



Cymru

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2026

DEVELOPMENT SEMINAR

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Welcome to the Development Seminar 2026

Gemma Clissett
Partnerships director - South Wales
Lovell



Joint Ventures: Collaborating to Unlock Development

Gemma Clissett

Partnerships director - South Wales
Lovell

David Jacques

Assistant director of development and regeneration
Cardiff Council

Andrew Freegard

Operational Manager - Housing Development
Vales of Glamorgan County Borough Council

Neil Barber

Executive director of property and investment
Codi Group



Do We Need a Home's England-type Development Body in Wales?

Richard Mann
Group CEO
United Welsh Housing Association

Gemma Clissett
Partnerships director - South Wales
Lovell

Jocelyne Flemming
Lead - Scotland Policy and Public Affairs and Policy Research
Chartered Institute of Building



Do we need a Homes England Development Body in Wales



Richard Mann – CEO United Welsh Housing Association



Has Homes England been a success?

I asked Co- Pilot

- Established in 2018, England's national agency for housing and regeneration
- Primary objective: to boost housing availability in areas where the market does not adequately deliver
- Increase housing supply, especially affordable homes
- Unlock land and fund enabling infrastructure
- Support regeneration and placemaking
- Act counter-cyclically in weak markets



Has it succeeded

- Has supported c.50% of all new affordable homes outside London
- Over **270,000** affordable homes supported in the last decade
- Provider of stability for housing associations during downturns
- Unlocks large, complex sites the market will not deliver alone
- Major role in brownfield remediation and strategic sites



Didn't we have one once ? (WDA)



Was its abolition evidence of failure?

Most independent commentators say no.

- The WDA was successful at what it was primarily designed to do: attract investment, create jobs and regenerate post industrial Wales
- The WDA was abolished in 2006 and absorbed into the Welsh Government as part of a political decision to centralise policy delivery, not because it was demonstrably ineffective.
- Senior economists and former policymakers have since described this as a mistake, with some calling it **“the worst policy decision of the past 20 years”** in Welsh economic development

Our current take on it

(are we assuming process and not focusing on outcome)

united
welsh

Recommendation 5

The Committee recommends that the Welsh Government establishes a national development corporation to lead on delivery of large-scale strategic sites and to support alignment of housing and regeneration efforts. As part of this it should review the future role of Unnos and whether it could fulfil the function of a national development corporation and land agency. The Welsh Government should consider a development corporation's potential functions, powers and duties in relation to delivering new towns, urban extensions and rural development; and any other necessary functions.

Response: Reject

In response to a recommendation of the Affordable Housing Supply Review in 2019 Welsh Government established a Land Division to unlock the potential of public assets, stimulate a more active approach to using and developing land in the public interest, help improve land supply, facilitate land assembly and help unblock stalled, vacant and derelict land in public ownership.



The Local Government and Housing Committee published their report on 20 November 2024, following their inquiry into Social Housing. The report includes 17 recommendations covering a wide range of topics within Social Housing. This document provides responses to those recommendations.

What if

Structured relationship with Gov

(not necessarily a Quango)

Based on an actual development site (WG owned).

550 New Homes located in South Wales (Semi Rural Location) on 1 site

Cooperation Agreement between WG and Development Consortia made up of 1 Local Authority and 2 RSL's

All Development Surpluses to be re-invested into Optimised Retrofit of existing Homes.

Scheme design to meet high standards supported by DCFW

Market Land Value based on open model – only fix would be Gross Margin.



The Numbers

- 550 new MMC EPC A homes
- Market Land Value for Public Purse (up to **£13.2m Capital Receipt** for reinvestment into new site assembly.
- Development Margin reinvested into ORP (**£23m**)
 - Up to **3000 Solar PV / Battery systems**.
 - or; increase UP TO 1600 existing homes to EPC A
- Employment in MMC; recycled £; foundational economy; keep it Welsh... I can go on....



Questions ?



Key Project Workstreams Delivering Development

Mark Harris

Planning and policy advisor Wales
Homes Builders Federation

Gemma Clissett

Partnerships director - South Wales
Lovell

Mark Hand

Director of Wales
RTPI



How can we successfully deliver housing development at scale?

