



TAI

2025



Breakout - The financial landscape: Is 20,000 beyond our reach?

Sesiwn Fach - Y dirwedd ariannol: A yw 20,000 y tu hwnt i'n cyrraedd?



Gareth Leech
**Chair,
Housing
Futures Cymru**



Mark Hand
**Director of
Wales,
Northern
Ireland and
Planning Aid
England, Royal
Town Planning
Institute**



Victoria Bolton
**Director of
development &
regeneration, United
Welsh**



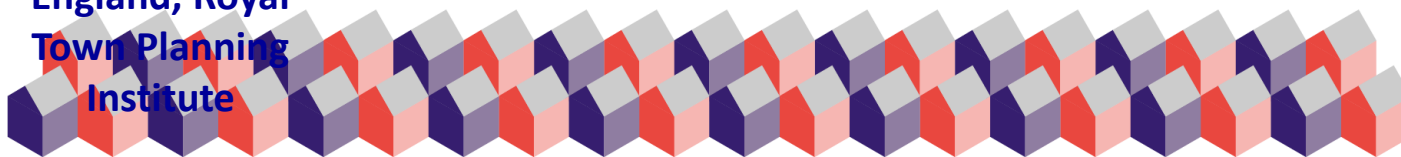
David Ward
**Chief executive,
Tirion Homes**



Stuart Fitzgerald
**Deputy director,
Homes & Places,
Welsh Government**



Steve Cranston
**Tai'r Cyd Project
Lead**





RTPI Cymru

Royal Town Planning Institute
Sefydliad Cynllunio Trefol Brenhinol

Is 20,000 beyond our reach?

What are the barriers to delivery and how can they be overcome?

Mark Hand MRTPI

RTPI Director of Wales, Northern Ireland and Planning Aid England



#CIHTAI25

Capacity

- Local Planning Authorities
- Consultees
 - Ecology
 - Highways
 - NRW...

50% cuts to
planning service
budgets 2009-2019
(Audit Wales)

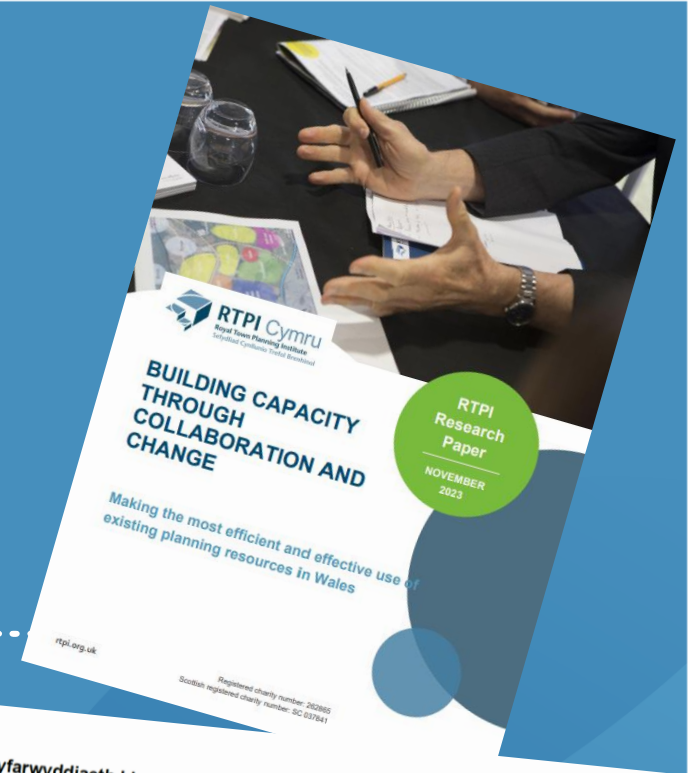
Capacity

- Local Planning Authorities
- Consultees
 - Ecology
 - Highways
 - NRW...

Between 2013-
2020, a quarter of
planners left the
public sector
(RTPI)

Capacity

- Increase application fees
- RTPI evidence gathering on resources
- £5m investment in NRW
- Grow the pipeline of planners



