4%
704,897

South East Wales
48.9%
1,543,293

Wales
ESTIMATED YEARLY HOUSING NEED
2020-2025

7,366

3,857

3,510

Estimated Yearly Market Total 2020-2025

Estimated Yearly Affordable Total 2020-2025

The sum of the newly arising need for the four regions may differ from that for Wales due to rounding differences. Also, for some years under the lower variant, for North and Mid Wales the newly arising need is negative.

This is set to zero within the region but included within the Wales newly arising need resulting in the Wales figure being lower than the sum of the four regions' newly arising need.

South East Wales

South West Wales

POPULATION IN 2019
1,543,293

POPULATION IN 2019
704,897

Estimated average market housing & affordable housing need per year 2020-2025

2,261

2,097

914

729

Unlocking the value of modern methods of construction

To overcome shortages in social housing and construction skills, industry and local authorities need to look beyond traditional methods of construction if they are to deliver the safe, secure, high-quality homes that people need.

In the report 'Re-imagining social house building in Wales', published February 2020, the Welsh Government communicated a clear commitment to modern methods of construction as part of its social housing strategy, while supplying additional support to small and medium sized enterprises.

Modern methods of construction and off-site manufacturing deliver clear benefits when considering cost, reliability and speed of delivery. In addition, manufacturing homes off-site in controlled factory settings reduces impact on the environment, and site disruption, and it delivers improvements in health and safety. Delivered at scale, modern methods of construction deliver the opportunity to accelerate the delivery of much-needed housing across Wales.

In the Independent Review of Affordable Housing Supply the panel recommended the use of modern methods of construction and off-site manufacturing to deliver near-zero carbon homes. **This presents a very real opportunity, through the use of new techniques and materials, to meet the Welsh Government's ambition to decarbonise the construction process, while delivering quality homes at scale.**

Modern methods of construction represent more than just a building process. They provide the opportunity to unlock the value and potential of complicated sites that are normally ignored by traditional developers. As the sector expands, new construction methods will call on, and provide, new skills and opportunities for people and supply chain businesses across Wales.

Rhondda Cynon Taf case study

Case study: Rhondda Cynon Taf

Situated in South Wales near to Cardiff, the county borough of Rhondda Cynon Taf consists of five valleys and a number of towns and villages. Aberdare, which is estimated to be the largest town by population in the county, will also feature in this case study to help bring a focus to the potential value of unlocking brownfield land in the area.

As a county, Rhondda Cynon Taf has retained much of its social housing stock in the area. However, between 2002 and 2019, **it has witnessed a decrease of 5.6% of total social housing stock.** This is above the national average across Wales, which is at a 1.5% decrease in the same time period. By 2018-19, 100% of the 15,651 social homes in Rhondda Cynon Taf were under registered social landlord ownership.

In the five-year housing supply plan submitted by Rhondda Cynon Taf, they **estimated the capacity to deliver 2,208 homes.** Of that number, 77% will be delivered by the private sector while the remaining 23% will be delivered by housing associations. In October 2018, Shelter Cymru estimated a housing waiting list of 3,706, highlighting the need to accelerate development plans.

2019-2024 land supply breakdown (Cat 1 & 2*) Rhondda Cynon Taf
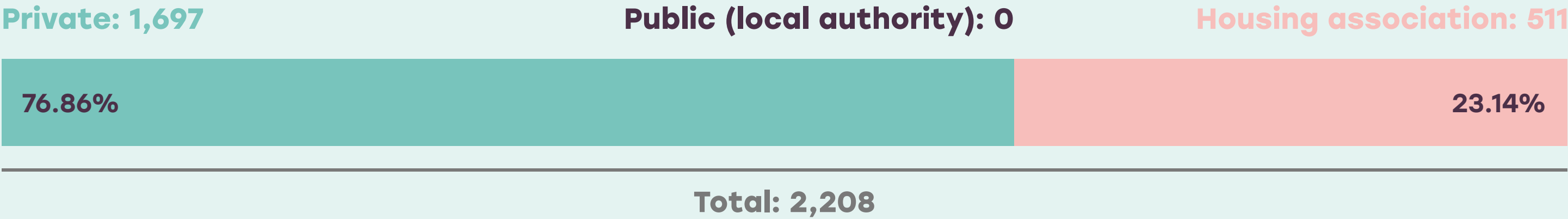
Private: 1,697   **Public (local authority): 0**   **Housing association: 511**