CIH Cymru Development Seminar 2026

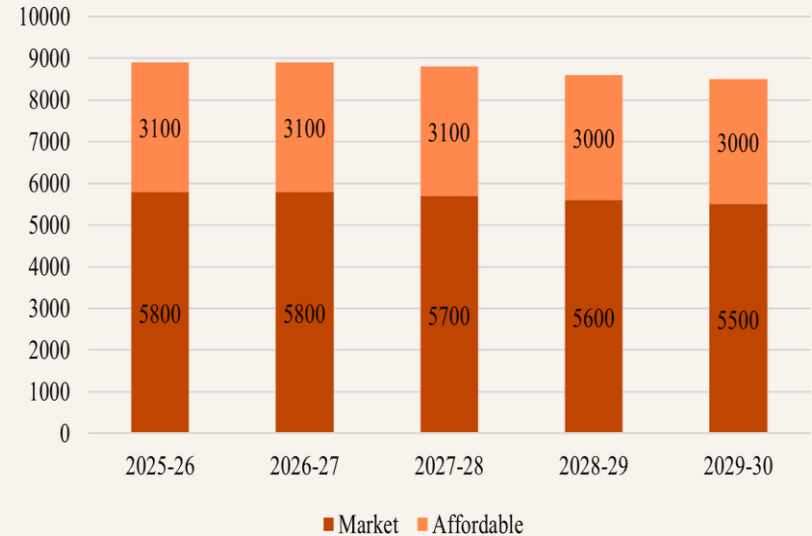


Housing Need

The latest figures Feb 2026, show that:

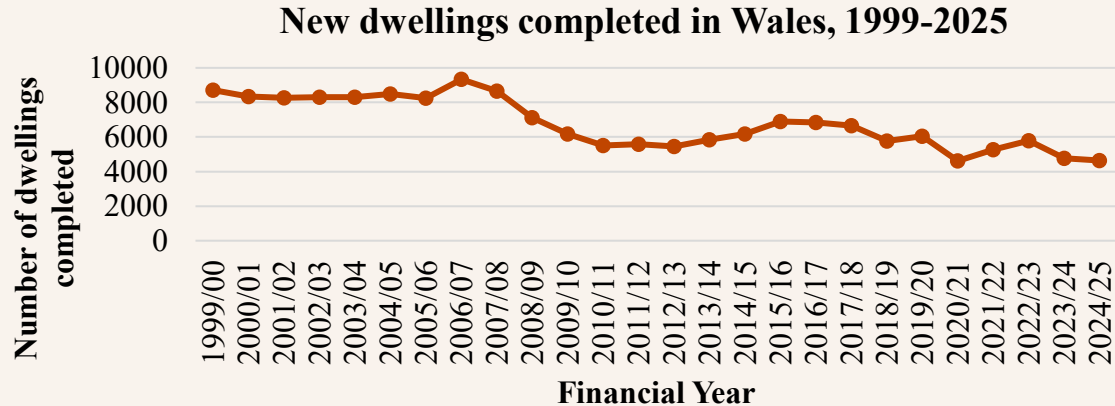
- There is existing unmet need of 9,400 affordable homes in Wales – a 64% increase from 2019.
- Around 8,700 new homes are estimated to be needed every year up to 2030 to meet newly arising need, based on household formation and population growth projections.
- Of this newly arising need, around 65% (approx. 5,700 homes per year) is estimated to be for market housing, and 35% (approx. 3,000 homes per year) for affordable housing.