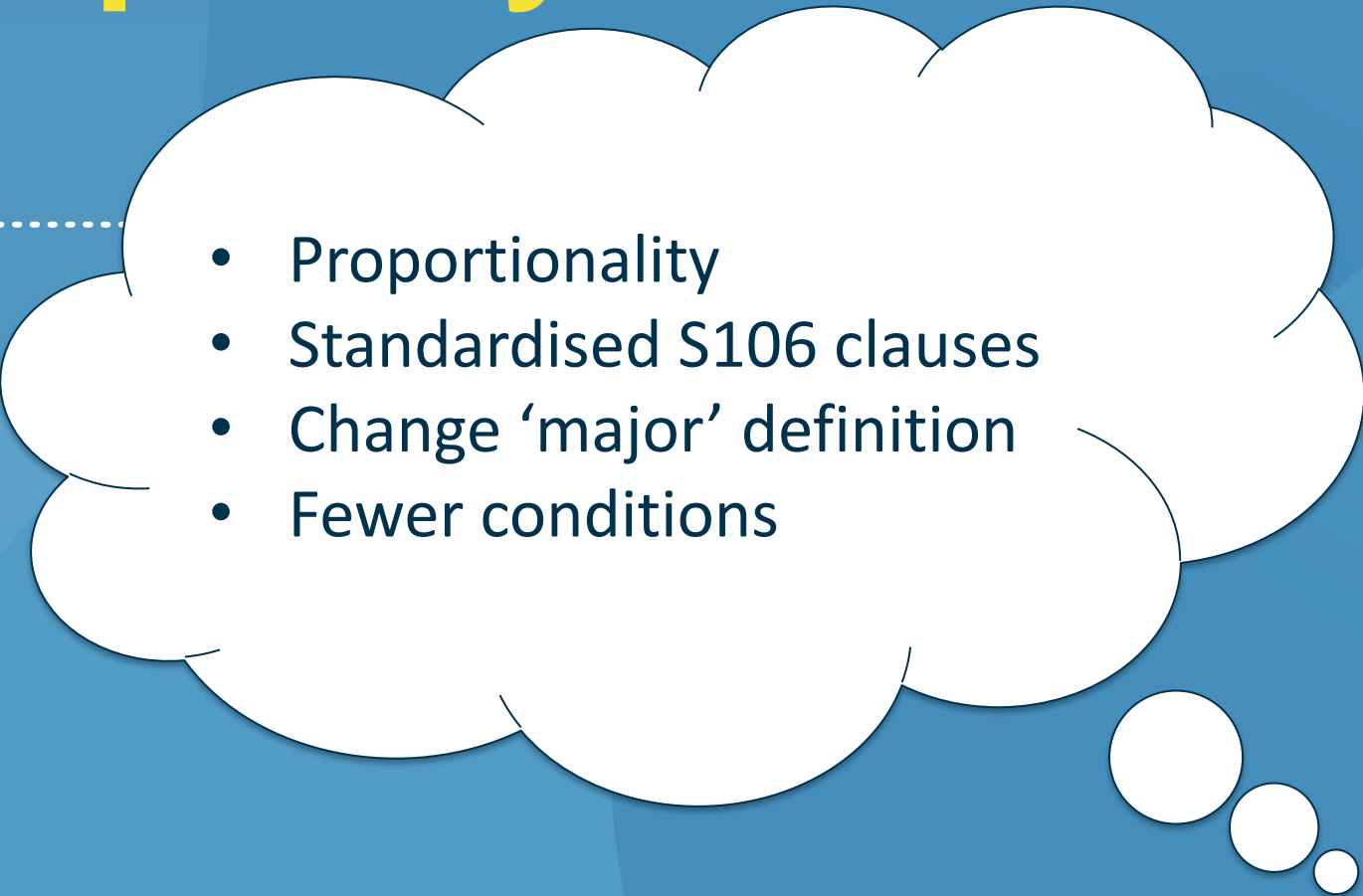
Complexity

- Nutrient neutrality
- SUDs / SAB approval
- GI Statements
- Ecology surveys
- S106 agreements
- Planning conditions

The list of planning considerations to be balanced keeps increasing, but often for good reason

