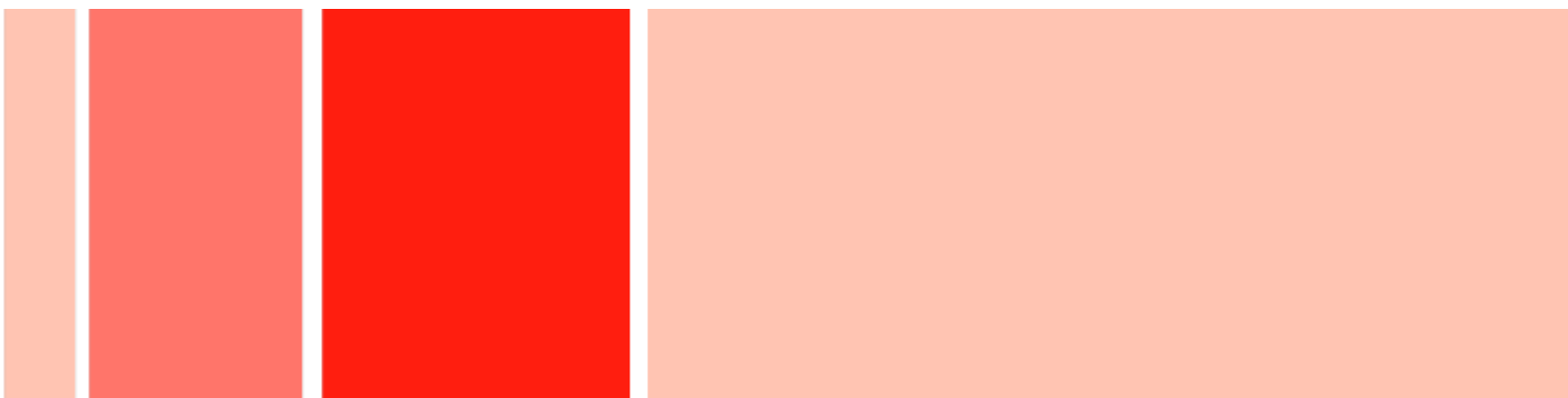


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Rent setting practices of social landlords in Wales



Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

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Rent setting practices of social landlords in Wales

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Views expressed in this report are those of the researcher and not necessarily those of the Welsh Government

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Glossary

Centre for Regional Economic and Social Research (CRESR)

Chartered Institute of Housing (CIH)

Community Housing Cymru (CHC)

Consumer Price Index (CPI)

Housing Association (HA)

Housing Revenue Account (HRA)

Local Authority Provider (LAP)

Local Authority Registered Provider (LARP)

Local Government Association (LGA)

Local Housing Allowance (LHA)

Ministry of Housing Communities and Local Government (MHCLG)

Monitoring Information (MI)

National Housing Federation (NHF)

Northern Ireland Housing Executive (NIHE)

Organisation for Economic Co-operation and Development (OECD)

Private Registered Provider (PRP)

Regulator of Social Housing (RSH)

Registered Social Landlord (RSL)

Right To Buy (RTB)

Scottish Housing Regulator (SHR)

1. Introduction and background

1.1. Context: rent setting in Welsh social housing

Rent setting in Wales is currently guided by the Welsh Government Rent and Service Charge Standard (Welsh Government, 2024a). This standard applies to all general needs and sheltered housing funded by Welsh Government programmes or through a landlord's own resources. It does not cover more specialised housing, such as supported accommodation. The Standard gives social landlords flexibility to determine how they set their rents in line with the Rent and Service Charge Standard. However, a set of jointly agreed initiatives are expected to be complied with as part of the Rent and Service Charge Standard (ibid).

The main rent-setting rules outlined under the Standard are:

- Consumer Price Index (CPI) +1 per cent is the maximum overall increase allowable in any one year but CPI+1 per cent must not be regarded as an automatic uplift to be applied by social landlords;
- individual tenants' rents can be reduced, frozen or rise by 'up to an additional £2' per week on the condition that the social landlord's overall increase in rental income is no greater than CPI+1 per cent;
- should CPI fall outside the range of 0 per cent to 3 per cent, the responsibility will rest with the Welsh Ministers to determine the appropriate uplift to be applied for that year;
- social landlords must advise the Welsh Government as soon as is reasonably practicable if there are concerns about the impact of the rent standard on their business plan, financial viability, or in their ability to meet their obligations to tenants and lenders (Welsh Government 2024a).

In addition to following specific rules, landlords are expected to support tenants facing financial difficulty, strengthen tenant involvement in rent-setting decisions, be transparent about how rent income is used, and work with tenants and the wider sector to ensure a consistent approach to affordability.¹

¹ The full range of expectations include: No evictions due to financial hardship during the settlement period, provided tenants engage with landlords; targeted support for tenants in financial difficulty to access help; prioritising the use of suitable social housing to move people out of poor-quality transitional accommodation into long-term homes; maintaining focused communications encouraging tenants to speak to landlords about financial issues and seek support; strengthening tenant involvement in rent-setting decisions, including transparency about how rent income is spent; Continued investment in existing homes to ensure they are safe, warm, and affordable; collaboration with tenants, Welsh Government, funders, and partners to create a consistent approach to assessing affordability in social housing; reducing evictions and avoiding evictions into homelessness by working with partners; conducting standardised tenant satisfaction surveys and publishing the data centrally (Welsh Government 2024a).

In recent years, high inflation has led Ministers to take a more active role in setting the maximum rent increases that landlords can apply (Welsh Government 2024b). Table 1.1 shows the rent cap and the CPI for each of the past six years.

Table 1.1: Social rent caps in Wales.

CPI measurement date	In-year CPI	Rent cap for following financial year
Sept 2019	1.7%	2.7%
Sept 2020	0.5%	1.5%
Sept 2021	3.1%	3.1%
Sept 2022	10.1%	6.5%
Sept 2023	6.7%	6.7%
Sept 2024	1.7%	2.7%

Source: Welsh Government.

On June 30th 2025, Welsh Government issued a consultation paper on a new rent and service charge standard for Wales seeking views (by August 12th) on proposals for changing the current arrangements from 2026 (Welsh Government 2025).

1.1.1. Wider regulatory framework in Wales

A Regulatory Framework applies to providers of social housing that are registered and regulated by the Welsh Ministers under Part 1 of the Housing Act 1996. The framework applies only to Welsh Registered Social Landlords (RSLs). It does not apply to stock holding local authority providers (LAPs). The current version of this Framework came into effect in 2022. It sets out a series of Standards that housing associations are expected to meet (Welsh Government, 2022).² In the context of this research, Standards 5 and 6 are particularly relevant. Standard 5 requires that rents and service charges remain affordable for tenants, while Standard 6 calls for a strategic approach to delivering value for money. To meet these Standards, housing associations in Wales are expected to work closely with tenants – engaging with them to ensure that rents are affordable and that housing services represent good value.

² The standards concern: effective strategic leadership and governance arrangements that enable a provider to achieve its purpose and objectives (RS1); robust risk management and assurance arrangements (RS2); ensuring the delivery of high-quality services to tenants (RS3); tenants are empowered and supported to influence the design and delivery of services (RS4); rents and service charges are affordable for current and future tenants (RS5); the organisation has a strategic approach to value for money which informs all its plans and activities (RS6); financial planning and management is robust and effective (RS7); assets and liabilities are well managed (RS8); the organisation provides high quality accommodation (RS9).

The Regulatory Framework was designed to align with, and avoid duplicating, Community Housing Cymru's (CHC) Code of Governance, which was published in 2021 (CHC 2021). Compliance with the Framework's Standards is mainly assessed through self-evaluation, with the Welsh Government also conducting Full Regulatory Assessment Reviews of RSLs.

1.1.2. Previous research on the topic

In 2019, the Welsh Government commissioned an independent study to review its social rent policy and assess its suitability. The report concluded that the policy largely achieved its goals of transparency, consistency, and fairness. However, the research also indicated that the policy would be less effective in a future scenario where inflation significantly outpaced earnings (Littlewood et al., 2019). This scenario has now materialised, with inflation outpacing increases in earnings across all parts of the UK, including Wales, between 2022 and 2024 (Francis-Devine 2025).

Recent challenges have brought into sharp focus the tension between maintaining affordable rents for tenants and ensuring the financial sustainability of social landlords. Landlords have faced multiple pressures, including the impact of the Covid-19 pandemic, the cost-of-living crisis, broader economic inflation, and the requirement to upgrade and modernise housing in line with the Welsh Housing Quality Standard (Welsh Government, 2023). In September 2024 TPAS Cymru published the results of its third annual Tenant Pulse survey on social rent setting. Although this achieved only 418 responses (significantly lower than the previous year) there was support from 39 per cent of respondents for the current rent settlement arrangements, but also arguments for adjustments based on affordability as well as inflation (TPAS Cymru, 2024).

Compliance with both the Rent and Service Charge Standard and the Regulatory Framework prevents landlords from simply passing on the rising costs they face to tenants. In light of recent developments, there is a renewed need to examine how landlords manage their costs while maintaining rent affordability for tenants.

The independent review of affordable housing, commissioned by the Welsh Government in 2019, recommended a five-year rent setting policy and emphasised the need for landlords to consider whether their housing and services represented value for money (Welsh Government, 2019). While Community Housing Cymru (CHC) and some of its members advocated for complete freedom in rent setting, the review panel warned that such an approach risked worsening affordability issues – particularly given that, in the 2018–2019 rent year, a majority of providers had increased rents to the maximum allowed under the then Rent Standard. Consequently, the review recommended that rent-setting policy in Wales should strike a balance between the interests of providers and the needs of tenants (ibid).

In undertaking this research, we were made aware that CHC had commissioned two pieces of independent research in 2024 examining the impacts of the current Welsh Government rent standard on housing associations and existing and future tenants. However, at the time of writing this report neither piece of work has been published.

1.1.3. Living Rents

A key aim of this research was to explore variations in rent-setting and how they are influenced by current inflationary pressures. The analysis aimed to determine whether a standard approach to assessing affordability could be developed, and whether such standardisation would be appropriate in the Welsh context. Assessing this required understanding how landlords currently approach rent-setting.

Within the strategic framework of the Rent and Service Charge Standard, social landlords have flexibility in determining whether rent changes are affordable for their tenants. Today, many social landlords in Wales have adopted a Living Rent approach. The original Living Rent approach had four key elements (Webb and Murphy 2022):

1. Using lower quartile regional earnings from the Annual Survey of Household Earnings (ASHE);
2. Adjusting rents according to property size, using the Organisation for Economic Co-operation and Development (OECD) or similar equivalence models;³
3. Ensuring rents do not exceed around 28 per cent of net earnings;
4. Applying rents within local authority boundaries.