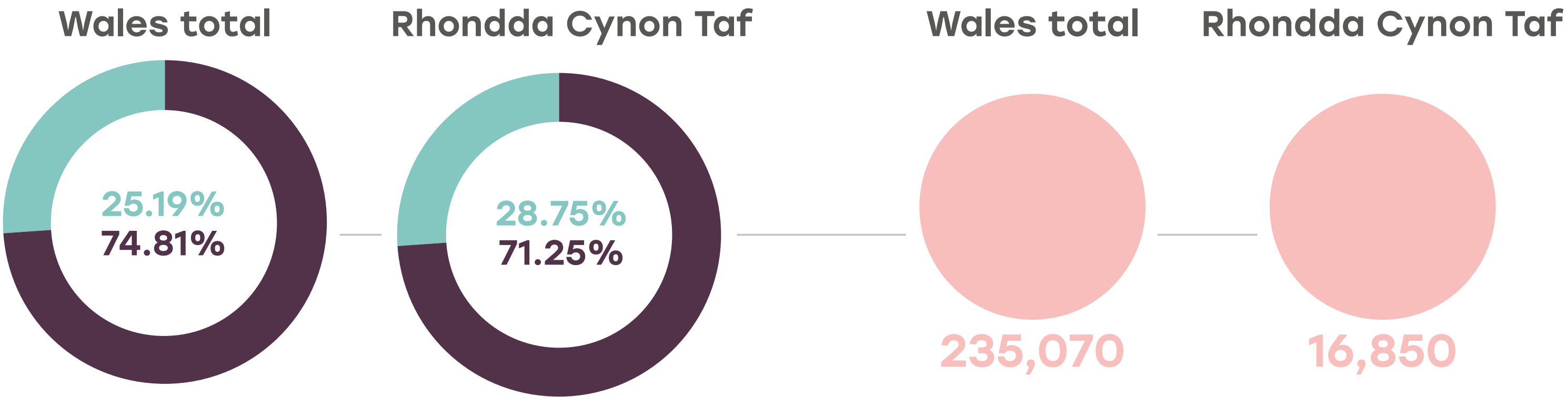| 76.86%	23.14%

Total: 2,208

*Five-year housing supply plan applies only to Cat 1 & 2 large sites i.e. sites under construction or where development can commence immediately so that there is reasonable time for dwellings to be completed within five years.
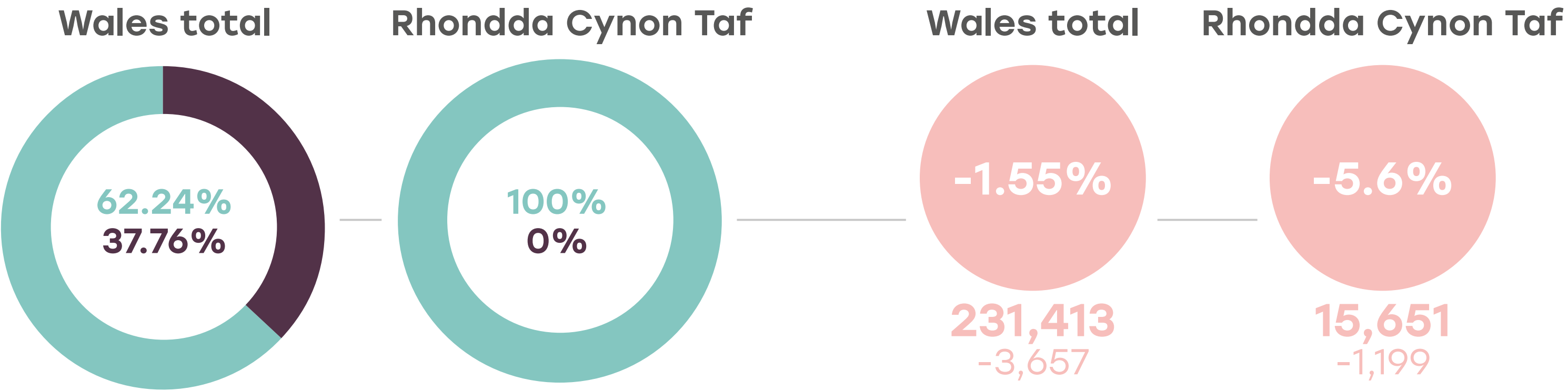
Social housing stock

While Rhondda Cynon Taf has experienced only a 5.6% fall in social housing stock, 100% of that stock has been transferred into registered social landlord ownership.

2002 - 2003

Wales total

25.19%
74.81%

Rhondda Cynon Taf

28.75%
71.25%

Wales total

235,070

Rhondda Cynon Taf

16,850

2018-2019

Wales total

62.24%
37.76%

Rhondda Cynon Taf

100%
0%

Wales total

-1.55%

231,413
-3,657

Rhondda Cynon Taf

-5.6%

15,651
-1,199

○ Local Authority owned social housing

○ Registered social landlords owned social housing

● Total social housing

Housing need

Rhondda Cynon Taf borough council estimated a total housing requirement of 14,385 between 2006 to 2021 in their local development plan.

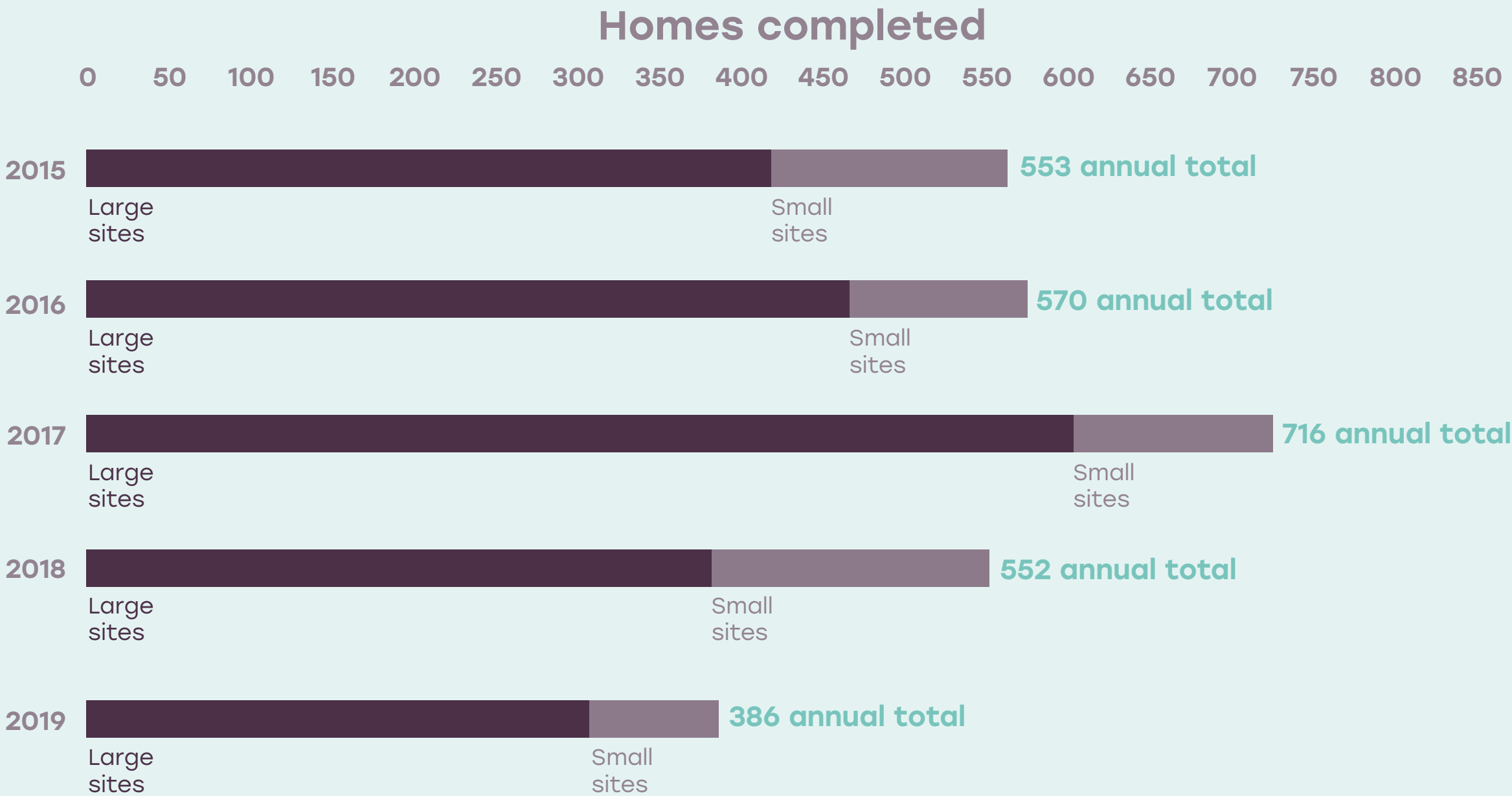Total housing requirement 2006 – 2021 from adopted LDP

14,385

Completions 2006 – 2019

6,299

43%

Homes completed

| 0 | 50 | 100 | 150 | 200 | 250 | 300 | 350 | 400 | 450 | 500 | 550 | 600 | 650 | 700 | 750 | 800 | 850 |

Breakdown by year

2015
Large sites — Small sites
553 annual total

2016
Large sites — Small sites
570 annual total

2017
Large sites — Small sites
716 annual total

2018
Large sites — Small sites
552 annual total

2019
Large sites — Small sites
386 annual total

Having completed 43.8% of that total by 2019, it will **need to increase to an average of 4,043 per annum in the remaining two years to 2021 to achieve its target.**
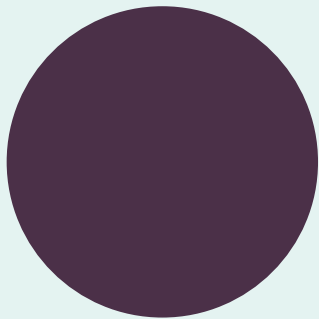
2,165
Large sites completed in the last 5 years