Estimate of new housing need, 2025 to 2030



Housing supply

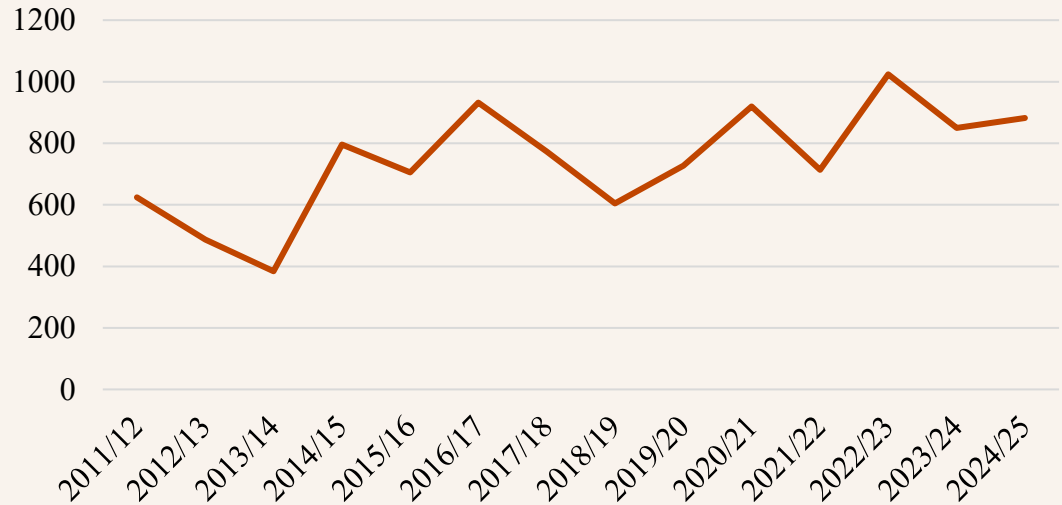
- There were around 4,600 dwellings completed in Wales in 2024/25, **down 3%** on 2023/24.
- The average over the last 5 years is 5,100 dwellings per annum.
- This is **50% below** the 2006/07 peak and the second lowest year of delivery on record.
- 64% of all new completed dwellings in 2024/25 were in South East Wales, 20% in North Wales and 20% in Mid and South West Wales.



Affordable Housing

- In 2024/25, 3,643 additional affordable housing units were delivered across Wales, a 12% increase from the previous year.
- 24% of all additional affordable housing in Wales was delivered by the private sector in 2024/25.
- 882 affordable housing units were delivered through Section 106 agreements in 2024/25, up 3%.

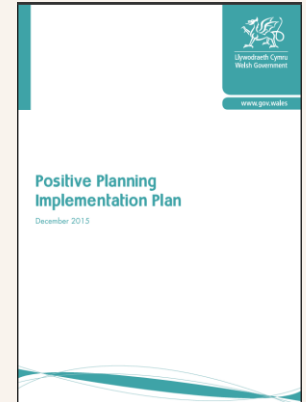
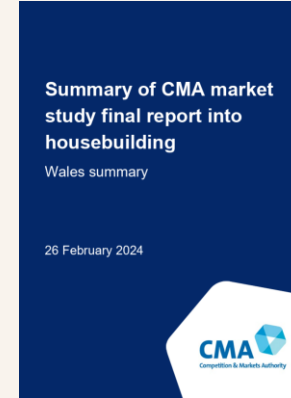
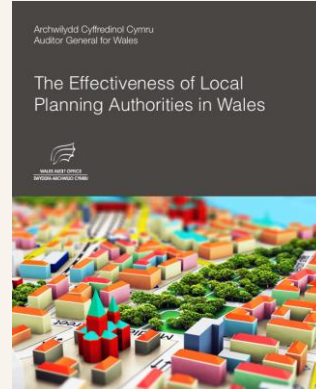
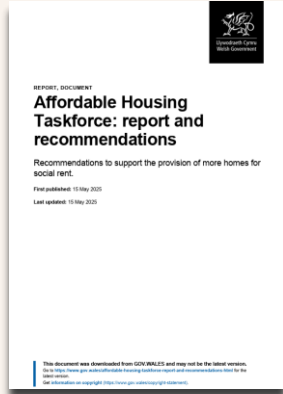
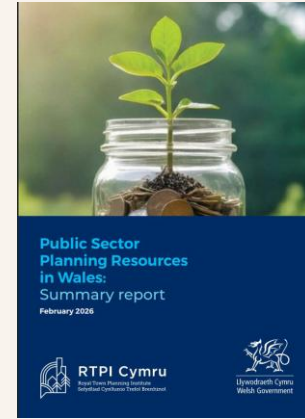
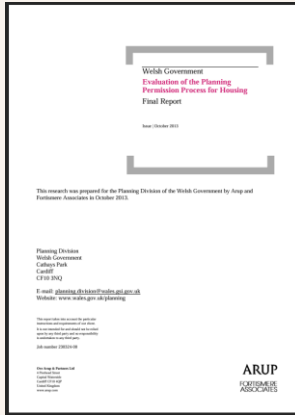
Number of affordable housing units delivered through planning agreements



The Reports

Lots of Reports.