Although many landlords continue to follow the principles of the Living Rent approach, their methods for setting rents differ. For example, Chapter 3 of this report shows that some social landlords use a higher net earnings threshold to account for service charges. This results in affordability benchmarks above 28 per cent, and often closer to 33 per cent. Chapter 3 also demonstrates how highlights differences in the data sources used to estimate household income. Some providers rely on the Annual Survey of Household Earnings, while others use National Living Wage figures. The analysis in Chapter 3 examines how these variations in methods and data sources contribute to differences in planned rent changes. Overall, Living Rents today represent a broad approach rather than a fixed methodology.

³ In the living rent methodology, equivalisation is used to adjust rents according to household earnings and composition. For example, a household with two adults is likely to have a higher income than a single-adult household. To account for this, the single-adult household might be given an equivalence value of 1, while the two-adult household is given a value of 1.5. This means the income of the two-adult household is assumed to be approximately 1.5 times the lower quartile earnings. As a result, once rents are adjusted in line with income, the living rent for the two-adult household would be higher than for the single-adult household. Equivalisation also takes into account the size of the property needed. Larger families typically require homes with more bedrooms, which tend to have higher rents. Most housing allocation policies aim to match households to appropriately sized properties, ensuring that rent levels reflect both income and housing need. For further details on the use of equivalisation in living rent methodologies see [Savills \(2015\) 'Living Rent Methodology'](#).

1.2. Report structure

Having taken stock of the context surrounding this research, the remainder of the report is set out as follows:

- Chapter 2 sets out the methodology used to address the research aims, including the analysis of monitoring information submitted by social landlords.
- Chapter 3 presents the core findings, highlighting a general trend towards rent maximisation, while also identifying variation in rent-setting approaches across landlord types and regions. It provides a breakdown of rent increases by provider, while also outlining how rent increases have been applied across the local authority areas that make up Wales.
- Chapter 4 reviews evidence of how social landlords set rents in other parts of the UK and selected OECD countries, identifying key differences and drawing lessons relevant to the Welsh context.
- Chapter 5 outlines policy recommendations for Welsh Government, based on the analysis presented throughout the report.

2. Methodology

2.1. Overview of methodology

In December 2024, Welsh Government commissioned the Centre for Regional, Economic and Social Research (CRESR) at Sheffield Hallam University to address the following research aims:

- to understand how social landlords in Wales are currently setting rents. This involved:
 - examining recent changes and identifying variations in rent-setting approaches between social landlords;
 - identifying key trends in rent-setting behaviour;
 - exploring the factors influencing rent-setting decisions;
 - assessing how social landlords engage with tenants;
 - and considering how practices in Wales compare with those elsewhere in the UK and beyond.
- to contribute to the Welsh Government's objective of developing a more consistent and transparent rent-setting framework – one that balances tenant affordability with the long-term financial sustainability of social landlords.

The study used two distinct methodologies to address these aims:

1. **Monitoring Information (MI) Data Analysis.** This involved analysing MI forms submitted annually by social landlords in Wales to the Welsh Government. These self-certified returns align with financial years and cover the period from 2020 to 2024. While most data were available, some forms were missing in certain years. These gaps are highlighted in Section 2.2.
2. **Narrative Evidence Review.** A targeted review of existing evidence was conducted to compare rent-setting policies and approaches in Wales with those used in other UK nations and selected OECD countries.

These research activities took place between December 2024 and April 2025.

2.2. Data analysis

The Welsh Government requires social landlords in Wales to complete and submit monitoring returns each February as part of the Rent Standard. In recent years, these returns have informed decisions about rent-setting limits. The monitoring forms, which follow the template provided in Annex A, were shared with the research team and formed the basis of the monitoring information (MI) data used in this report's analysis. These forms contain details on how social landlords have set their rents, and how they have engaged tenants in their decision-making.

The first step of the research involved collecting and processing the monitoring forms. Once any personal data was removed, these were uploaded by the Welsh Government to a

secure external file-sharing platform, from which the research team downloaded them to a secure network drive.

Once transferred, the forms were reviewed and compiled into a single database. The data was sorted by year and the key quantitative and qualitative information extracted from the forms. This consolidated dataset formed the basis for the analysis presented in Chapter 3.

The comprehensiveness of the submitted responses varied between social landlords. Some provided detailed and substantive information each year, while others submitted more concise responses or repeated answers from previous years. The final analysis presented in Chapter 3 assumed that these forms were completed accurately. Any inconsistencies between actual rent increases and those reported in Chapter 3 will arise from self-reporting errors. These potential inconsistencies – common in self-reported data – were raised with the Welsh Government. Overall, the MI data was assessed as sufficiently robust and credible for analysis.

In addition to variations in data quality, some monitoring forms were missing each year. The total number of forms submitted annually is shown in Table 2.1:

Table 2.1: Total number of monitoring return forms provided for each financial year.

Financial year	Number of returned forms
2020-2021	43
2021-2022	37
2022-2023	39
2023-2024	44

Source: Welsh Government provided monitoring return form from Welsh social housing providers

The MI data was analysed by comparing rent changes across social landlords. Key findings were summarised and presented in Chapter 3.

In addition to the MI data, supplementary data from StatsWales was used to validate and contextualise the findings – particularly in understanding how average rents have changed across different housing types (e.g. one-bedroom homes) in the social rented sector. This publicly available dataset was accessed through the StatsWales online portal.

To illustrate geographical variation in rent levels, both the MI data and supplementary data from StatsWales were mapped using Geographic Information Systems (GIS). Choropleth maps were created to show variations in rents and affordability at the local authority level.

A key limitation of this analysis was the lack of more detailed geographic data. Some social landlords operate across multiple local authority areas, and the absence of more granular data meant it was not possible to map rents at the provider or neighbourhood level. As a result, the analysis is limited to average rent levels by local authority area.

2.3. Narrative evidence review

A narrative evidence review was conducted to understand how social rent setting in Wales compares to other parts of the UK. This involved selecting a range of recent publications –

including academic literature, policy reports, and grey literature⁴ – that explored current approaches to social rent setting in Wales. Following this initial review, a Google Scholar search was conducted using the term ‘social rent setting’ with qualifiers such as ‘England,’ ‘Scotland,’ ‘Wales,’ and ‘Northern Ireland.’ The review primarily focused on literature published from 2015 onwards.

In addition to UK-focused literature, a more selective review was carried out to explore rent-setting approaches to public sector housing in Organisation for Economic Co-operation and Development (OECD) countries. This illustrated a broader international perspective. While social housing across the UK is typically subsidised through a combination of collected rents and direct government funding, this review considered alternative models used internationally and assessed the extent to which lessons from selected OECD countries could be applied in the Welsh context. The findings from this review are presented in Chapter 4.

⁴ Grey literature is information produced at all levels of government, academia, business and industry in electronic and print formats not controlled by commercial publishing. For more information see the University of Exeter’s [guide](#).

3. Findings: Rent setting practices of social landlords in Wales

3.1. Introduction to the analysis

This chapter presents the data analysis of the MI forms and supplementary data results. It is divided into three parts:

1. MI data analysis: Section 3.2 provides an overview of rent variations across different local authority areas in Wales based on MI data.
2. Qualitative analysis: Section 3.3 reviews the qualitative data from the MI form to assess the factors that drive rent-setting behaviour amongst social landlords.
3. Supplementary data analysis: Section 3.4 offers additional insights into rent setting trends across various locations and property types using data from StatsWales.

3.2. Monitoring Information data analysis: social rent setting trends in Wales

The MI data analysis examined the planned rent increases of social housing providers in Wales from 2020 to 2024. From these individual increases, an average increase was calculated for each financial year. This average is detailed in Table 3.1 and is shown alongside the rent cap for that year:

Table 3.1: Average social rent increases by financial year.

Financial Year	Average rent change	Rent Standard cap
2020-2021	+2.4%	+2.7%
2021-2022	+1.3%	+1.5%
2022-2023	+2.9%	+3.1%
2023-2024	+6.2%	+6.5%

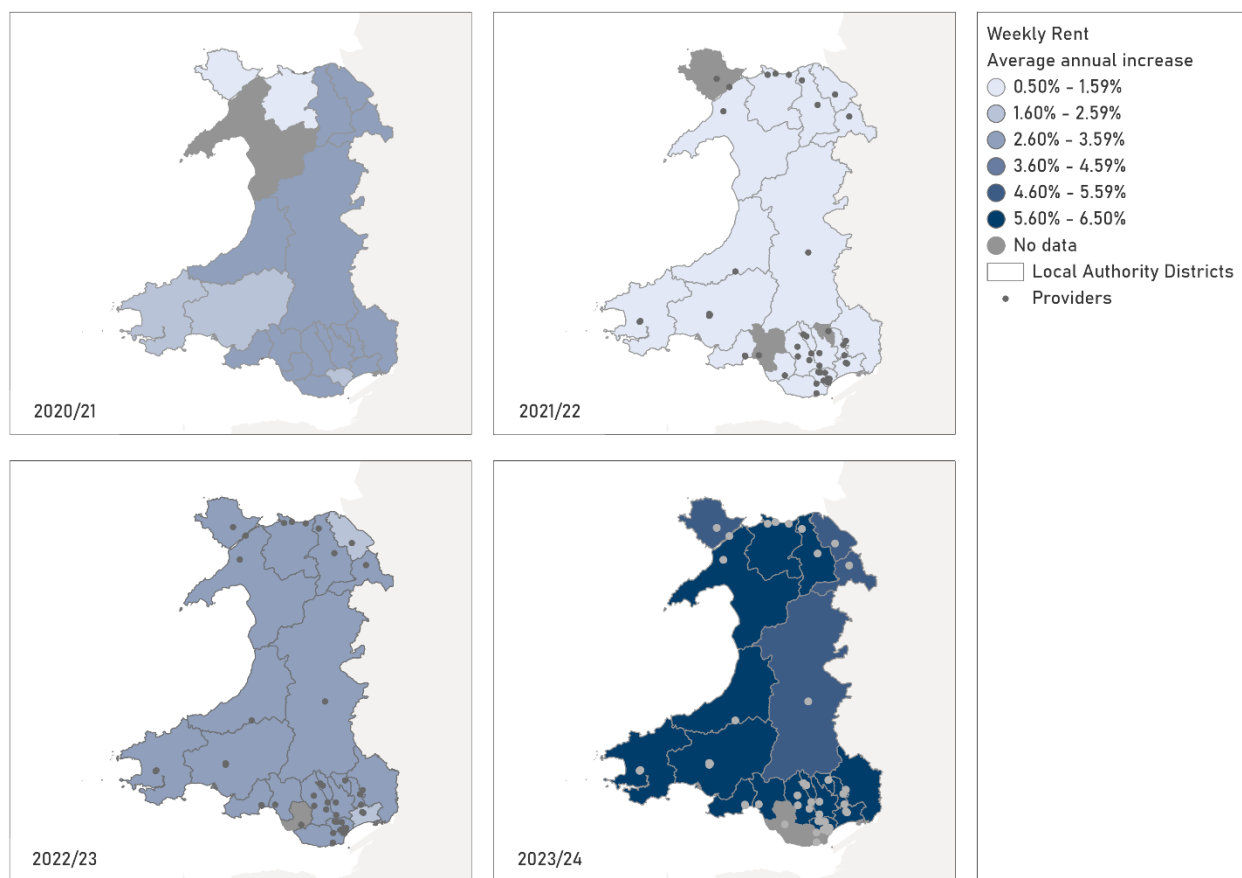
Source: Monitoring return forms, authors' analysis.