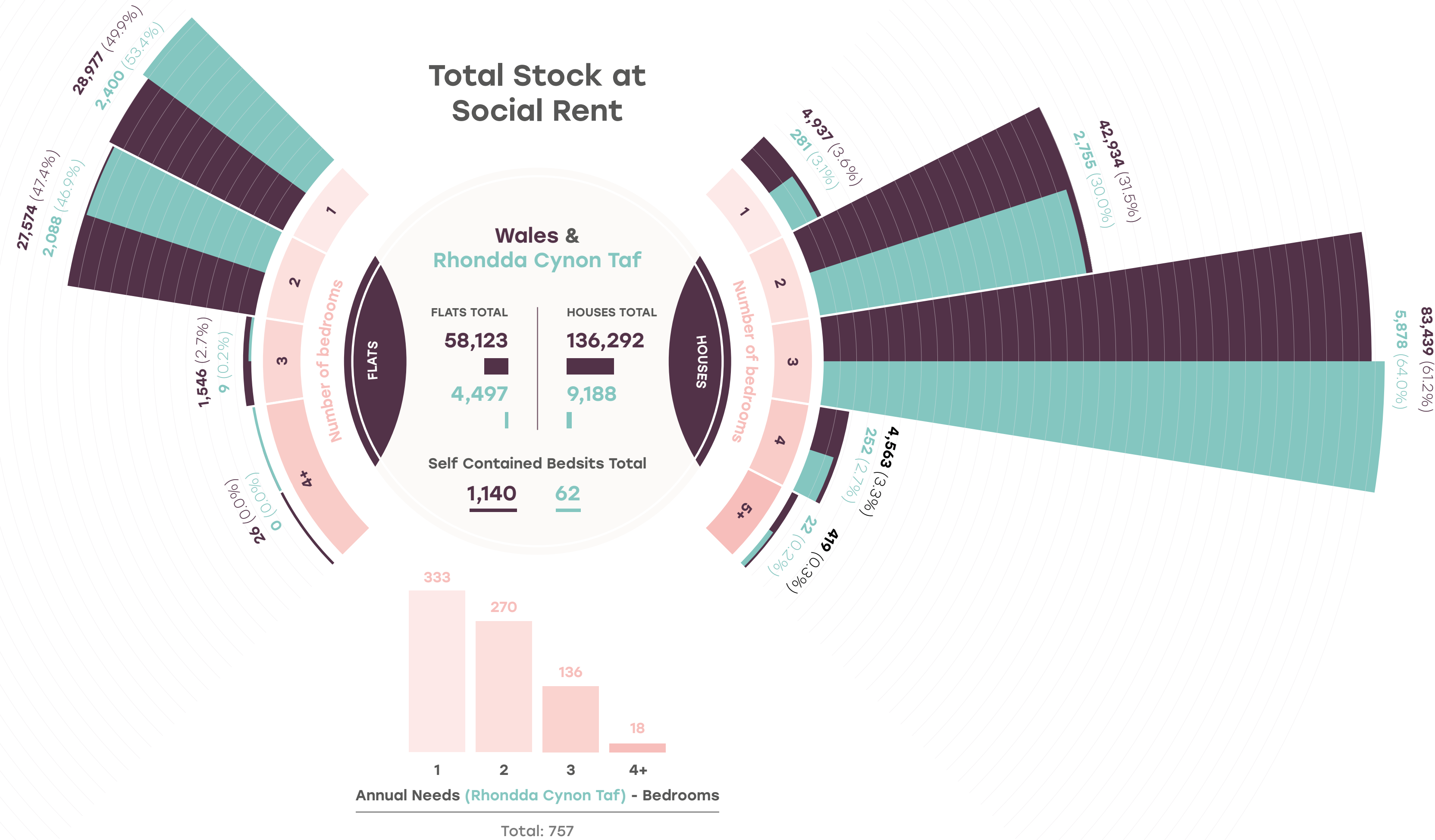**612**
Small sites completed in the last 5 years

2,777
Total completions in the last 5 years

4,043
completions required per annum to meet the target

Total housing stock for rent in Rhondda Cynon Taf is comparable with the national average across Wales, with a focus on two and three-bedroom houses for multiple occupancy, and one and two-bedroom homes in higher density models. According to their estimated affordable housing need, 80% of homes have one and two bedrooms, which is in line with an increase in single occupancy households. **To meet the need, Rhondda Cynon Taf will need to consider high density models which are sympathetic to the surrounding area and community.**

Total Stock at Social Rent

Wales & Rhondda Cynon Taf

FLATS TOTAL
58,123
4,497

HOUSES TOTAL
136,292
9,188

Self Contained Bedsits Total
1,140   62

FLATS — Number of bedrooms

1 28,977 (49.9%) / 2,400 (53.4%)
2 27,574 (47.4%) / 2,088 (46.9%)
3 1,546 (2.7%) / 9 (0.2%)
4+ 26 (0.0%) / 0 (0.0%)

HOUSES — Number of bedrooms

1 4,937 (3.6%) / 281 (3.1%)
2 42,934 (31.5%) / 2,755 (30.0%)
3 83,439 (61.2%) / 5,878 (64.0%)
4 4,563 (3.3%) / 252 (2.7%)
5+ 419 (0.3%) / 22 (0.2%)

Annual Needs (Rhondda Cynon Taf) - Bedrooms

1	2	3	4+
333	270	136	18

Total: 757

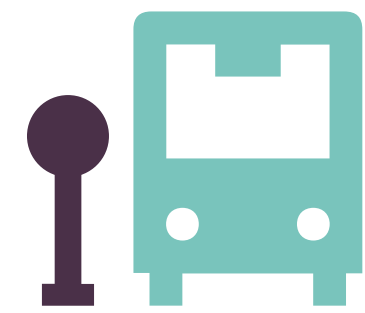# Access to employment and opportunity

As the largest town in the county of Rhondda Cynon Taf, Aberdare is situated just four miles from Merthyr Tydfill, and 20 miles from Cardiff with a journey time of 50 minutes by train.

With a population of 31,505, of the 10,432 people commuting to work, 6,749 of those commute to locations outside the town. More than 42% of that number are concentrated in Cardiff, Merthyr Tydfil and Pontypridd, while almost 7.3% travel to rural locations.

Number of commuters

111   739

Ebbw Vale

Merthyr Tydfil

Blackwood

Maesteg

Pontypridd

Newport

Caerphilly

Bridgend

Cardiff

Census data also reveals that

28.81%
of households in Aberdare
do not have a car or van,
**increasing the reliance on
public transport**

Based on the latest furloughing data and local
employee profiles, the Office of National Statistics has
**estimated that more than 25% of employees who live
in Aberdare are at risk of losing their jobs** as a result
of Covid-19. It will, therefore, **be essential to ensure
that new and truly affordable homes are built within
good proximity to transport links** vital to the local
economy and livelihood of residents.