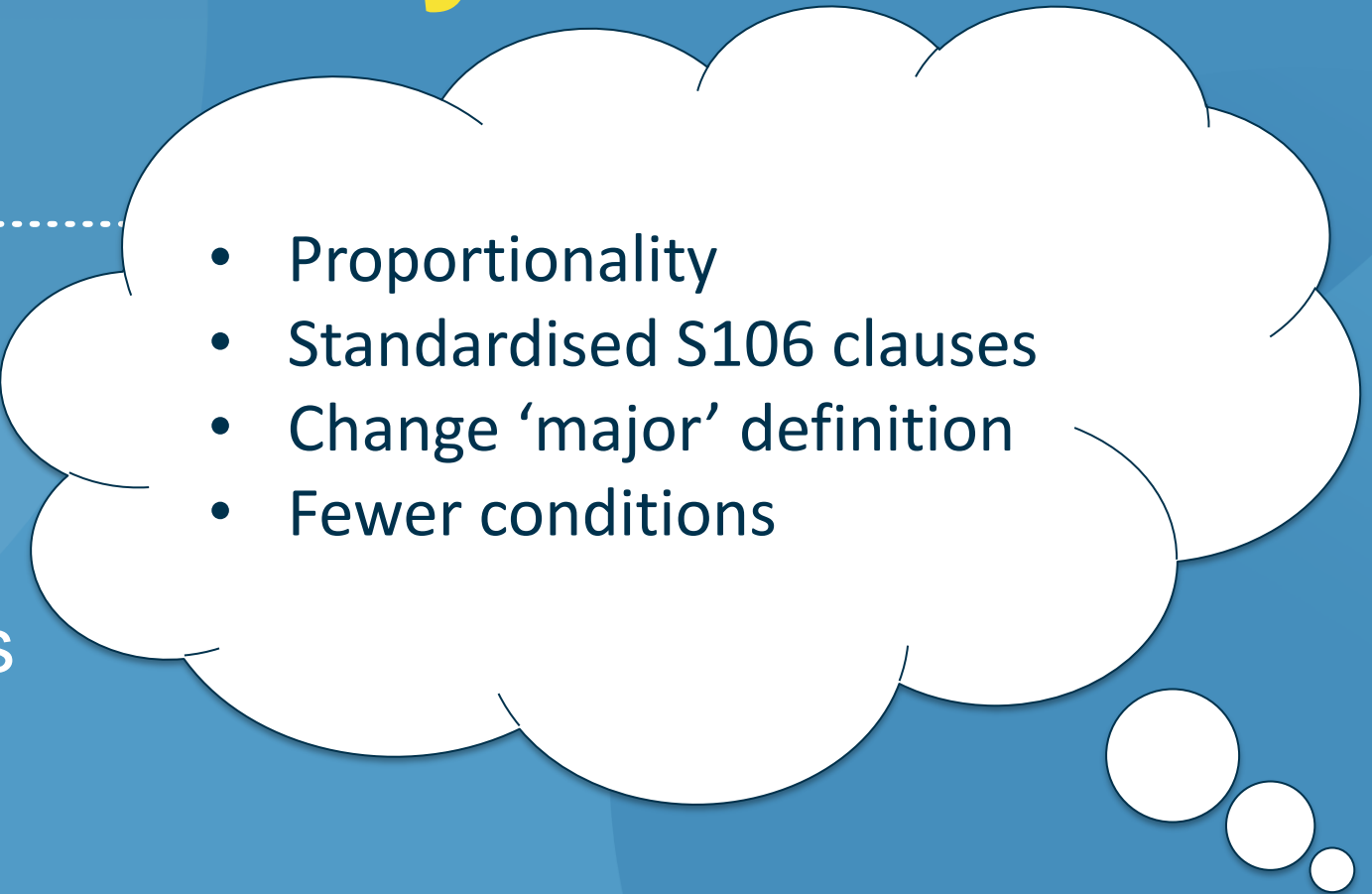
Complexity

- Nutrient neutrality
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- GI Statements
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- S106 agreements
- Planning conditions

- 
- Proportionality
 - Standardised S106 clauses
 - Change 'major' definition
 - Fewer conditions

Certainty

- Lack of certainty from decision-makers
- Plan-led or Plan-only?
- Frontloading LDPs has excluded SMEs

- 
- Proportionality
 - Standardised S106 clauses
 - Change 'major' definition
 - Fewer conditions



RTPI Cymru
Royal Town Planning Institute
Sefydliad Cynllunio Trefol Brenhinol

One ask of the Welsh Government?

Increase land supply

- Support ambitious Plans
- Allow additional sites if Plans are not delivering
- Could help SMEs engage

Mark Hand MRTPI

mark.hand@rtpi.org.uk 07725798383



#CIHTAI25

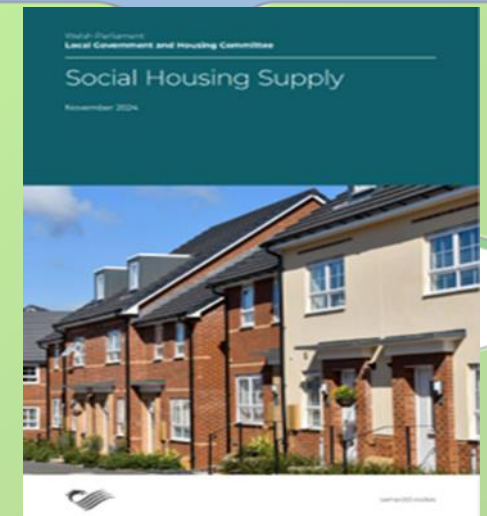
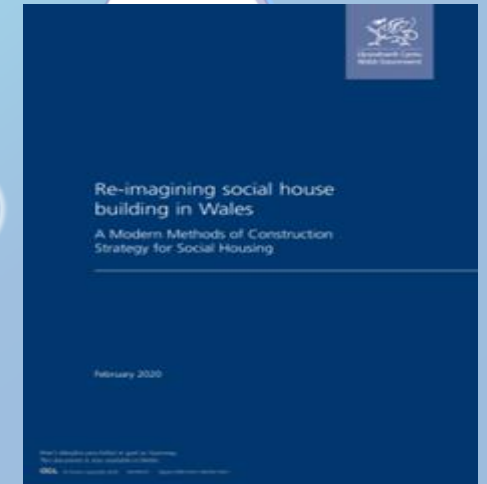
IS 20,000 beyond our reach?