The data confirms that average rent increases for each financial year were close to the maximum rent increase allowed under the Rent Standard.

3.2.1. Examining rent changes

The impact of rent changes varied across different local authority areas in Wales, as shown in Figure 3.1:

Figure 3.1: Year-on-year rent increases across local authority areas.



Source: Welsh social landlords annual self-certification monitoring forms.

Although rent changes varied across local authority areas and between financial years, most social landlords raised rents to the maximum allowed under the Rent Standard cap. To understand this variation further, we examined rent changes across the different regions of Wales.

In South East Wales, including the Valleys, Cardiff and its surrounding areas, providers generally applied the maximum permitted rent increases. The main exception was in the 2020-21 financial year where self-reported rent increases in Cardiff were 0.3 per cent below the cap and the 2022-23 financial year, where reported rent increases in Newport were 0.9 per cent below the cap.

In South West Wales, rent increases varied across financial years. In 2020-21, the average rent in Carmarthenshire was 0.9 per cent below the rent cap, while in Pembrokeshire it was 0.5 per cent below. In subsequent years, however, rent increases in both areas were generally much closer to, or in line with, the cap.

Most providers with housing stock in Mid Wales increased their rents in line with the cap. However, a major provider in Powys set rents 1.1 per cent below the cap in the 2023-24 financial year. As a result, Powys was one of the few local authority areas where average

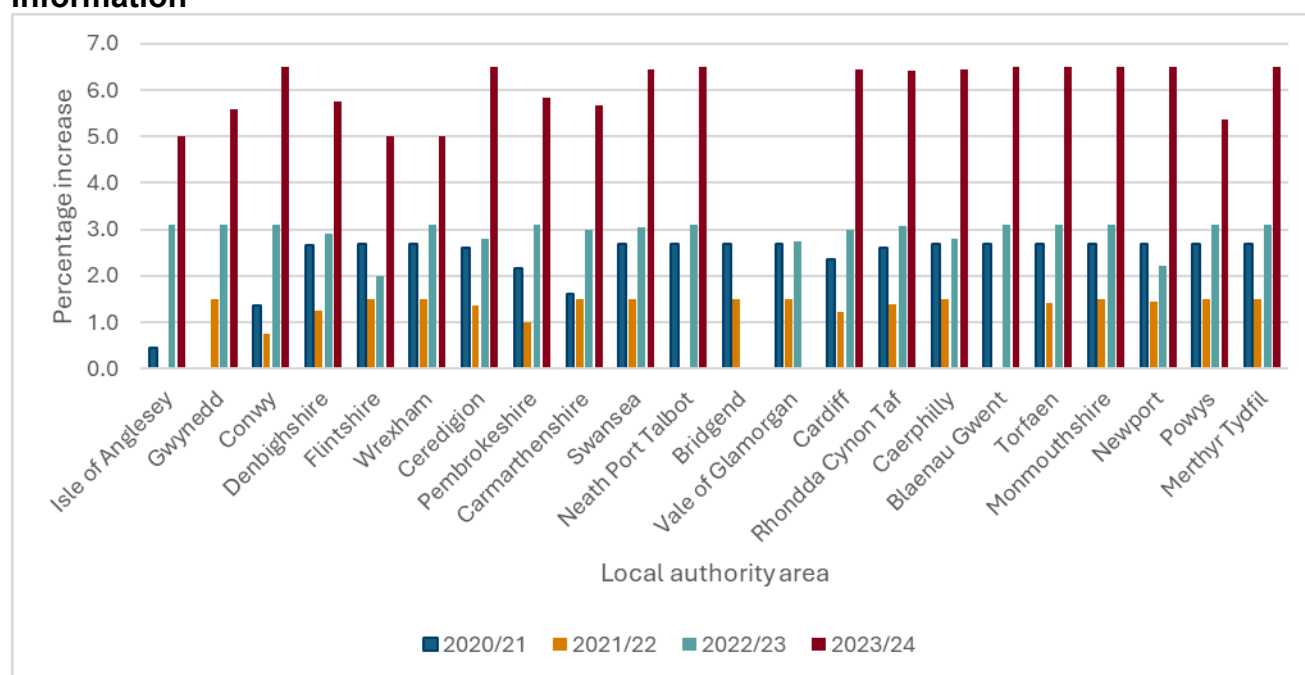
rent increases were below the cap during that period. The factors that led some providers to raise rents below the cap are explored in Section 3.3.

In North East Wales, average rent increases were among the lowest across all regions, particularly during the 2022-23 and 2023-24 financial years. Despite this, many providers applied the maximum allowable increases, especially in some of the earlier years. Overall, the region showed the greatest variation, with some social landlords setting rents at the cap and others keeping rents below it. This variation is reflected in the lower average rent increases observed in the final two financial years.

In North West Wales, data was missing from providers with stock on the Isle of Anglesey for the 2021-22 financial year. During the 2020-21 and 2023-24 financial years, the Isle of Anglesey recorded some of the lowest average rent increases, which were 2.2 per cent and 1.5 per cent below the cap for those respective years. The available data suggests that rents were maximised across all four financial years in the other local authority areas of North West Wales.

Overall, the MI data showed that while social landlords generally maximised their rents, there were notable exceptions each financial year. Often, when rents were set below the cap for a given year, this was offset by increases in line with the rent cap in subsequent years. Only one provider indicated in their monitoring returns that they consistently set rents below the cap for consecutive years. A detailed breakdown of average rent increases by local authority area is provided in Figure 3.2:

Figure 3.2 Average rent increases by local authority area based on Monitoring Information



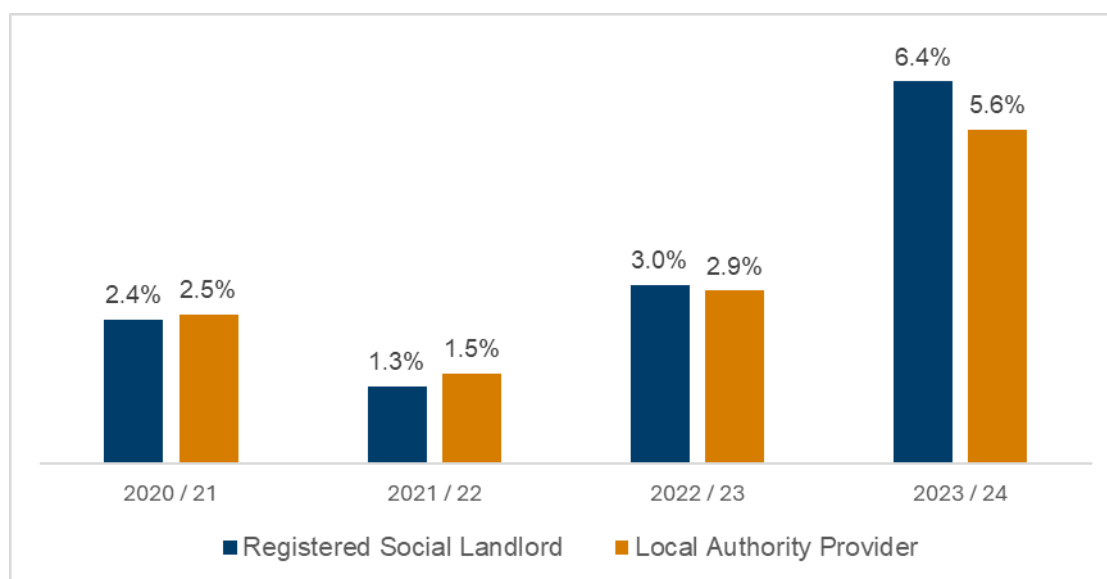
Source: Authors' analysis of MI data.

Variations between providers

The analysis highlighted small differences between how Registered Social Landlords (RSLs) and local authority providers⁵ (LAPs) implemented rent changes. While HA and LARP rent increases were broadly in line for the first three financial years, the gap was much more significant at 0.8 per cent for the 2023-24 financial year. Figure 3.3 illustrates the average RSL and LAP rent changes in Wales across the four-year period:

⁵ This refers to the 11 stock holding local authorities in Wales providing homes for social rent that are not regulated under Part 1 of the Housing Act (1996).

Figure 3.3: Average rent increase by provider type (RSL or LAP).



Source: Authors' analysis of MI data.

There was no clear link between the size of a housing provider and the rent levels it set. For instance, in 2023-24, one of the largest providers by stock, set its rents 1 per cent below the rent cap. Meanwhile, a smaller provider increased rents by the maximum allowed. The analysis of the monitoring returns indicated that rent-setting decisions were much more strongly influenced by tenant affordability and financial sustainability than by the size of a provider. This is further detailed in Section 3.3.

The monitoring returns were analysed to identify factors that might explain the differences in rent-setting approaches between RSLs and LAPs. While there were some unique aspects to how LAPs set rents, there were also many similarities with the approach taken by RSLs. Both LAPs and RSLs considered factors that helped them determine local housing costs such as Local Housing Allowance (LHA)⁶ rates, local earnings data, and direct feedback from tenants gathered through surveys and consultations. Several LAPs and RSLs based their rent-setting decisions on the Welsh Government's target rent bands.⁷ Many aimed to align their estimated living rents with the rent cap to achieve convergence. This approach and the factors informing rent-setting decisions are further explored further in section 3.3.

⁶ Local Housing Allowance (LHA) is used to set how much housing benefit private renters can claim towards their housing costs. It is determined by the UK Government based on rent data from the Valuation Office Agency. The rates are ultimately decided by the Department for Work and pensions. LHA is not a devolved issue in Wales.

⁷ Target Rent Bands were introduced in Wales to promote greater consistency in social housing rents within local areas by encouraging landlords to set rents within specified ranges. These bands successfully supported rent convergence. However, they were suspended in 2020-21. Since then, the main framework for managing rent affordability and fairness has been the CPI + per cent rent envelope. For more details and to review proposed changes, see the open consultation on [a new rent and service charge standard for Wales](#).

3.3. Factors that determined rent setting amongst social landlords

Qualitative analysis of the text-based responses contained in the monitoring returns was undertaken to identify the main factors driving rent-setting behaviour. These factors are explored in this section and include the use of housing market data, considerations stemming from the wider financial environment and feedback from tenant engagement.

3.3.1. The use of housing market data

Social landlords commonly referred to housing market data when assessing the affordability of rent increases for tenants. Our research found that, over the past six years, most social landlords in Wales have adopted the 'Living Rent' model to guide their approach to affordability and rent setting. This approach was used alongside several other data sources to formulate rents. These factors are discussed below.