Denbighshire case study

Case study: Denbighshire

Situated in North East Wales, and close to the English border, the county of Denbighshire is bound by coastline to the north and hills to the east, south and west. The seaside town and resort of Rhyl also features in this case study, bringing a focus to the potential value of unlocking brownfield land in the area.

As a county, **Denbighshire, like Rhondda Cynon Taf, has retained much of its social housing stock,** slightly increasing by 0.5% the total housing stock over the same time period. While there is a slight decrease of local authority-owned homes by 14%, registered social landlords have increased by almost 32%. Of the total housing stock in Denbighshire during 2018-19, 58% remain in local authority ownership outperforming the national average. In October 2018, Shelter Cymru estimated a **social housing waiting list of 1,223 in this area.**

In the last five-year housing supply plan submitted by Denbighshire County Council, it has estimated the capacity to deliver a total of 1,630 homes. Of that number, 255 are to come from the local authority and housing associations.

2019-2024 land supply breakdown (Cat 1 & 2*) Denbighshire
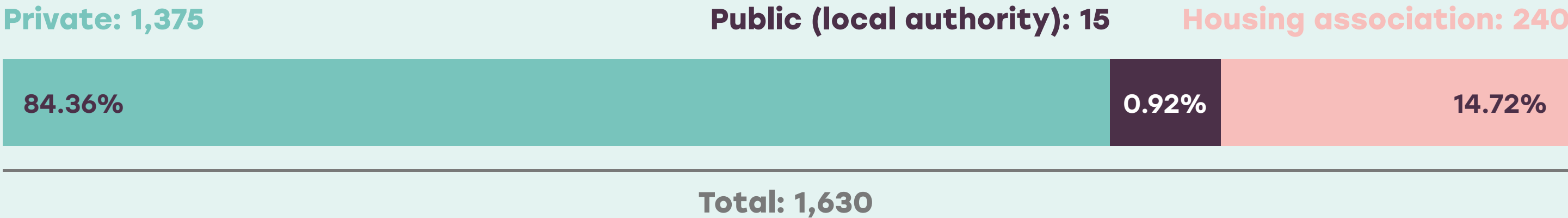
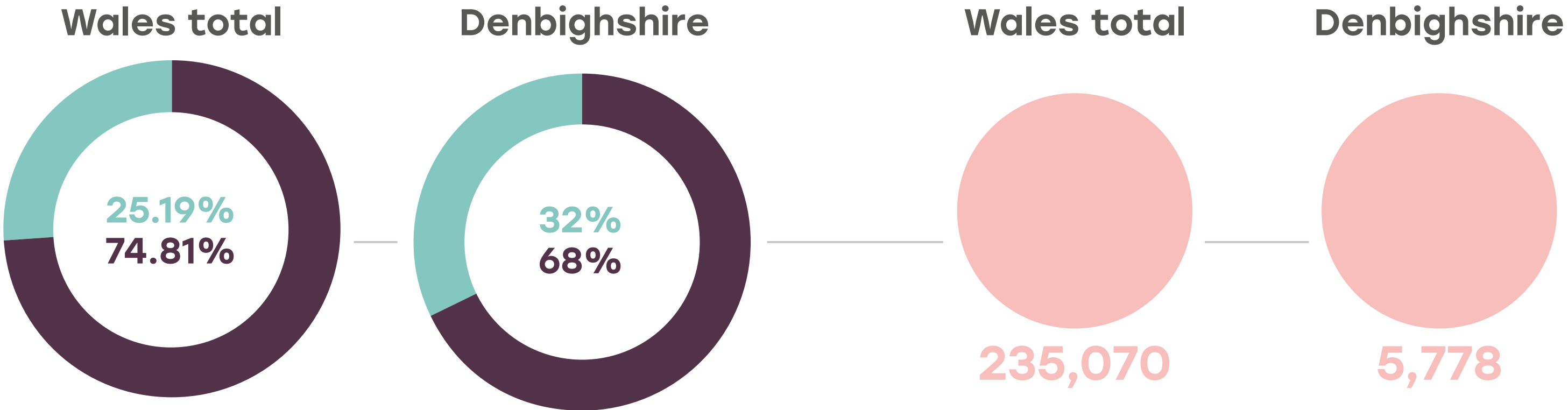| Private: 1,375	Public (local authority): 15	Housing association: 240
84.36%	0.92%	14.72%

Total: 1,630

*Five-year housing supply plan applies only to Cat 1 & 2 large sites i.e. sites under construction or where development can commence immediately so that there is reasonable time for dwellings to be completed within five years.
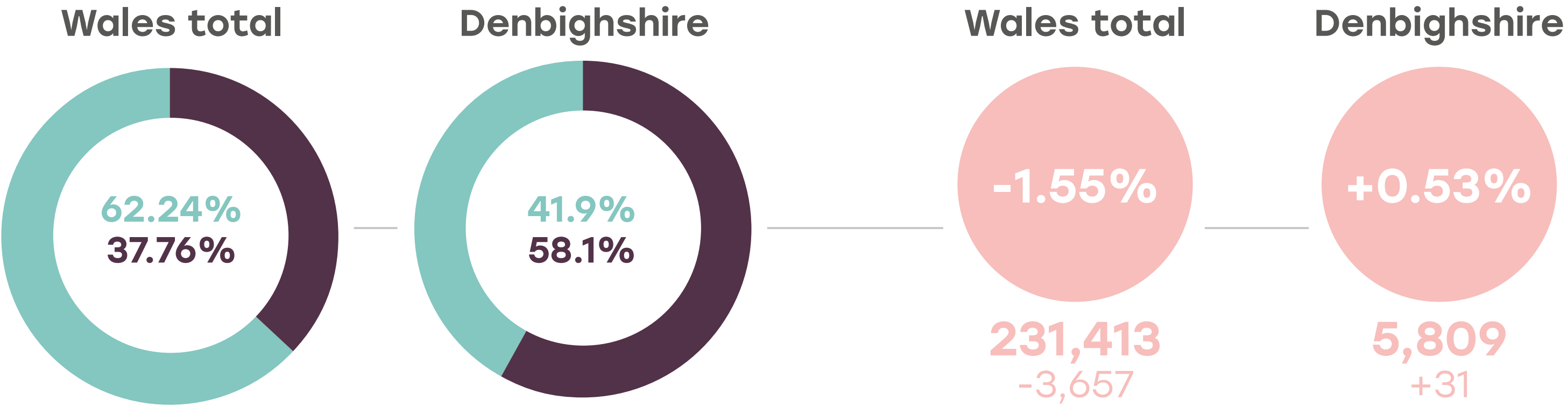
Social housing stock

Denbighshire has witnessed a small increase in social housing stock, with a majority of homes remaining in local authority ownership.