Victoria Bolton MRICS
Director of Development &
Regeneration

United Welsh



- Better Homes, Better Wales, Better World: July 2019
- Re-imagining Social House Building in Wales: A Modern Methods of Construction Strategy: February 2020
- Social Housing Supply: November 2024
- Tai Ar y Cyd: January 2025



Key Opportunities

Government Support and Funding:

- Social Housing Grant
- TACP
- Low Interest Loans

Key Opportunities

Innovative Construction Methods:

- MMC
- Celtic Offsite
- Further Investment

Key Opportunities

Collaborative Initiatives:

- Partnerships
- Tai Ar Y Cyd
- Public Private Partnerships

Key Challenges

- **Planning**

- *Complex*
- *Slow*

- **Financial Constraints**

- *Inflation and Construction costs*
- *Supply chain*

- **Environmental Regulations**

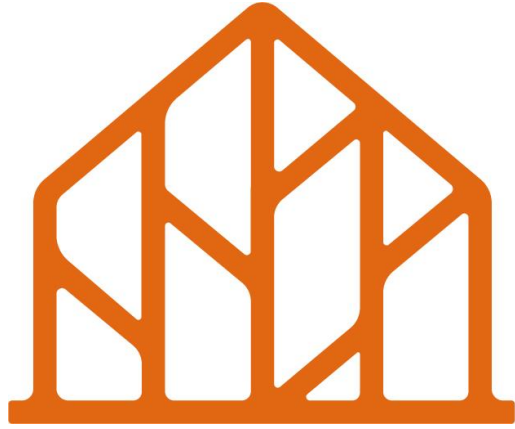
- *Biodiversity Net Gain*
- *Flood Risk*



Conclusion:

- *Opportunities & Challenges*
- *Innovation & Collaboration*
- *Shared Solutions*





TAI AR Y CYD

Collaboration, Aggregation and Standardisation



**BUILDING THE
FUTURE OF
AFFORDABLE,
SUSTAINABLE
HOUSING**

A collaborative vision by 23 social landlords committed
to creating low carbon, timber-based homes in Wales.



Steve Cranston Tai ar y Cyd Project Lead 3 April 2025



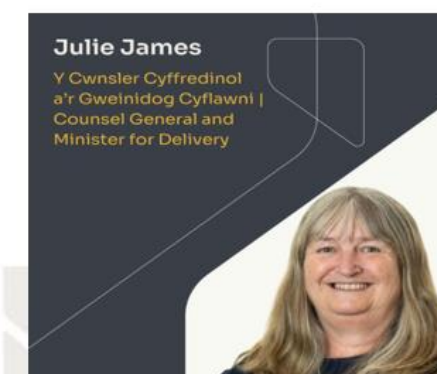
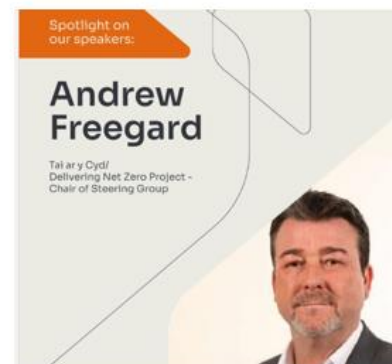
DELIVERING NET ZERO PROJECT LAUNCH

Wednesday, January 15, 2025

09:15am: Registration opens

4pm: Conference closes

IQ Campus University of Wales, Swansea Waterfront,
Trinity Waterfront, Swansea, SA1 8EW



We launched — 200+ in Swansea 130 via livestream



If you want to go fast – go alone
If you want to go further – go together

African proverb

Tai ar y Cyd - Collaboration



Collaboration, Aggregation and Standardisation

- Prototyping – Use the pattern book
- Pipeline – Visibility aggregation potential
- Procurement - Shift from project to aggregated portfolio approaches
- People – Lived experience workstream – post occupancy framework

Prototyping Has Started

- Cardiff Council
- Beacon/Coastal
- Denbighshire Council
- Flintshire Council
- Swansea Council
- Tai Tarian
- Trivallis
- United Welsh
- Vale of Glamorgan Council
- Cwmpas - Community Housing Projects

Tai ar y Cyd documents



Pattern book of homes



Performance specification

400 homes



Design guide



Pattern book details

Communities of Practice

- Safe space to learn and share
- Accelerated learning - especially from mistakes and successes
- Increased levels of trust - essential for collaboration
- What works – lets do more
- What does not work - identify solutions
- If systemic barriers - make policy recommendations