Wide range of findings
and recommendations.



Key Findings

- Public Sector Planning Resources in Wales RTPI Cymru Feb 2026
 - A sector that has **operated under significant strain** for a prolonged period and continues to face challenges.
- Welsh Government Affordable Housing Taskforce May 2025
 - Many problems experienced by developers reflect the fact that the **system is overloaded**.
- Audit Wales – Affordable Housing September 2024.
 - The Welsh Government should work with local government partners to develop sustainable solutions to the **capacity and delivery constraints** in local government planning services.
- CMA market study housebuilding Wales summary Feb 2024
 - We have found that the planning system is exerting a **significant downward pressure on the overall number of planning permissions being granted** across Great Britain and within Wales.
 - (a) Lack of predictability;
 - (b) Length, cost, and complexity of the planning process; and
 - (c) Insufficient clarity, consistency and strength of LPA targets, objectives, and incentives to meet housing need.
- The Effectiveness of Local Planning Authorities in Wales – Auditor General for Wales. June 2019 Report
 - local planning authorities have seen a **significant reduction in capacity** and struggle to deliver their statutory responsibilities.

Key Challenges

- Lack of planning resources – Following Welsh Government consultation planning fees increased, some additional funding to NRW. – **Slowing down development.**
- Delays in updating Local Development Plans – A plan led system needs up to date plans to operate effectively, developers need them to make longer term business decisions. -**Shortage of land**
- Very slow progress on Strategic Development Plans – definition of the proposed green belt areas making it harder to identify site to allocate in the LDP's. – **Uncertainty future pipeline**
- Delays caused by the SAB process and high commuted sums – affect on scheme **Viability/ delivery timescales.**
- Fewer large sites allocated in LDP's make it difficult for SME's to develop allocated sites.- **Shortage of providers**

All of these have a disproportionate impact on SME builders.

Policy Background

Future Wales The National Plan

Our planning system is development plan led.

Development Plan Manual 3

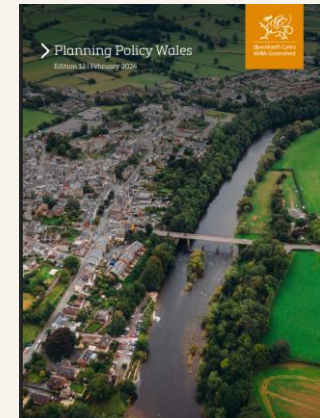
As plans continue to evolve the **Welsh Government** is seeking to reinforce the plan-led system..

It is essential that LDPs are kept up-to-date to ensure effective and consistent planning decisions..

Planning Policy Wales 12

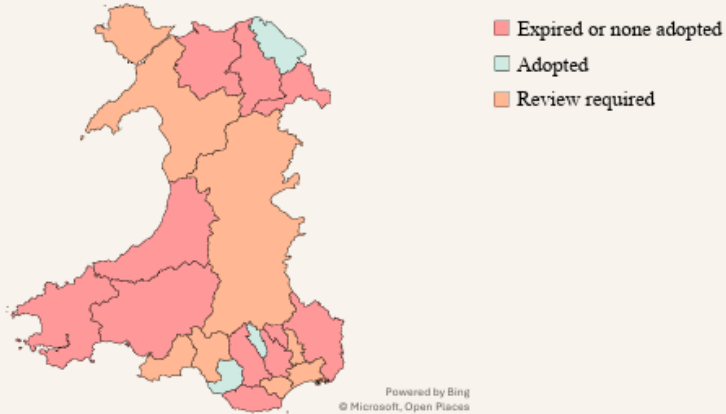
Sets out how the planning system at a national, regional and local level can assist in delivering through Strategic Development Plans (SDPs) and Local Development Plans (LDPs).

Loss of TAN1 in 2020



LDP Position

LDP status, Wales local authorities



WG letter Sept 2020: Plans adopted prior to 4 January 2016 will remain the LDP for determining planning applications until replaced by a further LDP. For those LDPs adopted after 4 January 2016, the plan will cease to be the LDP on expiry of the period specified in the plan.

Current Plans progress

4 plans currently adopted (within last 4 years).

12 plans are time expired adopted pre Jan 2016.