2002 - 2003

Wales total

25.19%
74.81%

Denbighshire

32%
68%

Wales total

235,070

Denbighshire

5,778

2018-2019

Wales total

62.24%
37.76%

Denbighshire

41.9%
58.1%

Wales total

-1.55%

231,413
-3,657

Denbighshire

+0.53%

5,809
+31

Local Authority owned social housing

Registered social landlords owned social housing
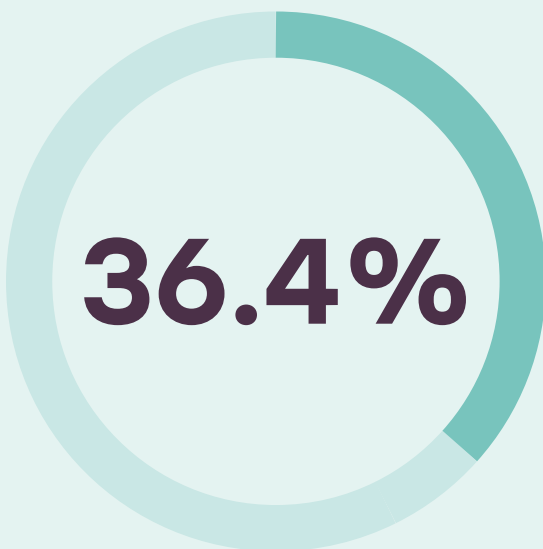
Total social housing

Housing need

Denbighshire County Council, estimated a total housing need requirement of 7,500 between 2006 to 2021 in its local development plan.

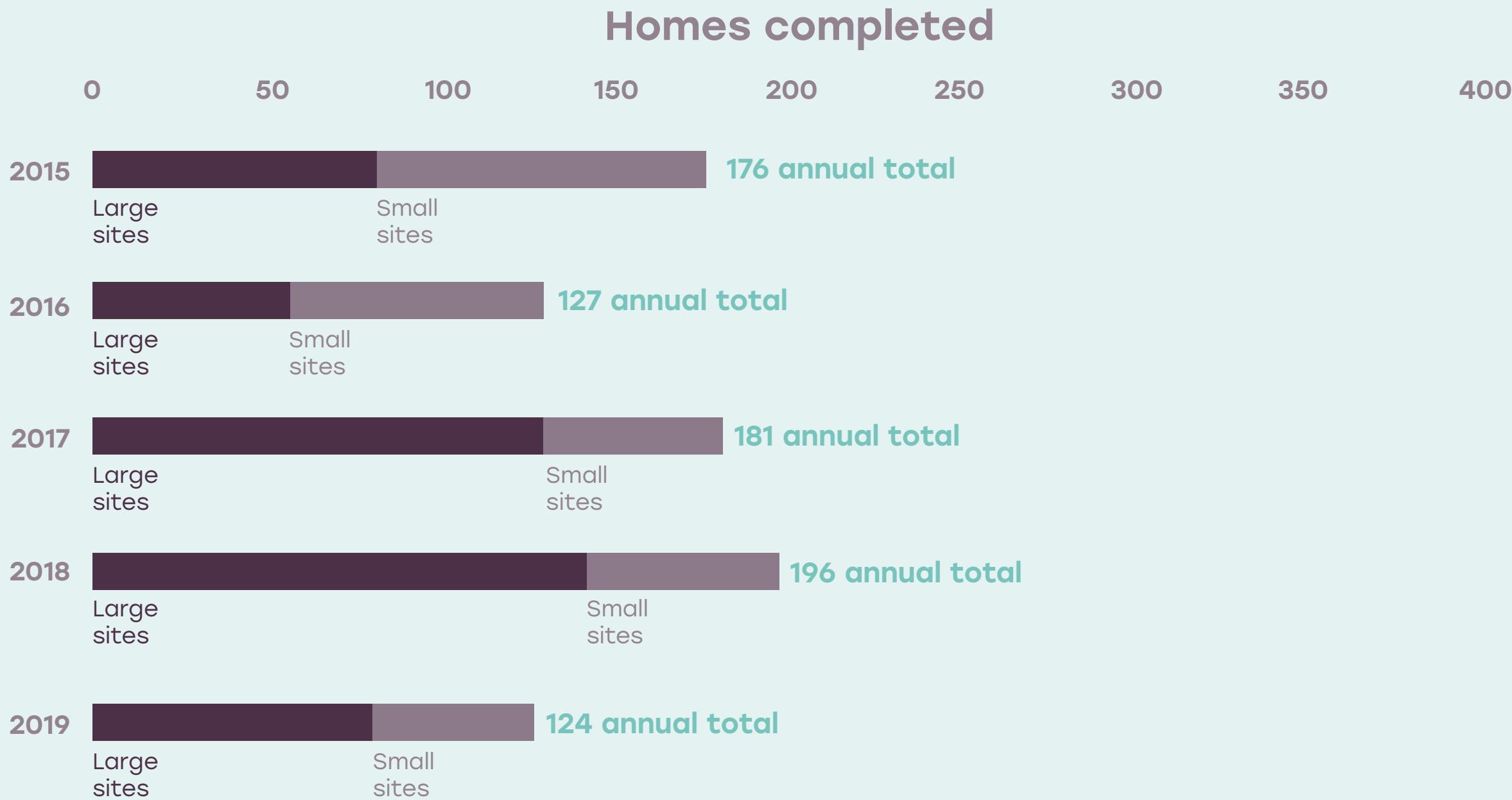Total housing requirement 2006 – 2021 from adopted LDP