Increased Confidence

Feedback from Offsite Manufacturers

What they said to Wood Knowledge Wales about social landlords in 2022..... -

- 'You involve us in your schemes far too late'
- 'Every scheme we do for you is bespoke' opportunities to standardise/ repeat are very limited'
- 'You talk about your pipeline - we can't see it' 'its opaque'

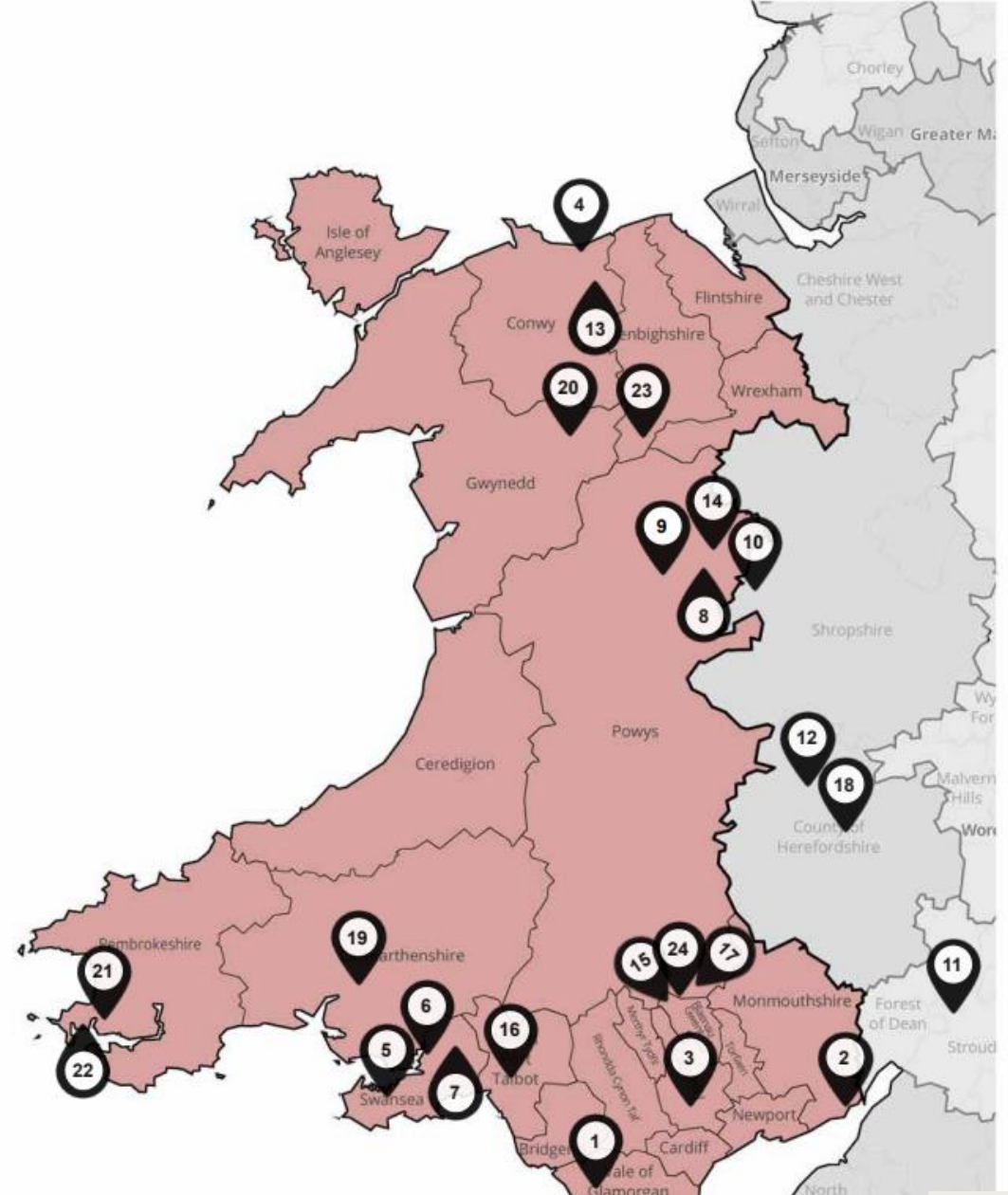


Timber first, fabric first

Supply chain engagement

Mapping of existing timber frame manufacturing sites has been undertaken to establish the potential supply chain locations that could serve construction of the Tai ar y Cyd Pattern Book homes.