1. **Living Rent approach.** When setting rents using a living rent approach, social landlords considered how much properties of a particular size could be rented for in a specific area, taking into account their 'value' within the local housing market. As noted in section 1.1.3, the precise way in which providers calculate their Living Rents can vary. As such, there is no fixed Living Rent methodology but rather, the use of Living Rent represents a general approach. For example, one provider noted that they made sure their combined rent and service charges were affordable for someone earning the National Living Wage. In contrast, another provider stuck very closely to the original Living Rent methodology originally devised by Joseph Rowntree Foundation and used data from the Annual Survey of Household Earnings (Savills, 2015).

Some providers not only considered various data sources – such as Housemark data and StatsWales rental data – to estimate tenant income but also combined rents and service charges when calculating affordability. As a result, they set higher affordability thresholds (closer to 33 per cent of household income) than providers who based their calculations on rent affordability alone (closer to 28 per cent of household income).

Social landlords also highlighted the importance of rent convergence to ensure that similarly sized properties in the same area were priced fairly. As a result, landlords indicated that adjustments were made to ensure that Living Rents aligned with target rents where necessary.

2. **Comparative datasets.** When setting rent some providers also reported using tools such as Housemark, Community Housing Cymru's (CHC) Affordability Tool (via Housemark), Hometrack, and StatsWales rental data to compare rents against both the sector average and the broader local housing market.

The use of these datasets demonstrate that social landlords use a wide range of data sets to supplement and 'sense check' their formulated rents in relation to local housing markets.

3. **LHA benchmarking.** Social landlords compared their social rents to Local Housing Allowance (LHA) rates to assess affordability in relation to Housing Benefit and the private rented sector. For instance, one mid-Wales LAP aimed to offer good value by aligning their rents with local private rent levels. Others compared current rent levels with market-rents and LHA to determine the extent to which their rents were affordable in relation to the wider market.

3.3.2. Financial environment

Since the end of 2021, the United Kingdom has faced a prolonged cost-of-living crisis, characterised by high inflation and stagnating household incomes (Francis-Devine, 2025). The importance of responding and adapting to this changing financial context was highlighted in the MI responses by social landlords.

The financial environment and operating costs were key considerations for both LAPs and RSLs. For example, LAPs noted in their monitoring returns that staff salaries are set through pay agreements covering the entire local authority. As a result, nationally or locally agreed pay awards led to increased costs in their Housing Revenue Accounts (HRAs). In addition, HRAs must be regularly reviewed and approved by the council's Cabinet. During this approval process, elected councillors may support, or challenge proposed rent increases. In such cases, the weight given to financial considerations can vary depending on how they balance against concerns about tenant affordability.

While RSLs faced similar pressures, the MI forms indicated that the process of setting rents was generally more streamlined. Rent levels were typically approved by their executive boards. Although tenant or democratic bodies within RSLs may be consulted, they do not have the power to block rent increases, unlike council Cabinets.

The MI forms indicated a number of shared considerations held by LAPs and RSLs when it came to balancing rents against efficiencies and operating costs. This included:

- the impact of staff salaries and cost of living awards during the examined period;
- the need to balance rent increases and affordability in light of plans to build new homes and improve the quality of existing housing stock;
- a desire to ensure that tenants were satisfied with the housing offered and that it offered tenants value for money;
- consultation with tenants through surveys or tenant reference groups to gain feedback on services and identify where both improvements and cost efficiencies could be made;
- identifying where possible cost reduction measures and savings within existing operations;
- ensuring that any in-year rent increases supported long-term business plans for growth and delivery.

3.3.3 Landlord engagement with tenants

A key requirement of both the Regulatory Standards and Rent Standard is for social landlords to demonstrate that they have effectively consulted and engaged with their tenants when developing their rent policy. While the precise approach to engagement varied between social landlords, a number of common methods and engagement tools were used. This included:

- the use of surveys to understand tenant perceptions and their satisfaction with their housing, including if it offered value for money;
- consultation with tenant reference groups and other tenant involvement programmes to inform rent setting decisions;
- writing to tenants to communicate planned increases and provide an opportunity for feedback on planned changes.

Social housing providers who used a Living Rent approach also consulted with tenants to explain how such an approach might work and what it could mean for them. For example, one HA held a consultation with its tenants before introducing the approach and found tenants were supportive of the change. Another landlord set up a tenant scrutiny body to assess and challenge whether proposed rent increases were genuinely affordable.

Tenant engagement in relation to rent setting was generally consistent across providers in terms of approaches and methods, with annual surveys commonly used to gather tenant views. These surveys included annual surveys and the standardised tenant satisfaction surveys⁸ that the Welsh Government requires social landlords to complete every two years. Other forms of engagement included tenant consultations and engagement with tenant groups. The Covid-19 pandemic disrupted tenant engagement activities, and many social landlords adapted their engagement plans. For example, several landlords moved to digital surveys and online methods when face-to-face engagement was no longer possible. Others scaled back or shortened their engagement activities during the periods most affected by the pandemic. Overall, MI data suggests that tenant engagement returned to pre-pandemic levels after 2022, with the most significant disruptions occurring in the early stages of the pandemic.

While approaches to tenant engagement were broadly consistent, providers put different amounts of emphasis on tenant engagement. For example, a couple of providers engaged in extensive tenant consultation through workshops and tenant scrutiny panels to test their rent setting approach and make changes based on tenant feedback. In contrast, other providers reported that they did not consult tenants specifically on annual rent increases, instead relying on feedback from regular tenant surveys or used their annual trust and satisfaction survey to gather tenant views and inform rent-setting decisions. Overall, there were no major differences in how LAPs and RSLs engaged with their tenants. Both types of landlord would use a mix of survey, consultations and other tenant engagement exercises.

⁸ This standardised survey was also impacted by the Covid-19 pandemic and published a more limited set of data in 2021. More information on the standardised tenant satisfaction surveys is available here: [Social landlords: tenant satisfaction survey 2024](#).

The extent to which these different tools were used varied between providers, irrespective of whether they were an LAP or RSL.

The extent to which social landlords involved tenants in the rent-setting process varied. Some social landlords regularly engaged with tenant groups and used their input to inform annual rent increases. Others carried out annual consultations with tenants, which included consultation on rent proposals. In contrast, some social landlords consulted tenants on rent increases only occasionally or on an ad-hoc basis.

Social landlords viewed tenant engagement as an important part of their rent-setting approach. Engaging with tenants is a requirement of the Rent and Service Charge Standard, yet social landlords indicated they saw additional value in engaging with tenants, particularly in terms of sense checking planned rent increases. However, it is clear from the breadth of tenant engagement activity that social landlords in Wales have a broad approach to tenant engagement and that there is significant variation in the extent to which tenant engagement is embedded in rent-setting approaches.

3.3.4. Future considerations raised by providers

The monitoring returns gave providers the opportunity to add comments or highlight any issues they believed could affect future rent increases. However, most providers either left these sections blank or did not raise any significant concerns. Where additional comments were provided, they primarily focused on the following themes:

- the need for Welsh Government to announce rent policy decisions earlier, allowing more time for providers to prepare and respond;
- the forthcoming plans from providers to review service charge levels and the methods used to set them;
- the impact of ongoing economic volatility and its implications for rent-setting plans and overall financial viability;
- the link between achieving the Welsh Housing Quality Standard (WHQS) and the outcomes of future rent-setting decisions, including concerns about the ability to set rents at a level that supports compliance.

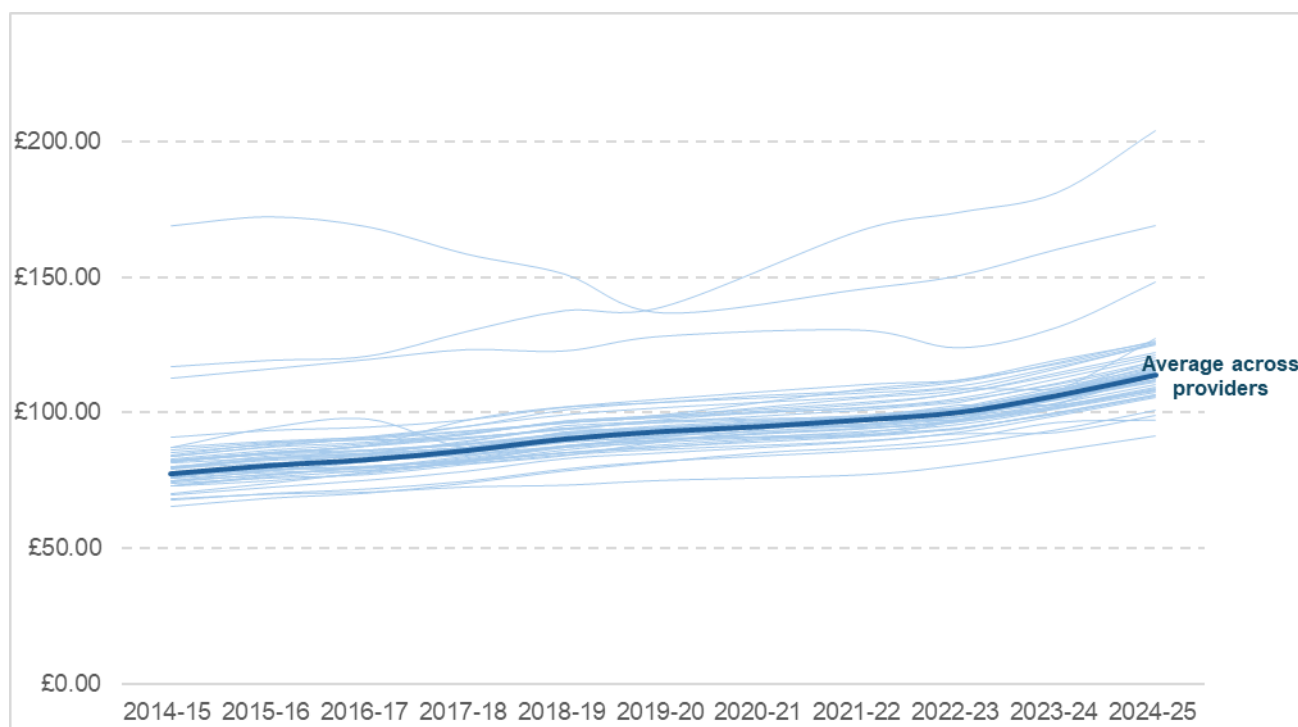
To further explore rent changes and address gaps in the MI data, specifically the absence of rent changes across property type, a supplementary data analysis was conducted. This focussed on how rents have changed in recent years. The findings from this analysis are discussed in the next section.

3.4. Supplementary data analysis

StatsWales data was used to contextualise and validate key findings from the MI analysis. To understand how recent rent-setting trends compare with historical patterns, average rents across all providers and property types were examined. The analysis showed that social rents have risen steadily over the past decade on a relatively consistent trajectory. Average weekly rents increased from £78 in 2014 to £95 in 2020, and then to £114 by 2024.

This suggests that rent increases have remained relatively controlled during recent years. Figure 3.4 illustrates the overall rent trend.