7,500

Completions 2006 – 2019

2,730

36.4%

Homes completed

0	50	100	150	200	250	300	350	400

Breakdown by year

2015 — **176 annual total**
Large sites   Small sites

2016 — **127 annual total**
Large sites   Small sites

2017 — **181 annual total**
Large sites   Small sites

2018 — **196 annual total**
Large sites   Small sites

2019 — **124 annual total**
Large sites   Small sites

Having completed 36.4% of that total by 2019, it will **need to significantly increase to an average of 2,385 per annum in the remaining two years if the council is to achieve its target.**
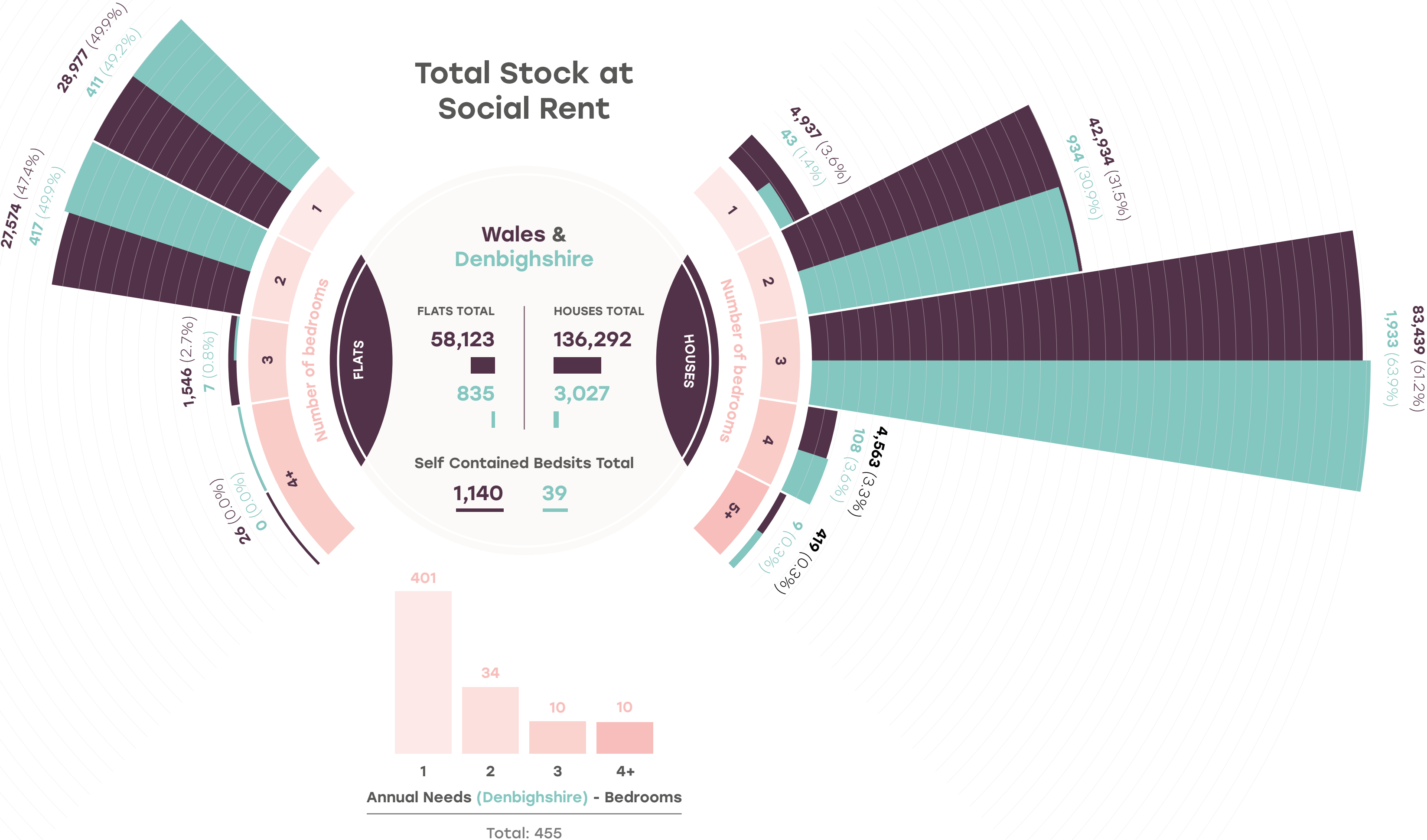
486
Large sites completed in the last 5 years

318
Small sites completed in the last 5 years

804
Total completions in the last 5 years

2,385 completions required per annum to meet the target

Again, the total social housing stock for rent in Denbighshire, like Rhondda Cynon Taf, is comparable with the national average across Wales, with a focus on two and three-bedroom houses, and one and two-bedroom homes in higher-density models. According to Denbighshire estimated housing affordable need, there is an **increased emphasis on delivering one bedroom single occupancy households.** Much like Rhondda Cynon Taf, Denbighshire will **need to consider high density models which are sympathetic to the surrounding area and community.**

Total Stock at Social Rent

Wales & Denbighshire

FLATS TOTAL	HOUSES TOTAL
58,123	**136,292**
835	3,027

Self Contained Bedsits Total

1,140   **39**

Number of bedrooms — FLATS

1 — 28,977 (49.9%) / 411 (49.2%)
2 — 27,574 (47.4%) / 417 (49.9%)
3 — 1,546 (2.7%) / 7 (0.8%)
4+ — 26 (0.0%) / 0 (0.0%)

Number of bedrooms — HOUSES

1 — 4,937 (3.6%) / 43 (1.4%)
2 — 42,934 (31.5%) / 934 (30.9%)
3 — 83,439 (61.2%) / 1,933 (63.9%)
4 — 4,563 (3.3%) / 108 (3.6%)
5+ — 419 (0.3%) / 9 (0.3%)

Annual Needs (Denbighshire) - Bedrooms

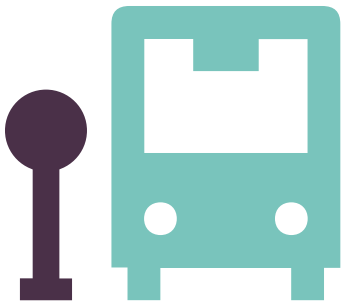| 1	2	3	4+
401	34	10	10

Total: 455

Access to employment and opportunity

With a population of 25,640, of the 8,028 people who live and commute to work from Rhyl, 60% commute to locations outside the town.

Of that number, more than 28% commute to rural locations and 6% to locations within England. Conversely, there are 4,732 commuting to Rhyl, of which 19% are from rural locations while 46% are from Rhuddlan, Prestatyn, Colwyn Bay and Kinmel Bay.

Number of commuters

103   1,061

Colwyn Bay

Rhyl

Prestatyn

Abergele

Holywell

Denbigh

Ruthin

Census data also reveals that

33.06%
of households in Rhyl
do not have a car or van,
**increasing the reliance on
public transport**

Based on the latest furloughing data and local employee profiles, the Office of National Statistics has estimated that **almost 28% of employees who live in Rhyl are at risk of losing their jobs** as a result of Covid-19. As an area which has witnessed increased deprivation due to falling tourism revenues, it will therefore be **vital to deliver homes that provide improved connectivity to employment opportunities for residents.**

Unlocking brownfield land

Unlocking the potential of brownfield land

Brownfield land is often located within existing communities and linked existing infrastructure and utilities with access to education, healthcare, local transport and economic centres.

Often regarded as a blight by the local community, we believe that **making brownfield land available for social housing within existing communities promotes inclusivity, diversity and social mobility. This delivers positive health and wellbeing benefits for residents and surrounding communities.**