- | | |
|-----------------------------------|-----------------------------------|
| 1. Ashdown Construction Group | 13. PK Joinery |
| 2. Benfield ATT | 14. PYC Construction |
| 3. Celtic Offsite | 15. Roe Timber Frame Ltd |
| 4. Creating Enterprise | 16. SO Modular |
| 5. Down to Earth Project | 17. Target Timber Systems |
| 6. Fforest Timber Engineering Ltd | 18. Taylor Lane Timber Frame Ltd |
| 7. FREDs Timber frame Ltd | 19. TRJ Construction Ltd |
| 8. Huws Gray Timber Engineering | 20. Williams Homes Bala Ltd |
| 9. Kenton Jones | 21. JSI Timber Frame |
| 10. Lowfield Timber Frames Ltd | 22. Manderwood Timber Engineering |
| 11. MBC Timber Frame UK Ltd | 23. Cambrica Timber Frames |
| 12. Merlin Timber Frame Ltd | 24. Crendon Timber Frame |



Feedback from Contractors and Supply Chain

‘the industry is chaotic – everyone is doing their own thing’

- We embrace standardisation agenda
- Need to see clear performance standards
- Want consistent house designs
- Want pipeline visibility
- Are commitment to learning and improving house designs
- Want a level playing field – transparency on pricing



Mark Farmer

CEO of Cast Consultancy



Tai Ar Y Cyd Aligns To A New Phase of Residential MMC Market Maturity Which Should De-Risk Deliverability

Setting The ‘**Rules Of The Game**’ Is Important To Avoid Ambiguity & Allow **Learning Curves Through Repetition** – Has Both A Manufacturing Economy & Site Skills Improvement Impact

10 Points of Failure & Obstacles For Homebuilding Production Modernisation



There Are Multiple Barriers Impeding Housebuilding Modernisation But **This Initiative Can Act As A Real Trailblazer For Wider Change**

This Initiative Addresses At Least 4 of 10 Barriers & Creates The Platform To Address The Balance



Standardisation and Placemaking

Sample street elevations
Showing varied brick finishes



Tai ar y Cyd

PLACEMAKING
ONE HOUSE-TYPE - MANY POSSIBILITIES

Materials

| 1. | 2. | 1. | 2. | 1. | 2. | 3. | 1. | 2. |
|------------------------------------------|------------------------------|-------|------------------------------|------------|--------------|--------------------------|--------------|--------------------------|
| Standard Red Brick and Brick Protrusions | Grey Powder Coated Aluminium | Stone | Rose Gold Anodized Aluminium | Buff Brick | Timber Panel | Green Anodized Aluminium | Timber Panel | Black Anodized Aluminium |

Coastal locations provide the opportunity to respond to the landscape and scale of the waterfront

Suburban developments can create places of a smaller scale than that of an urban context.

Urban sites that offer a larger scale can have historical buildings that add to the contextual palette.

Artist's impression
Showing timber cladding and feature entrances



Challenges We Will Tackle Together

- Viability/Cost Issues
- Quality assurance around AECB/Carbon Lite + Passivhaus Standards
- Placemaking and Pattern Books
- Welsh timber
- Skills
- Pipeline Aggregation
- Procurement