Figure 3.4: Average weekly rents for all providers, 2014-2025.



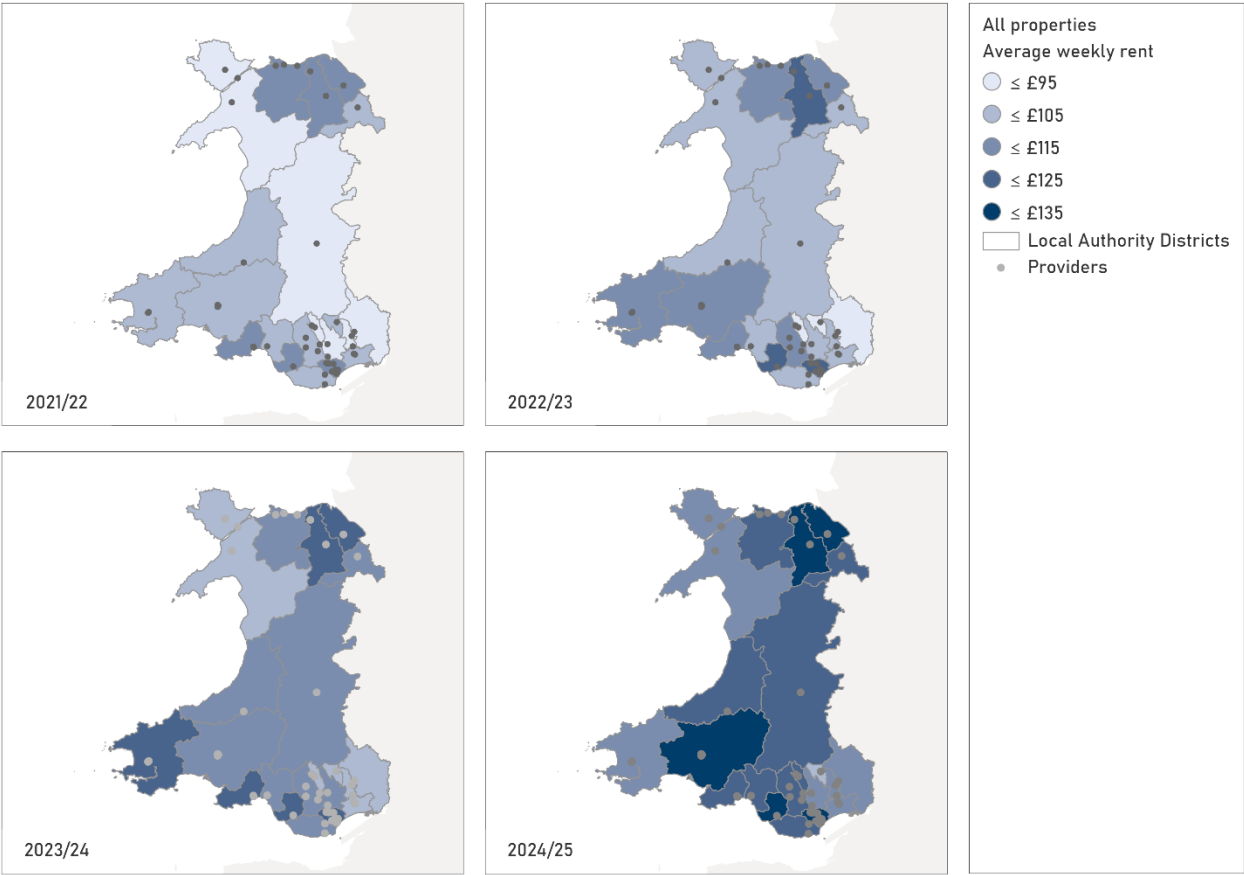
Source: Authors' analysis of StatsWales housing data. Average across all sizes of property.

3.4.1. Rent changes across different size properties

The MI data analysis did not offer robust insight into whether individual providers varied rent increases according to property size. To address this gap, supplementary data was analysed. This additional analysis found no significant relationship between property size and the rate of rent increases. Rent increases were broadly consistent across both one-bedroom properties and those with two or more bedrooms. This consistency may reflect the use of equivalisation⁹ by social landlords to calculate their Living Rents. It may also point to the impact of the Rent Standard cap in setting consistent rent limits. This trend is illustrated in Figures 3.5, 3.6, and 3.7, which show how rents have increased at the local authority level.

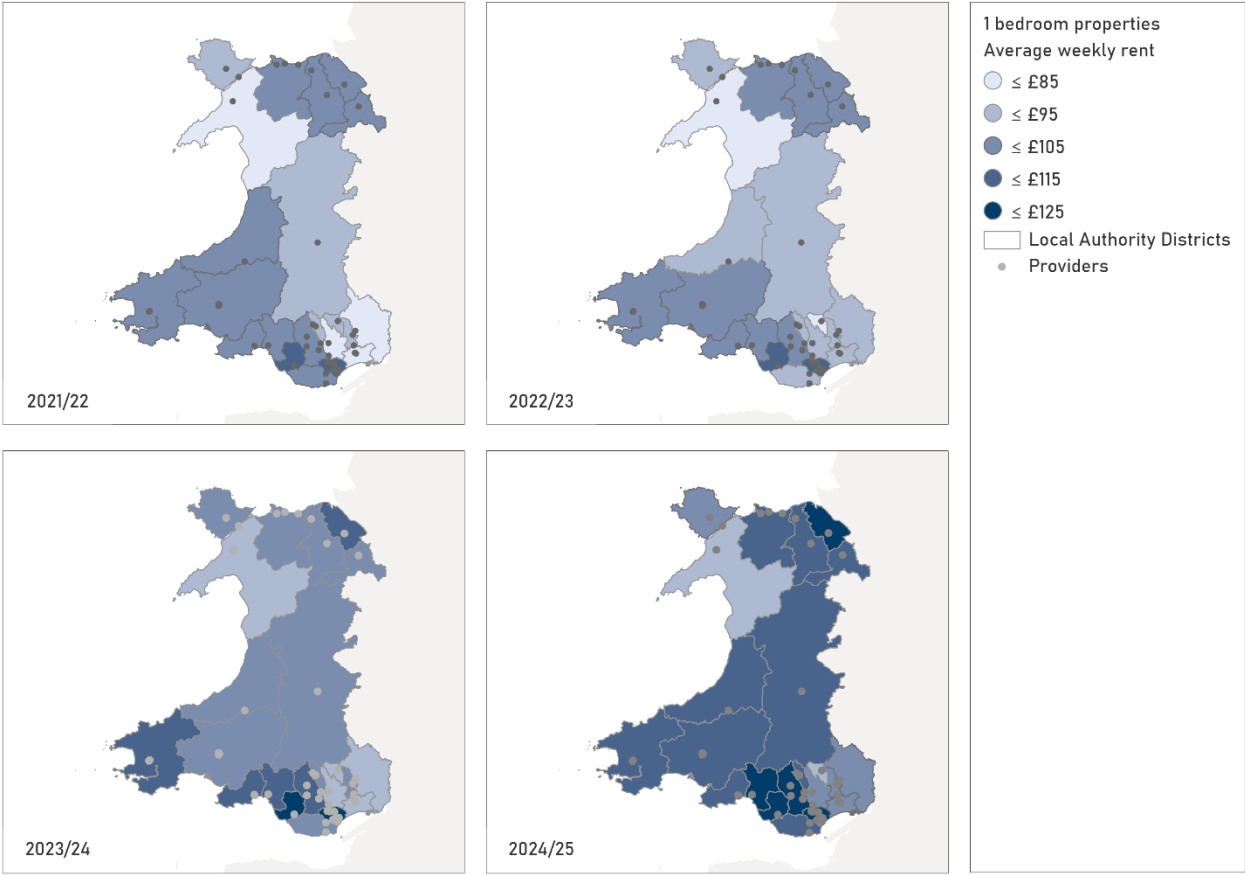
⁹ See footnote 3 for a description of equivalisation and its use in setting Living Rents.

Figure 3.5: Average weekly rents across all properties by local authority area.



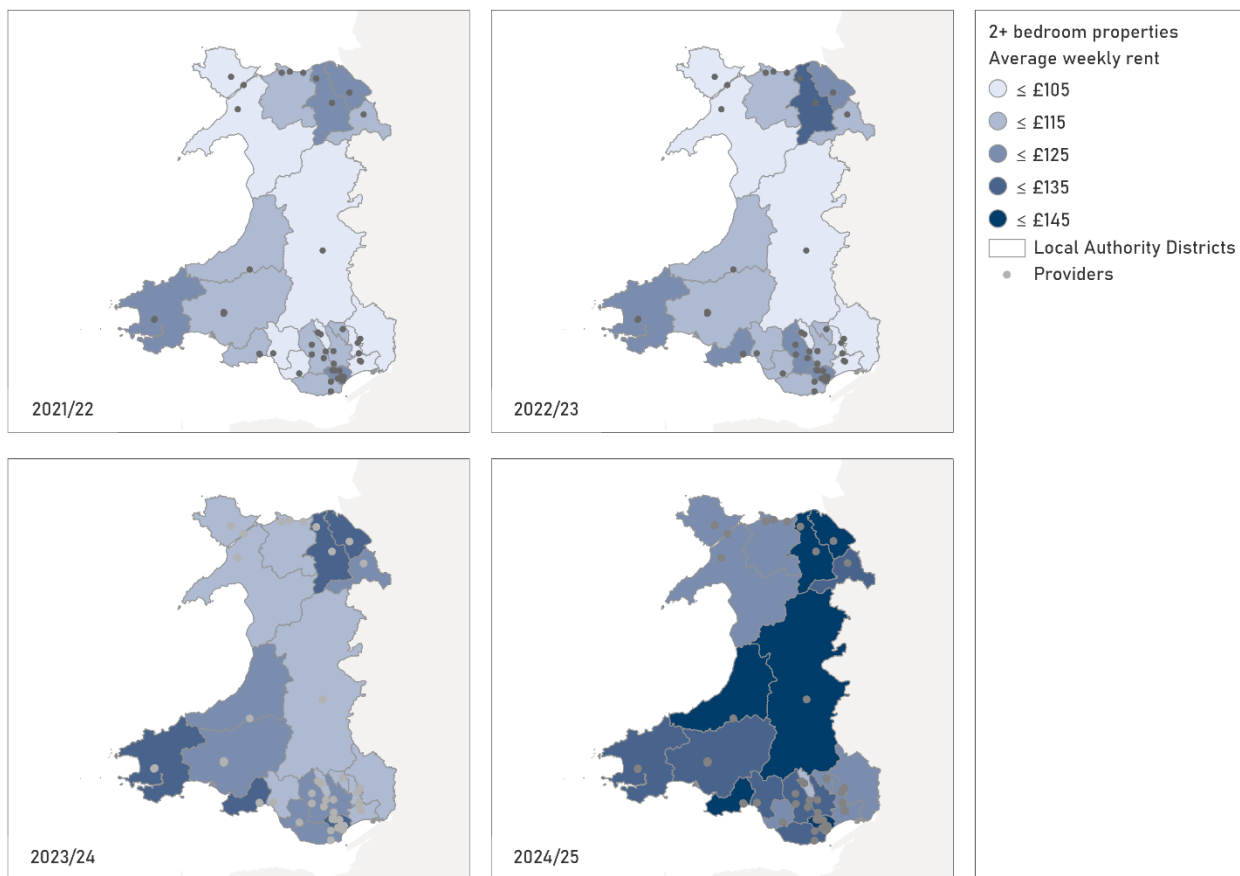
Source: [StatsWales](#)

Figure 3.6: Average weekly rents across 1-bedroom properties by local authority area.