As the Welsh Government does not require brownfield data from local authorities, we used satellite images to assess the plots listed in the land availability studies to ascertain potential space availability of brownfield sites.
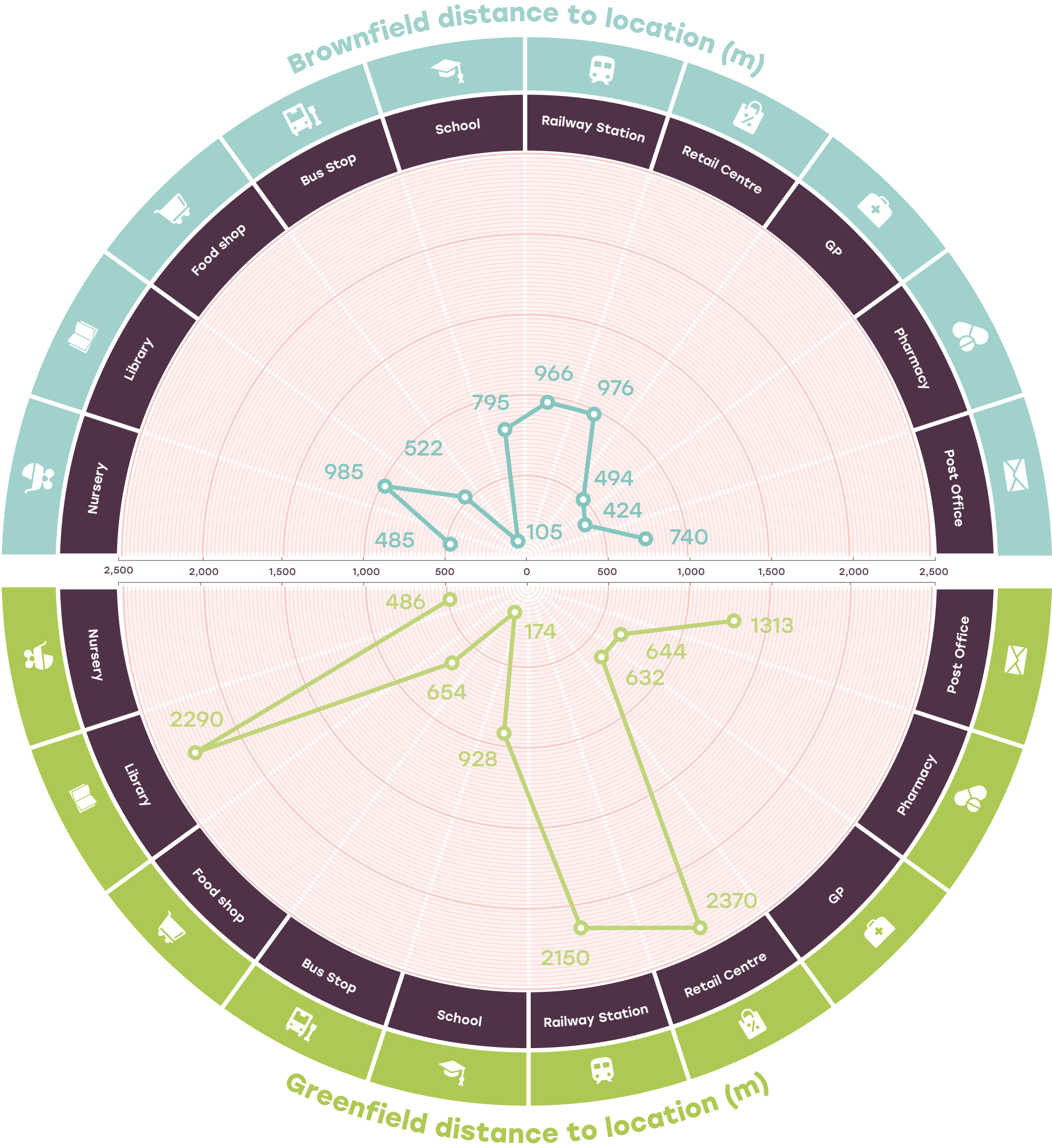
In Aberdare, **of the 10 indicators we have used to calculate connectivity to services, education, and public transportation, on average eight indicators outperform greenfield sites.**

During 2018-19 they have completed 109 housing units on brownfield land which, at 57 units, is almost double the number completed on greenfield sites in the same timescale. **The scale of opportunity to deliver housing units remaining on brownfield land far outstrips that of greenfield by 729%.**

Brownfield distance to location (m)

Greenfield distance to location (m)
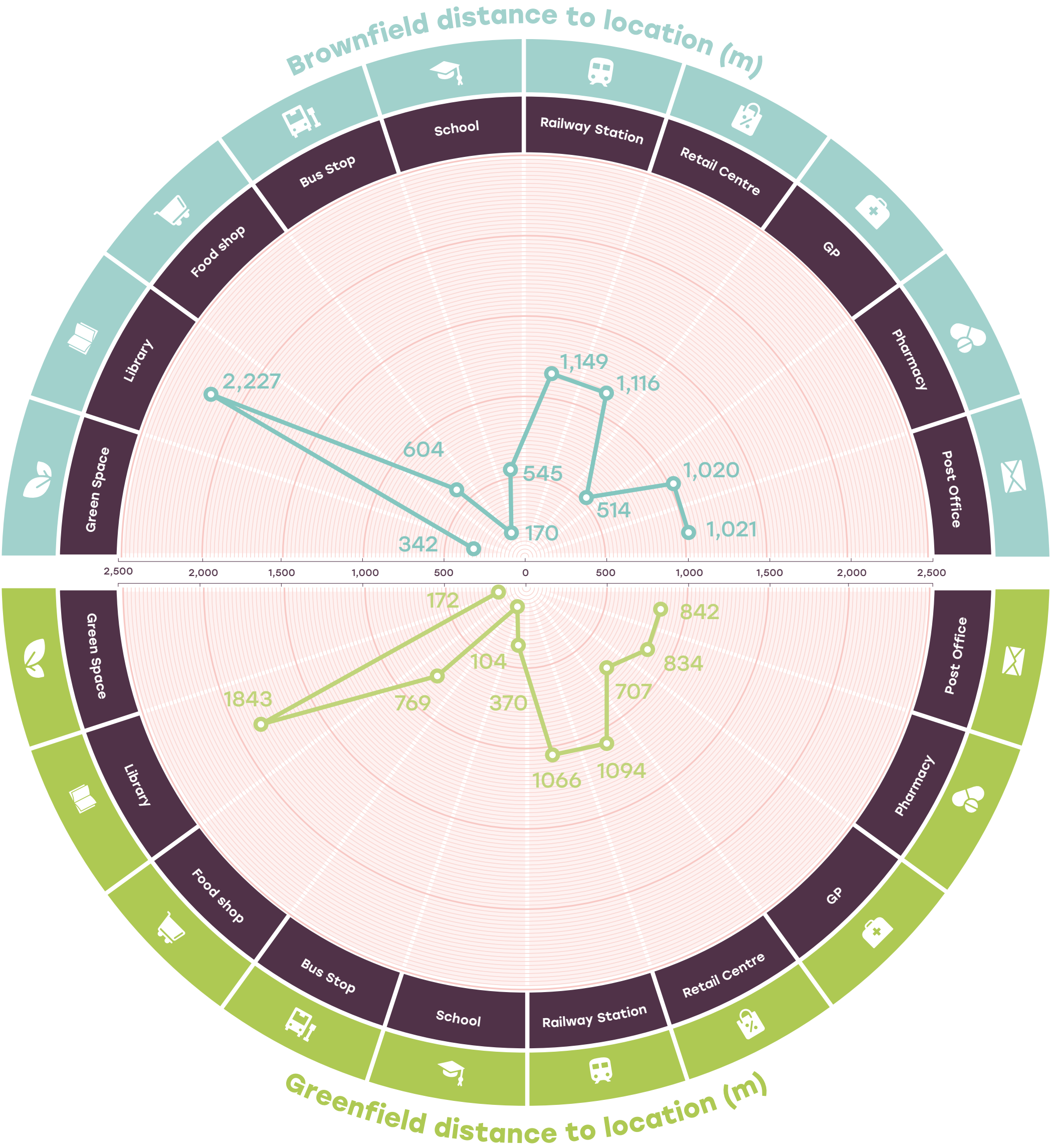
In Rhyl, **of the 10 indicators we have used to calculate connectivity to services, education, and public transportation, on average all indicators outperform greenfield sites.** On closer analysis, with the capacity to deliver 206 housing units on brownfield land, this is **particularly impactful when we consider access to public transport and the retail centre.**