Wrexham LDP adopted and now withdrawn.

2026 examinations for Cardiff and Monmouth (subject to phosphate issues)

West Wales plans progress affected by marine nitrates.

Reliance on larger sites

Example - Bridgend LDP

Total Housing Provision (2018-2033): 8,628

4172 dwellings on 5 strategic sites 48% of the plans provision.

Only 10 allocated sites

Smallest site 102 units

COM1: Housing Allocations

In order to deliver the housing requirement identified in SP6 residential development in the period up to 2033:

Site Ref	Site Name	Growth Area	Total Units in Plan Period
Strategic Sites			
SP2(1)	Porthcawl Waterfront	Porthcawl	780
SP2(2)	Land South of Bridgend	Bridgend	788
SP2(3)	Land West of Bridgend	Bridgend	830
SP2(4)	Land East of Pencoed	Pencoed	804
SP2(5)	Land East of Pyle	Pyle, Kenfig Hill and North Cornelly	970
Housing Allocations			
COM1(1)	Craig y Parcau	Bridgend	108
COM1(2)	Land South East of Pont Rhyd-y-cyff	Maesteg and the Llynfi Valley	140
COM1(3)	Land South of Pont Rhyd-y-cyff	Maesteg and the Llynfi Valley	102
COM1(4)	Land South West of Pont Rhyd-y-cyff	Maesteg and the Llynfi Valley	130
COM1(5)	Former Cooper Standard Site, Ewenny Road	Maesteg and the Llynfi Valley	205

LDP ADOPTION TIMESCALES

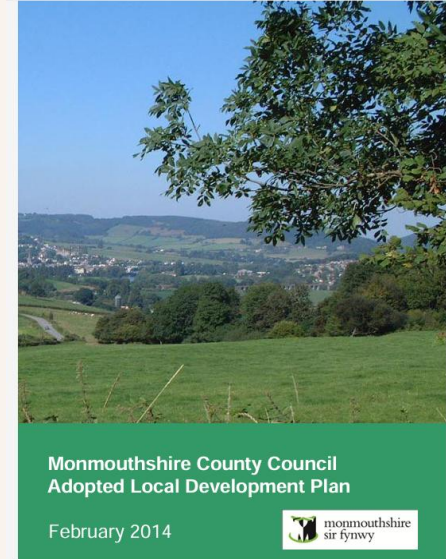
Example - Monmouth LDP

Local Development Plan 2011 – 2021 adopted 2014.

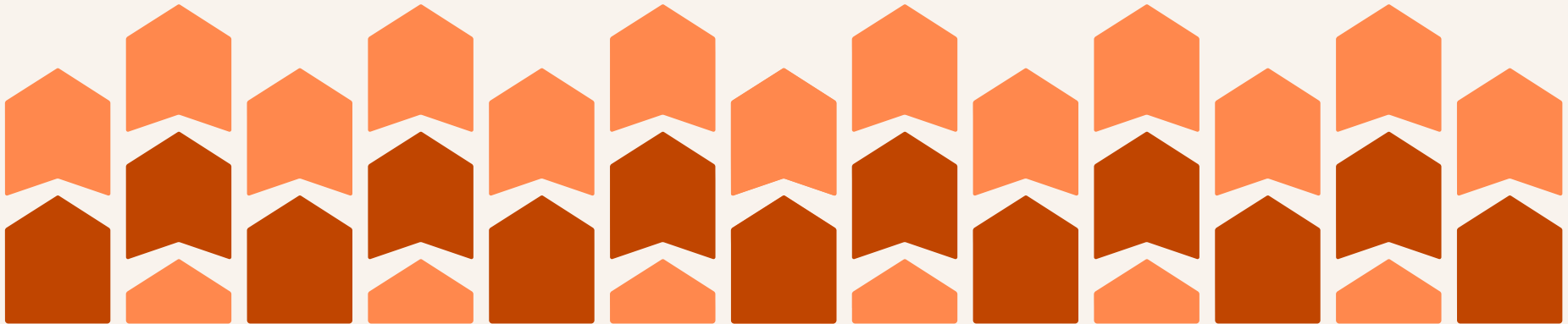
RLDP – 2018-2033

Started in 2018 Inquiry 2026 (start delayed due to Phosphates)
Adoption 2026/27

Eight years to complete a process which should take 3-4 years..