Source: [StatsWales](#)

Figure 3.7: Average weekly rents across 2+ bedroom properties by local authority area.



Source: [StatsWales](https://stats.wales.gov.uk/)

3.5. Summary of analysis

The data analysis provided insight into social rent setting in Wales. The analysis found significant variation in how social landlords in Wales set rents. Several factors appeared to influence rent-setting decisions, including:

- operational considerations such as the cost of maintaining and improving homes;
- geographical location and the affordability of social housing in relation to the local housing market;
- the financial sustainability of social landlords and their business models;
- the specific application of rent-setting models and how social landlords applied a living rent approach;
- whether the provider was a registered social landlord or local authority provider, with each type having different processes for approving rent increases;

- tenant engagement practices and the collection of tenant feedback to inform rent-setting decisions.

Although the analysis did not assess the relative impact of each factor, monitoring returns highlighted that the wider financial environment, including the cost pressures that social landlords faced, was a significant factor that informed the rent-setting decisions of social landlords. The affordability of housing in relation to local housing markets was also influential in informing rent-setting approaches. Future research could explore the relative importance of these factors in more detail.

Rent increases across Wales generally increased in line with the Rent Standard cap and did not vary substantially between different areas. No region experienced a notable rise in social rents, whether measured by percentage or the actual rent charged for different property types (such as one-bedroom or two-bedroom homes).

There was a slight difference in rent-setting approaches between RSLs and LAPs. On average, LAPs implemented smaller rent increases than RSLs during the 2023-24 financial year for example. This may be due to the additional requirements that LAPs need to consider. For example, the requirement for council Cabinets to approve budgets and to consider how rent changes affect Housing Revenue Accounts (HRAs).

Social landlords described several ways they take tenant affordability into account when setting rents. Most social landlords in Wales now use a Living Rent approach, which involves actively considering tenant incomes as part of the rent-setting process. Other factors informing affordability assessments included assessing how social rents compare to the wider housing market, whether rents align with Local Housing Allowance (LHA) rates in the private rented sector, and feedback gathered through tenant consultations such as surveys.

Tenant engagement practices varied between social landlords. Generally, surveys and tenant engagement groups were used to inform rent-setting decisions, though the frequency and format differed. Some social landlords carried out these activities annually, while others used them on a more ad-hoc basis. Annual surveys were commonly used to gather feedback on affordability. While tenant engagement was relatively consistent overall, some disruption occurred during the Covid-19 pandemic, prompting a shift toward more digital methods of engagement.

The next chapter provides insight into how rent-setting approaches in Wales compare with those found elsewhere in the UK and the OECD. It also identifies lessons that could be learned from other regions to help inform future rent-setting policy in Wales.

4. Findings: Welsh rent setting in the context of the UK and OECD

This chapter considers the how other parts of the UK beyond Wales and other countries in the OECD approach social rent setting. However, it's important to begin by highlighting the differences in the scale of social renting across the four UK nations.

4.1. The social rented sector in the UK

Historically, the UK developed its own model of social housing, in many ways distinct from other European countries (Scanlon et.al, 2014). This began in the nineteenth century with the emergence of philanthropic housing organisations, which were the forerunners of today's housing associations. Local authorities (councils) then took on a dominant role in developing, owning, and managing council housing. Over the past 50 years or so, the sector has continued to evolve.

In recent decades, the social housing sector has shifted from being dominated by local councils to becoming more diverse, with housing associations now being the main providers and developers of additional social housing (Pawson and Mullins, 2010). Although the sector has experienced a long-term decline in scale over the past fifty years, there have been modest increases in recent years (Stephens et al. 2025, Table 17a). The demographic profile of those living in social housing has also changed, with a higher proportion of younger and older households, lone parents, and individuals who are economically inactive or dependent on benefits, although this process of residualisation may have come to an end (see, for example, Tunstall, 2021). This change partly reflects policies such as the Right-to-Buy (RTB), which allowed many economically active individuals to purchase their own homes, as well as allocation policies that prioritise housing for those in greatest need, including homeless and vulnerable households (Murie, 2016).

Table 4.1 highlights the varying patterns of social housing across the different nations and regions of the UK. Despite recent changes and differing histories, social housing continues to focus on providing relatively affordable housing for households that cannot afford to buy or rent at market rates. It prioritises access for those living in insecure, poor-quality, or overcrowded housing, as well as those facing homelessness.

Table 4.1: Social Sector Dwellings in the UK, 2022

Country	Housing association	Local authority/NIHE	All Dwellings
England	2,542,000 (10.1%)	1,610,000 (6.4%)	25,160,000 (100%)
Northern Ireland	49,000 (6.0%)	83,000 (10.1%)	822,000 (100%)
Scotland	297,000 (11.1%)	321,000 (11.9%)	2,687,000 (100%)
Wales	147,000 (10.0%)	88,000 (6.0%)	1,472,000 (100%)
UK	3,035,000 (10.1%)	2,102,000 (7.0%)	30,141,000 (100%)

Source: Chartered Institute of Housing, 2025 UK Housing Review, Coventry, CIH.

Another significant change in social housing in the UK over recent decades has been the shift in governance brought about by political devolution. This has led to variations in housing policy and practice across the different territories of the UK, with distinct

arrangements for regulating social housing and, in some cases, different policies towards the sector. The financial frameworks for social housing have also evolved differently, including the restructuring and control of social rents. In the next sub-sections, we examine the current arrangements in England, Scotland, and Northern Ireland.

4.2. Social housing in England

Social rented housing in England is provided by two main types of organisations: local authorities (councils) and housing associations (Registered Social Landlords), all of which are registered with the Regulator of Social Housing (RSH). These organisations are categorised by the Regulator as either:

- Local Authority Registered Providers (LARPs) – local councils that own and manage their own housing stock.
- Private Registered Providers (PRPs) – not-for-profit housing associations. Additionally, there are a small number of for-profit associations registered with the English regulator.

At the end of March 2024, LARPs reported owning 1,574,288 social homes in England, which include both low-cost home ownership units and low-cost rental units. Most of the housing owned by LARPs is general needs low-cost rental stock (93 per cent), with almost all of this being general needs social rented housing (98 per cent), and the remaining 2 per cent being affordable rented homes (RSH, 2024).

At that time, there were 226 LARPs in England. The two largest, Birmingham (with 58,813 homes) and Leeds (with 52,932 homes), accounted for 7 per cent of all LARP stock in England. However, 53 English local authorities had fewer than 1,000 social homes each, and 83 no longer owned any social housing stock. Further information on the profile of LARP housing stock is available from the RSH¹⁰.

PRPs in England reported owning 3,234,235 homes, including both social and non-social housing. Of these, 231 large PRPs, each owning 1,000 social homes or more, accounted for 96 per cent of the housing stock, despite making up only 17 per cent of all PRPs. The 81 largest PRPs, each with over 100,000 units, represent 74 per cent of this sector (RSH, 2024).

4.2.1. Rent setting mechanisms in England

Local councils (LARPs in England) are obliged to balance their Housing Revenue Accounts (HRAs) whilst PRPs must cover their debt repayments, as well as the costs of management and maintenance, from their rental income. Across the social housing sector 'rent pooling' has been a feature of social housing for almost a century, allowing social landlords to consider debt, costs and rents across their stock, rather than in terms of individual developments. This has meant that rents on newly provided homes (with typically higher levels of debt) can be reduced by cross-subsidising from rents received on older

¹⁰ The RSH collects and publishes a range of data from individual registered providers in England. These are available at: [Reports and statistics - GOV.UK](https://www.rsh.gov.uk/reports-and-statistics).

developments with lower levels of outstanding debt (Wilson, 2022). However, the different rent policies adopted by different social landlords over the decades have resulted in anomalies and inconsistencies in terms of the rents charged for individual tenancies.

In the early 2000s, the Labour Government introduced a policy of rent convergence in the social housing sector, aiming to align rents over a 10-year period. For properties let at 'social rent' (which make up the majority of rented social housing), the actual rent would be based on a government-set formula. This 'formula rent' for each property would be calculated according to the property's relative value, local income levels, and size. The goal of this formula-based approach was to ensure that similar rents were charged for similar social rent properties. Government guidance suggested that:

- 30 per cent of the rent should be based on the relative property value;
- 70 per cent of the rent should be based on relative local earnings;
- A bedroom factor should be applied so that, all other things being equal, smaller properties would have lower rents.

It should be noted that formula rents are subject to rent caps which can override the formula rent.

In 2011, the Conservative-Liberal Democrat coalition government at Westminster introduced the concept of 'affordable rent' as a form of intermediate rent. This allows rents, inclusive of service charges, to be set at up to 80 per cent of market rents (Wilson and Bate, 2015).

In October 2017, the Conservative government announced its intention to set a long-term rent settlement for social and affordable housing in England, allowing an annual rent increase of up to the Consumer Price Index (CPI) from the previous September plus 1 per cent per annum across the sector. The aim was to create a more stable financial environment for social landlords, providing greater certainty for future planning and investment in additional homes. Due to higher than anticipated levels of inflation, the government adjusted this policy to protect social housing tenants from very high rent increases. Since 1st April 2020, rents for social housing in England have been set in accordance with the Government's Direction on the Rent Standard (UK Government, 2019). This was updated by the Direction on the Rent Standard 2023 and was supported by a policy statement on rents for social housing published by the last Conservative government (MHCLG, 2022).

In 2023–24, the CPI+1 per cent limit on rent increases was replaced with a 7 per cent cap for both social and affordable rents in England, excluding supported housing (RSH, 2024). Despite the cap, evidence indicates that average rents for general needs social rented housing rose by 7.2 per cent during the year (ibid). LARPs generally charged lower rents than PRPs (ibid).

In October 2023, MHCLG launched a consultation on the future of social housing rent policy in England. Although the consultation has now closed, no government analysis of the responses has been published at the time of writing (MHCLG, 2023).

Several organisations have, however, made their own responses publicly available. The National Housing Federation (NHF), representing housing associations in England, broadly welcomed the government's proposals but called for further action on both rents and grant funding (NHF, 2023). They argued that additional measures are needed to accelerate the supply of new homes, improve existing stock, and maintain rent affordability. The NHF also noted the worsening financial position of English housing associations, which has reduced their capacity for future investment. They specifically recommended policy changes for supported and older people's housing and expressed a preference for a 10-year rent settlement (rather than five years) to provide greater long-term financial certainty for investment and business planning.