Brownfield distance to location (m)

Railway Station
Retail Centre
School
GP
Bus Stop
Pharmacy
Food shop
Post Office
Library
Nursery

966, 976, 795, 522, 985, 494, 424, 105, 485, 740

2,500 2,000 1,500 1,000 500 0 500 1,000 1,500 2,000 2,500

Greenfield distance to location (m)

Nursery
Post Office
Library
Pharmacy
Food shop
GP
Bus Stop
Retail Centre
School
Railway Station

486, 174, 1313, 654, 644, 632, 2290, 928, 2370, 2150

Conclusion and recommendations

As the Welsh Government launches a new strategy to tackle housing shortages, **it also has a unique opportunity to change the lives of thousands of its citizens.**

At the heart of this is the **need to meet a growing demand to accelerate the delivery of social housing, reduce housing waiting lists, and help eradicate homelessness and rough sleeping by supplying safe, secure and truly affordable homes.**

To meet the growing **need for single occupancy homes, local authorities will need to consider low rise high-density models sympathetic to their surrounding areas.** These developments will also need to adhere to the principles of the Wellbeing of Future Generations Act (Wales) 2015 - and the National Development Framework, embedding the principles of the Act, including the five ways of working: long-term thinking, prevention, collaboration, integration and involvement.

It is imperative to approach the challenge on all fronts to meet the housing challenge. To do this, the Welsh Government and local authorities will **need to take a range of approaches including traditional construction, and modern methods of construction and off-site manufacturing,** in conjunction with **bringing disused homes left empty and unloved back into use** as modern housing stock.

To fully realise the potential of modern methods of construction, the Welsh Government, local authorities, housing associations and industry must work collaboratively to accelerate the development of skills and supply chain capabilities if we are to meet the housing challenges at scale.

While greenfield land should still be considered wherever it is better connected to communities, **brownfield land offers huge potential to protect the environment and provide the right homes in the right places.** This land is often located within existing communities with better than average access to schools, healthcare and economic centres, providing and enduring more positive outcomes for residents and local authority landlords. By providing a brownfield register, the Welsh Government and local authorities could support a better understanding and identify the full scale of this opportunity.

Government, local authorities and industry must work together to understand the true value of social housing beyond the physical structure. This they will achieve by **recognising the wider positive impact that new social housing has on communities, and on the health, wellbeing and productivity of the people living in those communities** - and how this reduces the burden on public services, while improving economic outcomes.

Appendix

Research and data sources

This whitepaper is fully independent and in no way reflects the opinion of the Welsh Government or Welsh local authorities highlighted in the case studies contained within.

❭ **Research and data sources Welsh Government**
Homelessness in Wales, 2018-19
Data accessed August 2020
https://gov.wales/sites/default/files/statistics-and-research/2019-07/homelessness-april-2018-march-2019-993.pdf

❭ **Future Generations Commissioner for Wales**
The Future Generations Report 2020
Data accessed August 2020
https://www.futuregenerations.wales/wp-content/uploads/2020/05/FGC-Report-English.pdf

❭ **Welsh Government**
Re-imagining social house building in Wales
Data accessed August 2020
https://gov.wales/sites/default/files/publications/2020-02/social-house-building-strategy_0.pdf

❭ **Welsh Government**
Housing Land Availability in Wales
Data accessed August 2020
https://gov.wales/sites/default/files/publications/2019-05/housing-land-availability-in-wales-2018.pdf

❭ **Older People's Commissioner for Wales**
State of the Nation
Data accessed August 2020
http://www.olderpeoplewales.com/Libraries/Uploads/State_of_the_Nation_e_-_online.sflb.ashx

❭ **BBC News**
Number of empty homes in Wales up 40%
to 27,000 since 2009
Data accessed August 2020
https://www.bbc.co.uk/news/uk-wales-49638043

❭ **Shelter Cymru**
Social Housing Waiting Lists Rhondda Cynon Taf
Data accessed August 2020
https://sheltercymru.org.uk/social-housing-waiting-lists-rhondda-cynon-taf/

❭ **Shelter Cymru**
Social Housing Waiting Lists Denbighshire
Data accessed August 2020
https://sheltercymru.org.uk/social-housing-waiting-lists-denbighshire/

❭ **StatsWales**
Data accessed August 2020
https://statswales.gov.wales/Catalogue

❭ **Office for National Statistics**
Housing affordability in England and Wales: 2019
Data accessed August 2020
https://www.ons.gov.uk/peoplepopulationand community/housing/bulletins/housingaffordability inenglandandwales/2019

❭ **Denbighshire County Council**
Joint Housing Land Availability Study (JHLAS)
for 2019
Data accessed August 2020
https://www.denbighshire.gov.uk/en/resident/planning-and-building-regulations/local-development-plan/ldp-evidence-monitoring-information/joint-housing-land-availability-study-2019.pdf

❭ **Denbighshire County Council**
Joint Housing Land Availability Study (JHLAS)
for 2019
Data accessed August 2020
https://www.denbighshire.gov.uk/en/search/search.aspx?q=joint-housing-land-availability-study-2019#gsc.tab=0&gsc.q=joint-housing-land-availability-study-2019&gsc.page=1

❭ **Denbighshire County Council**
Denbighshire Local Housing Market Assessment
Strategic Planning and Housing July 2019
Data accessed August 2020
https://www.denbighshire.gov.uk/en/documents/planning-and-building-regulations/ldp/evidence-monitoring-and-information/local-housing-market-assessment-need-demand-and-affordability-in-denbighshire.pdf

❭ **Rhondda Cynon Taf County Borough Council**
Local Housing Market Assessment 2017/18 -
2022/23
Data accessed August 2020
https://www.rctcbc.gov.uk/EN/Resident/Housing/RelatedDocuments/LocalHousingMarket AssessmentSummaryReport.pdf

❭ **Geofabrik**
Open Street Map Data
Data accessed August 2020
https://www.geofabrik.de/data/download.html

❭ **Ordnance Survey**
Open Data
Data accessed August 2020
https://osdatahub.os.uk/downloads/open

❭ **Office for National Statistics**
UK Census 2011 Data
Data accessed August 2020
https://www.nomisweb.co.uk/census/2011

❭ **Oxford Consultants for Social Inclusions (OCSI)/Office for National Statistics (ONS)/Census 2011**
At risk jobs (as a result of COVID-19) by location of job (using methodology developed by RSA)
Data accessed August 2020

Read the first two white papers from this series below:

❭ **Unlocking brownfield land**
https://edaroth.co.uk/wp-content/uploads/2020/01/EDAROTH-Whitepaper-January-2020.pdf

❭ **Unlocking the Greater Manchester housing challenge**
https://edaroth.co.uk/wp-content/uploads/2020/06/EDAROTH-Whitepaper-2-June2020.pdf

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