Questions ?

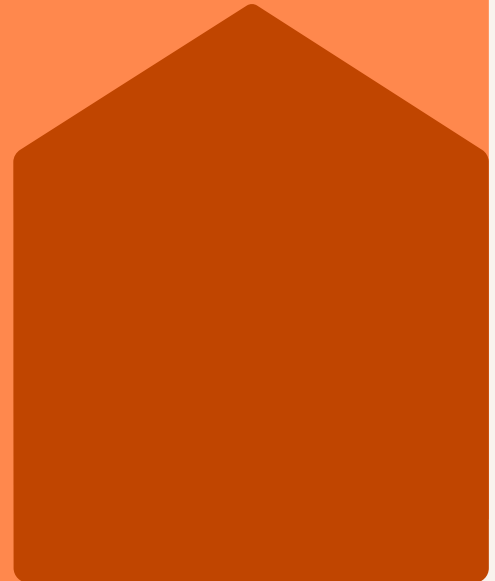




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Royal Town Planning Institute
Sefydliad Cynllunio Trefol Brenhinol

Key project workstreams delivering development

Tai 2026

Mark Hand MRTPI CIHM mark.hand@rtpi.org.uk

27 April 2026



The role of planning in delivery



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Resources

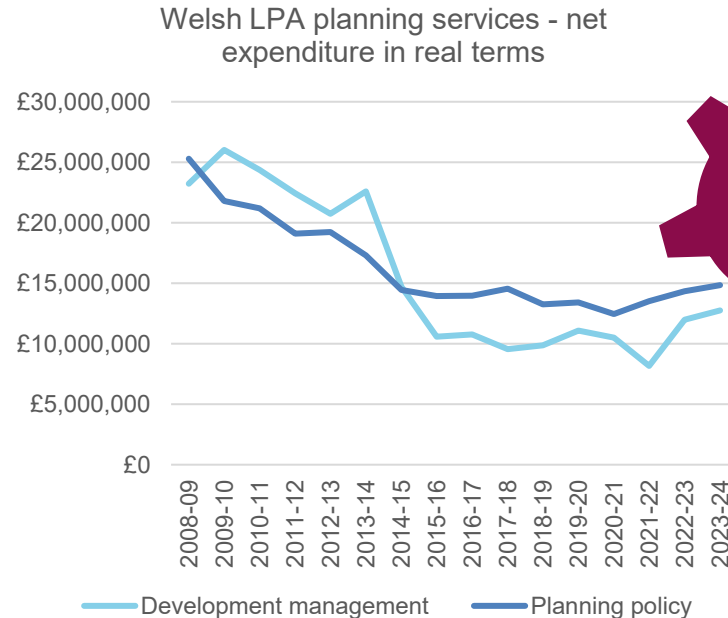
Real term net LPA expenditure decreased by 43% (£21m) between 2009 and 2024;

At May 2025, 73% of LPAs had vacant planning posts. 50% had multiple vacancies;

WG's Planning Division reduced in size from 60 officers in 2015 to 33 officers in 2024;

17% (95) public sector planners are aged 55+;

42% (234) public sector planners are aged 45+.



In total, the short-term recruitment need is 161 extra planners, 15 specialist officers and five business support officers:

Recruitment and retention strategy

Solving this requires reinvestment of increased planning fee income. This needs:

- Political will;
- CEx and Chief Finance Officer will;
- Public reporting of income and reinvestment;
- You as applicants to hold their feet to the fire.



Consultees

Planners



The vision:

- Plan-led, but not 'Plan-only' system
- Ambitious rather than 'deliverable' (aka 'safe')?
- Infrastructure secured
- Range of site sizes
- Community engaged and supportive
- Quicker



Fix the system or bypass it?



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Is relaxation of regulation the answer? More 'permitted development'?



tcpa

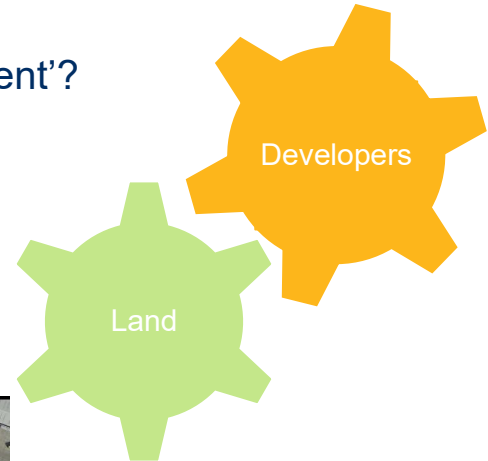
[These are Homes photobook](#)

Fix the system or bypass it?