More information

www.taiarycyd.cymru

LinkedIn - Tai ar y Cyd

Steve Cranston steve.cranston@gov.wales

07771942289

Catrin Sneade catrin.sneade@gov.wales



Rolling out the Tirion model

www.tirionhomes.co.uk

The Tirion Model

Pre-construction

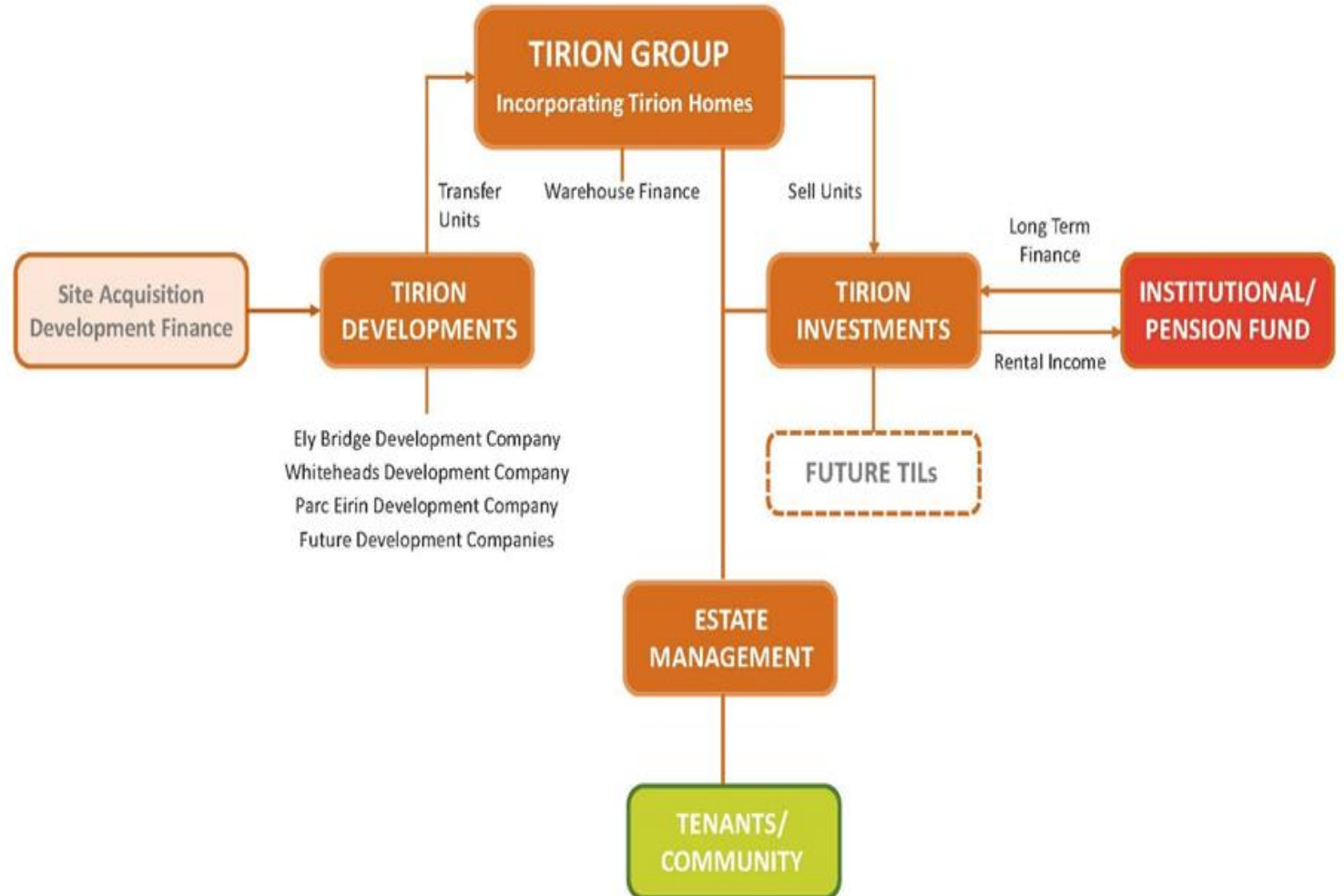
Loan finance
Planning / Statutory approvals
Remediation

Construction

Finance – land sales
Guarantees
Warehouse

Long-term

Re-finance M&G – 50 years
Manage & maintain



Tirion Projects – The Mill

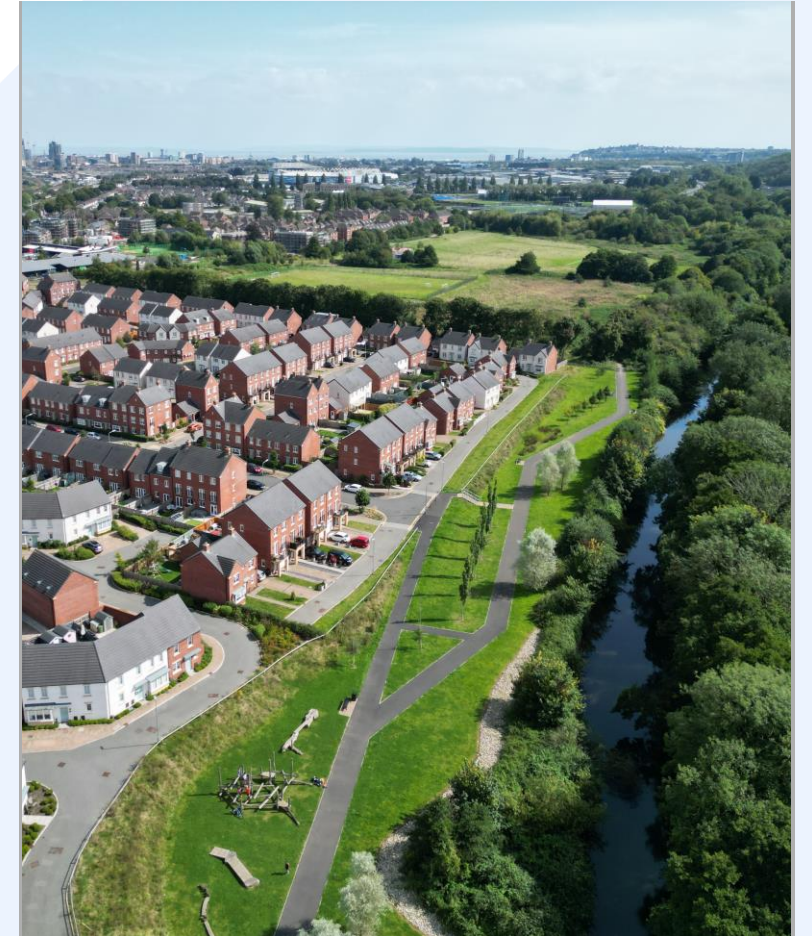
Tenure mix:

- 75 - social rent
- 125 - LHA
- 199 - Intermediate Rent
- 358 - private sale - Lovell

Total M&G investment circa £63m

No SHG but supported by WG loan finance

Multiple industry awards



Tirion Projects – Royal Victoria Court

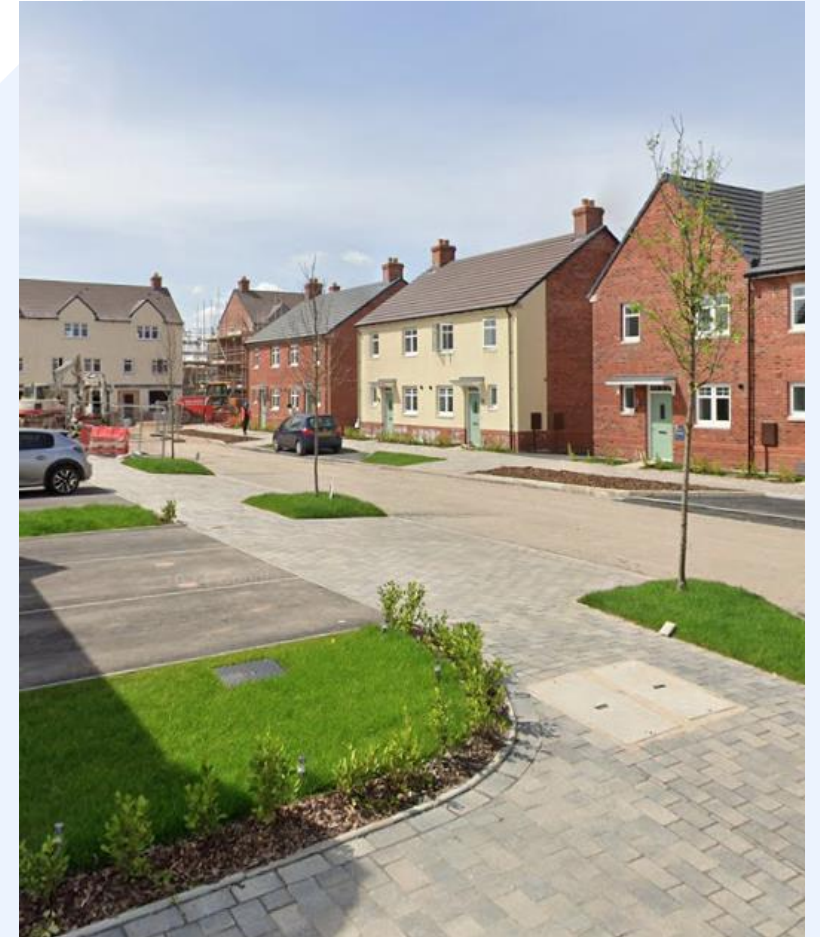
Tenure mix:

- 264 – private sale
- 184 - Intermediate Rent
- 30 - Older Persons - LHA
- 20 - Social Rent
- 30 - LCHO

Total M&G investment circa £33m

No SHG but supported by WG loan finance and a guarantee

Managed by Tirion



Tirion Projects – Parc Eirin

Tenure mix:

- 52 - Private sale
- 45 - LCHO
- 30 - Social Rent
- 88 - Intermediate Rent
- Net-zero infrastructure all units

Total M&G investment circa £13m

No SHG – but energy infrastructure supported by IHP grant

Managed by Tirion



Lessons learnt

Barriers

Planning / Statutory approvals
Access to construction finance
Sector capacity

Success factors – Maximising Value

Innovative finance – loans /guarantees/institutional
Tenure blind design & focus on placemaking
Community engagement
Tenant and estate management

Opportunities – Accelerating Delivery

Institutional investor appetite
Net-zero infrastructure investors
Public / private partnership delivery models
Portfolio of projects to guarantee pipeline



Unlocking Stalled Regeneration Sites

Benefits of a portfolio approach:

- Maximise private sector investment
- MMC order book – improve efficiency
- Skills – contractor investment
- Sector capacity – support SMEs
- Affordable housing – mixed tenure
- Private housing integration community cohesion
- Social facilities – supported by scale
- Sustainable locations / transport



12 x The Mill

Outcomes

- 900 social homes
- 1500 intermediate homes
- 2000 discounted rent homes
- 500 PRS homes
- 4200 private homes
- £750m direct institutional investment
- £200m saved in SHG
- Roll out of viable net-zero infrastructure
- Major local economic benefits during construction phases





220 The Boulevard,
Canton, Cardiff CF11 8GF

T: 02922 337267

info@tirionhomes.co.uk

www.tirionhomes.co.uk