The Local Government Association (LGA) similarly supported a minimum 10-year rent settlement, citing the need to maintain and strengthen the stability of HRAs (LGA 2023). The LGA also argued that local authorities should be permitted a minimum annual rent increase of CPI + 1 per cent and called for the reintroduction of rent convergence to formula rent levels.

The Chartered Institute of Housing (CIH) supported the government's proposal for annual CPI + 1 per cent increases but stressed that this would not be sufficient to deliver the stability and investment needed in the sector (CIH, 2023). Like the LGA, the CIH advocated for rent convergence to formula rents and a 10-year rent policy framework to ensure fairness, consistency, and investment capacity.

In 2024-25, the CPI+ 1 per cent rent-setting formula was reinstated and extended for a further year by the incoming Labour government.

As part of the June 2025 the Chancellor of the Exchequer announced a 10-year settlement, permitting social landlords in England to increase rents by CPI+1 per cent each year for 10 years from April 2026. The Housing Minister has subsequently written to social landlords, confirming these arrangements, arguing this will provide greater certainty for social landlords, lenders and investors, whilst ensuring the protection of tenants (MHCLG, 2025). He also announced the intention for a convergence mechanism as part of the new rent settlement, the details of which will be confirmed later in the year.

4.3. Social Housing in Scotland

As of 31 March 2023, there were 626,928 homes in the social housing sector in Scotland. Of this total, local authorities owned 52 per cent, while housing associations owned the remaining 48 per cent (Scottish Government, 2023).

Scotland has 32 unitary local authorities, 26 of which continue to own and manage council housing. The remaining six transferred their housing stock to newly formed not-for-profit landlords between 2002 and 2006. Among these was Glasgow City Council, which transferred approximately 81,400 homes to the newly established Glasgow Housing Association. This organisation is now part of the Wheatley Group, Scotland's largest social landlord. Wheatley Homes Glasgow is the Group's largest subsidiary and also operates across several other parts of Scotland (ibid).

4.3.1. Rent setting mechanisms in Scotland

Unlike England and Wales, Scotland does not have a nationally driven rent-setting or rent increase policy for social housing. The Scottish Government's Scottish Social Housing Charter sets the standards for social landlords in Scotland, providing the basis for tenant and customer expectations and for the Scottish Housing Regulator (SHR) to assess how social landlords in Scotland are performing (Scottish Government, 2022a). Although there have been occasional debates – particularly in light of England's rent convergence policies – around adopting a more consistent national approach, no such policy has been implemented in Scotland over the past 25 years.

Scottish social housing providers are required to consult with tenants each year on proposed rent increases. Many landlords also undertake rent harmonisation exercises from time to time, particularly where their housing stock comes from different sources or time periods – such as through stock transfers or transfers of engagements – necessitating realignment for fairness.

In 2022, the Scottish Government introduced a rent freeze through the Cost of Living (Tenant Protection) Act, which effectively froze social housing rents until the end of March 2023. However, towards the end of 2022, Scottish Ministers reached an agreement with social landlords on implementing below-inflation rent increases for 2023–24 (Scottish Government, 2022b).

The Confederation of Scottish Local Authorities (CoSLA) and the Scottish Federation of Housing Associations (SFHA) issued statements outlining their members' rent intentions for 2023–24. CoSLA committed to keeping average rent increases for local authority housing to no more than £5 per week. Meanwhile, the SFHA and the Glasgow and West of Scotland Forum of Housing Associations reported planned average rent increases of 6.1 per cent for housing associations.

According to the Scottish Housing Regulator (SHR), social landlords in Scotland planned to raise average weekly rents by 5.07 per cent in 2023–24 (SHR, 2023). This included an average increase of 3.8 per cent for local authorities and 5.34 per cent for housing associations. Within the local authority sector, proposed rent increases ranged from 0 per cent to 6.42 per cent, with a median increase of 4 per cent. Among housing associations, the range was broader – from 0 per cent to 8 per cent – with a median of 5 per cent.

Compared to Wales, Scotland has a larger and more diverse social housing sector, with a greater number of individual social landlords. The data suggests that rent increases in Scotland varied more widely across providers than those seen in Wales.

The Scottish Housing Regulator (SHR) has recently published its analysis of audited financial statements for Scottish housing associations for 2023–24. For the third consecutive year, average rent increases remained below both the CPI and the RPI, with an average increase of 6 per cent in 2024–25. Turnover in the sector rose by almost 6 per cent to £2.11 billion; however, operating costs increased more sharply by 7.07 per cent to £1.75 billion. As a result, operating surpluses fell marginally – by less than 1 per cent – to £364.45 million. The report noted that despite falling inflation, the financial position of housing

associations continued to weaken in 2023-24, further reducing financial headroom (Scottish Housing Regulator, 2024a).

In Wales, Community Housing Cymru recently published the global accounts for Welsh housing associations for 2022–23. Although the data is not directly comparable, it reflects similar trends, with rising costs outpacing turnover growth and leading to lower operating margins (Community Housing Cymru, 2023).

In Scotland, social landlords are legally required to consult tenants and consider their views before deciding on rent increases. Qualitative research commissioned by the Scottish Government and published in 2024 explored housing affordability in the rented sectors. It found that while many tenants experienced financial strain in meeting housing costs – often making trade-offs to do so – most felt the rent increases over the previous year were reasonable and affordable. Some landlords provided tenants with options during consultations, presenting trade-offs between different levels of rent increase and corresponding levels of service (Scottish Government, 2024). The SHR periodically reviews rent policies for their consistency, suitability, and alignment with good practice. Trade bodies and peer networks also support landlords in developing well-designed rent structures.

The SHR's 2022 thematic review highlighted growing financial pressures on Scottish social landlords – such as rising costs, interest rates, and investment in new or upgraded housing – which influence the rental income they require. Factors like stock condition, service levels, and borrowing also play a role (Scottish Housing Regulator, 2022).

While similar pressures exist in Wales, Scotland's more fragmented sector allows greater autonomy in rent setting. In contrast, a 2019 independent review in Wales found significant reform was still needed in rent-setting systems, governance, and evidence use before granting landlords similar freedoms (Welsh Government, 2019).

4.4. Social housing in Northern Ireland

Social housing in Northern Ireland is distinct from other UK nations, with the Northern Ireland Housing Executive (NIHE) continuing to dominate the sector. NIHE owns and manages around 83,000 homes – nearly two-thirds of the total social housing stock.

According to the Northern Ireland Federation of Housing Associations (NIFHA, 2024), housing associations own and manage over 60,000 homes. However, this figure includes over 10,000 co-ownership dwellings (typically classified as owner-occupied) and around 5,000 shared bedspaces. The sector currently comprises 20 registered housing associations – a significant decline from 40 in 2000 (Mackay and Williamson, 2001).

New homes are delivered through the Social Housing Development Programme, administered by NIHE's Development Programme Group with grant funding. Housing associations are regulated by the Department for Communities (DfC), which oversees funding, policy, regulation, and guidance for the sector.

4.4.1. Rent setting mechanisms in Northern Ireland

The NIHE operates a rent-setting system introduced in the early 1980s. Based on Glasgow University research, the NIHE Rent Scheme uses a points-based system to determine rents, awarding points for dwelling characteristics such as age, type, size, and amenities. Notably, location and condition were deliberately excluded to ensure consistent rents for comparable properties across Northern Ireland.

Points-based rent systems were once widespread in the UK – used by over half of English local authorities in the late 1990s – though less so in Scotland (Walker and Marsh, 2000; Moore et al 2003). Despite their theoretical transparency, such systems often led to inconsistencies in rents between neighbouring authorities. The shift to housing associations and mixed public-private funding introduced more variation in rent levels, prompting government-led rent restructuring policies in other UK nations to promote fairness and rent convergence.

In 2023-24, the average NIHE net weekly rent was £74.22, while the 2022-23 average housing association rent was £100.97. These figures are not directly comparable as housing association rents include rates and service charges, while NIHE rents do not (Department for Communities, 2024).

Each year, NIHE rent increases (if approved by the Minister for Communities) are calculated by multiplying the property's points total by a new point value aligned with the approved percentage increase. In early 2024, the NIHE proposed a CPI+ 6 per cent annual rent increase over three years from 2025-26 to 2027-28 (equivalent to 7.7 per cent in year one), but this has not been approved. It is now expected that NIHE rents will follow the English model of CPI+ 1 per cent increases (NIHE, 2024).

Since the introduction of mixed funding in the early 1990s, Northern Ireland's housing associations have had greater freedom in setting rents for new homes, no longer bound to the NIHE's points system. However, older tenancies (pre-16 September 1992) still follow the original NIHE scheme (DfC, 1992). For other non-mixed funded re-lets, housing associations have discretion but often align their rents with NIHE's.

Today, most housing association rents are for mixed-funded homes, with rents set scheme-by-scheme based on loan repayments, management and maintenance costs, and allowances for voids. For homes built after 1 July 2018, rents must not exceed 90 per cent of the LHA for the relevant Broad Rental Market Area. If this cap affects scheme viability, associations can offset the impact by pooling rents with other schemes developed within the same financial year.

4.5. International Perspectives on Social Housing Rent Setting

Social housing systems vary widely across the world, reflecting differing views on its role – whether as a universal tenure or targeted primarily at lower-income households.

A recent OECD and European Union (EU) survey found that 39 of 43 participating countries reported having some form of social housing. However, there is significant variation in how

social housing is defined, structured, and delivered, even within individual countries. In some cases, several different types of non-market housing exist side by side (OECD, 2024).

The origins of social housing are largely European, but even across Europe, national models differ in scale, government involvement, and subsidy mechanisms. Over time, the level of state support and the structure of provision have changed, often in response to economic pressures or housing need.

Eurostat's Housing in Europe 2024 edition provides a comprehensive overview of housing trends across EU member states, including data on affordability, tenure, and housing conditions (Eurostat, 2024).

Housing Europe, the European Federation of Public, Co-operative and Social Housing, represents national and regional housing federations across 31 countries. Its research arm, the Housing Europe Observatory, monitors trends in the sector and publishes comparative data. The State of Housing in Europe (2023) report covers 17 European countries (including Northern Ireland) and presents analysis of public, social, and co-operative housing. While it highlights limitations in data availability and quality, the report shows that some European countries have a significantly larger share of social housing than the United Kingdom (17.1 per cent in 2022 – see table 4.1 above). For example:

- The Netherlands: 29 per cent
- Sweden: 24 per cent co-operative housing and 16 per cent public renting
- Denmark: 27 per cent
- Austria: 24 per cent

Across Europe, social housing sectors face shared challenges: growing demand, shortages of affordable homes, increasing construction and renovation costs, and the broader impact of the cost-of-living crisis, particularly rising prices for housing, food, and energy (ibid).