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Is relaxation of regulation the answer? More 'permitted development'?



tcpa

These are Homes photobook

Intervention



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WDA2?

Homes England?

Something else?



Certainty and truth

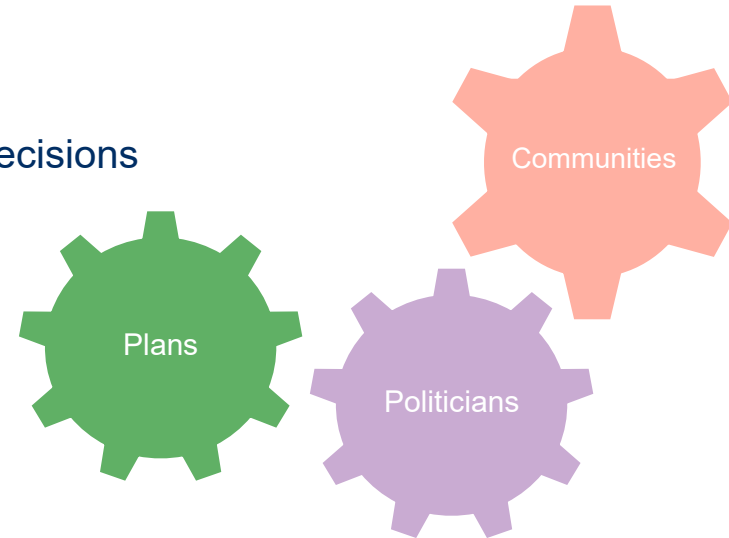
Senedd Cymru elections / by elections? / 2027 local elections

Two issues:

- Community opposition = political opposition = uncertainty
- No incentive to adopt an LDP or make difficult planning decisions

Solutions?

- Better engagement at the right time
- De-politicising planning?
- Spreading truth – e.g. myth-busting about AH allocations



Manifestos 2026

- Conservatives –
 - Introduce incentives for local authorities to make timely planning decisions and impose penalties on developers who fail to deliver housing projects with existing planning permission.
 - Give town and community councils a greater say in the planning process.
- Green Party –
 - Properly resource local authorities to deliver housing and infrastructure, including appointing a statutory Chief Planner in every authority.
 - Strengthen public participation in planning, ‘so communities have a real voice in Local Development Plans and major developments.’
 - A National Housing Developer: to coordinate funding, work with local authorities and housing associations, and develop new social housing at scale
- Labour –
 - ‘Make Wales the fastest nation in the UK to get planning permission’, as well as introducing degree apprenticeships in planning.
 - Establish a new National Housing Taskforce to reform the planning system and contracting, and drive faster adoption of modern methods of construction.

Liberal Democrats –

- Introducing planning rules encouraging town-centre residential development.

Plaid Cymru –

- Reform consultation processes so communities have real power to influence local development plans.
- Establish Unnos – a new national development body and social housing enabler.
- Reduce the complexity and bureaucracy of planning processes, providing greater clarity and firmer guarantees on consenting timelines.
- Prioritise a community-centred approach to planning that protects and strengthens local leadership in setting planning priorities.

Reform –

- Amend Planning Policy Wales and relevant legislation to impose clear time limits, limit repeat consultations, and expedite decisions.
- Increase housing delivery by imposing firm decision deadlines on councils, strengthening the presumption in favour of development where supply is inadequate, and allowing modest, well-designed extensions to settlements in high-demand areas.

Please visit the exhibition stands
between sessions.

Thank you



Social Housing Grant Isn't Going to Be Enough: Innovative Finance Models

Cenydd Rowlands
Property director
Development Bank Wales

Gemma Clissett
Partnerships director - South Wales
Lovell

Jake Thompson
Property programme manager
Cardiff Capital Regen



Closing remarks

Gemma Clissett
Partnerships director - South Wales
Lovell