4.5.1. Rent Setting Mechanisms in European Social Housing

Over a decade ago, Whitehead (2014) identified three main methods for funding social housing:

- rental income from current tenants;
- borrowing, repaid over many years with interest;
- external financial support, primarily from government sources. This includes capital grants, subsidised borrowing, revenue subsidies to landlords or tenants, developer contributions, and current or future tenant rents.

Subsidies play a crucial role in reducing the reliance on rental income and borrowing, supporting both the construction of new homes and the maintenance of existing stock. Whitehead also noted that rent-setting practices vary across Europe, influenced by factors such as dwelling value, construction costs, or household incomes – all of which are applied in different contexts across the continent (ibid).

The OECD (2024) similarly highlights diverse rent-setting approaches in OECD and EU countries, grouping them into four broad categories:

- income-based rents linked to tenant incomes;
- market-based rents aligned, at least partially, with private market rates;
- cost-based rents calculated to recover the cost of construction or acquisition;
- utility-based rents reflecting dwelling characteristics such as size, amenities, and location.

Many countries (including, as we have shown, parts of the UK) use a blend of these approaches in setting social rents. The OECD report provides an overview of the approaches to rent setting, and the systems used to determine rent increases on a country-by country basis (OECD, 2024). The OECD analysis also reports on the different eligibility criteria used in different countries to determine eligibility for social housing (including criteria for households to remain in the sector) and for the priority given to different households in allocating social housing (ibid).

Housing Europe (2021) explored cost-based rent-setting through case studies in Austria, Denmark, and Finland. The report found that this model can support rent affordability, but its effectiveness depends on how it is applied. In Austria and Denmark, cost-based rents are set at the estate or development level, whereas in Finland, they are determined at the level of the housing provider. The report suggests that long-term affordability is more likely when cost-based systems are applied at the organisational level and over an extended period.

5. Conclusions and recommendations

5.1. Summary of Main findings

This report aimed to provide insight into the rent-setting behaviour of Welsh social landlords in recent years. Overall, the data suggested that social landlords in Wales generally set rents at or close to the maximum permitted under the Rent Standard cap. While there were exceptions each financial year – where some social landlords set rents below the cap – these were often followed by increases in subsequent years that brought rents back in line with the cap. Only one provider consistently reported setting rents below the cap.

Supplementary analysis using StatsWales data showed a steady and controlled rise in social rents across different sizes of property. This indicated that the Rent Standard cap played a positive role in limiting rent increases.

This study did not attempt to construct a counterfactual scenario, so it was not possible to say with certainty how rents might have changed had the Rent Standard cap not been in place. However, given the general trend of social landlords setting rents at the cap, it could reasonably be inferred that the cap helped to moderate rent increases. The text-based responses provided in the MI data suggested that, in the absence of a cap, some social landlords might have raised rents further. However, this should be considered alongside the fact that for some financial years, a small number of social landlords did set their rents below the maximum allowed. The analysis found that this was most evident among LAPs, where rent-setting behaviour appeared to be influenced by a combination of democratic oversight and broader budgetary considerations.

A review of the wider evidence indicated that approaches to setting social rents varied across the UK. While the context in Wales was perhaps most comparable to that of England, it remained distinctive – both in the composition of the sector, the ways in which social landlords approached rent setting and in terms of how the Welsh Government chose to regulate rents.

Replicating the more distinctive Scottish approach – where there is no nationally driven rent-setting policy for social housing – would likely be inappropriate in Wales. Scotland has a diverse social rented sector, as well as specific and distinctive legal and policy frameworks that differ considerably from Wales.

Northern Ireland similarly has a unique context in that a higher proportion of social housing provided by and managed through government.

Although England shares many similarities with Wales, key differences are evident. In particular, the increasing prevalence of affordable rent housing in England, which has replaced social rented housing in recent years, and the greater diversity of providers distinguish it from the Welsh social rented sector.

Comparisons with other European nations highlighted the common affordability challenges facing social housing providers across OECD countries. Subsidy, borrowing, and rental income all formed essential components of modern social housing funding, and Welsh

social landlords are already required to take these factors into account in their financial planning. Future increases in any of these areas would need to be carefully considered – both in Wales and across other OECD nations – to ensure that affordability remained a central priority.

5.2. Implications for tenants and social landlords

This section provides some brief reflections on the implications of the research for tenants, social landlords and Welsh Government.

5.2.1. Implications for Tenants

The findings of this report indicate that the Rent Standard cap played an important role in controlling social rents and ensuring affordability. Without it, the analysed data suggests that rents may have increased further. The widespread use of the Living Rent methodology, which primarily uses local earnings data, may not effectively capture the wider cost pressures tenants likely faced during the cost-of-living crisis. This increased the importance of tenant engagement exercises during this period to assess wider affordability.

Although the analysis showed that tenants are generally consulted on rent setting, the nature and depth of this consultation varied between providers. As a result, some social housing residents had more influence over future rents than others.

The affordability challenges faced by tenants in Wales are not unique; they are shared with tenants in other parts of the UK and Europe. Nonetheless, the way social landlords in Wales respond to affordability pressures and the governance framework in place for the sector is unique. There are clear expectations in the Rent and Service Charge Standard that social landlords in Wales consult with their tenants and take into account affordability when setting rent. This expectation is backed up by more direct measures within the Standard that limit the amount by which social landlords can raise their rents.

Addressing future affordability challenges will require close collaboration between tenants, social landlords, and the Welsh Government to balance interests and ensure rents remain affordable.

5.2.2. Implications for Social landlords

Social landlords have generally maximised their rents in line with the Rent Standard cap in recent years. However, a small number of social landlords have set their rents below the cap in specific financial years. This demonstrates the diversity in the sector and the need for future regulation to account for the multiple factors that inform rent-setting approaches.

The Living Rent approach now appears to be dominant in rent-setting. However, its focus on local earnings and equivalisation methodologies does not always account for the wider cost pressures that tenants might face. This should be considered if the Living Rent approach continues to underpin rent-setting behaviour.

Social landlords continue to face specific operating pressures. At the same time, there is ongoing pressure to ensure social rents are mindful of local housing markets and tenants'

ability to pay. Ongoing monitoring is likely to be necessary to understand the extent to which these pressures decrease or increase and how they continue to impact the sector over time.

5.3. Implications and recommendations for the Welsh Government

The analysed data supported the view that rent setting in Wales needs to carefully balance tenant affordability with the operating costs social landlords face. This echoes earlier findings from the independent review of affordable housing supply (Welsh Government, 2019).

The variable nature of the comprehensiveness of the MI data suggests that future self-reporting could be improved as part of the Welsh Government's ongoing monitoring and regulation activity.

Social housing in Wales is provided within a distinctive governance context. A review of the available evidence cautioned against radically changing the current regulatory model. It is inconclusive that adopting models from elsewhere would improve affordability for tenants, given the distinctive socio-economic conditions, legal frameworks, and rent-setting approaches pursued by Welsh social landlords.

Given the scope and scale of this research, it is not considered appropriate to make wide-ranging recommendations. However, based on the analysed data, six specific recommendations could be taken forward by the Welsh Government.

Recommendation 1: It is recommended that the Rent Standard cap be reviewed and taken forward by Welsh Government. There is potential for affordability to be adversely impacted without a cap being in place. Ongoing consultation between tenants, social landlords and Welsh Government will be crucial for ensuring the cap is fair and sustainable.

Recommendation 2: The MI forms showed that social landlords in Wales generally used a Living Rent approach to set their rents, though the specific methodologies vary between providers. To reduce reliance on aggregated data – such as local area earnings – which may overlook important contextual factors affecting housing affordability, it is recommended that the Welsh Government work with social landlords to develop a framework that more clearly and consistently incorporates tenant consultation into rent-setting processes. Clearer guidance would help ensure tenants are meaningfully involved in decisions about annual rent increases.

Recommendation 3: The current approach to rent-setting in Wales requires social landlords to adequately consider affordability when developing their rents and puts in place specific limits on how much rents can increase. Overall, rent increases appear to remain relatively controlled and consistent across local areas. However, some differences do remain in how social landlords set rents, even within local authority areas. To promote fairness¹¹, the Welsh Government should strengthen and clarify

¹¹ In the context of these recommendations 'fairness' refers to rent outcomes that are equitable for tenants, with rent-setting decisions based on transparent processes that are clearly communicated to tenants.

the Rent Standard to support more consistent rent-setting within areas and between social landlords. The Welsh Government's proposed changes to the Rent Standard and ongoing consultation should explore how the Welsh Government's proposed affordability principle can be implemented at a local level¹²

Recommendation 4: The current Regulatory Framework emphasises the need for social landlords to engage with tenants and ensure their housing offers value for money. However, there is significant variation when it comes to developing affordable rents. It is recommended that further work is undertaken to identify best practices for tenant engagement and demonstrating value for money. Improving these practices could help ensure that housing offers value for money and help inform future rent-setting guidance.

Recommendation 5: The monitoring returns provided by the Welsh Government were of variable quality. Given the reliance on self-reporting within the Regulatory Framework, further efforts should be made to improve and standardise the information collected from these monitoring returns. In particular, providers should be encouraged to check that the data submitted is complete, accurate, and reflective of both current and planned activities. This could support a more comprehensive assessment of rent-setting behaviour, the factors social landlords considered when setting rents, and the challenges they face. In turn, this would enable the Welsh Government to develop a more informed view of the sector.

Recommendation 6: The available evidence emphasises the context-specific nature of social housing across the nations and regions of the UK, as well as more widely in Europe. For this reason, our research cautioned against radically altering the current approach to regulation and rent-setting in Wales. However, there is still scope to learn useful lessons from other places. It is recommended that the Welsh Government continue to engage with and be mindful of alternative approaches, considering and evaluating if these can inform future improvements in Wales, while furthering the Welsh Government's objectives of ensuring affordability for tenants.

¹² Welsh Government opened a consultation on a [new rent and service charge standard for Wales](#) in June 2025.

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Annex A: Monitoring return form template

Welsh Government Social Housing Rent Standard Annual Self-Certification Monitoring Return

This form is in two parts, part one (mandatory) refers to compliance with the [rent standard](#) and part two (voluntary) relates to information required as part of the wider rental agreement agreed and outlined in the Notification Letter (attached below) dated December 202x from the Welsh Ministers.

The form is to be completed by all social landlords.

- **Please return the form to Welsh Government by 28 February 202x to HousingQualityStandards@gov.wales**

Name of Social Landlord	
WG RSL registration number (if applicable)	
Date return completed	

PART ONE (MANDATORY): Please answer all the following Questions relating to your rental income

Questions for year APRIL 202x/2x	
Q1. Please confirm the overall percentage increase you applied to your rents at April 2021 and stock numbers on the 31 st March 2021. <i>(Please note - Welsh Government Rent Standard permits a maximum ceiling of x.x% (CPI+1%) for 202x/2x)</i>	
Q2. Please confirm that the level of rent for an individual tenant did not rise more than CPI+1% plus an additional £2	
Questions for year APRIL 202x/2x	

Q3. Please indicate the estimated gross annual rental income for 202x-2x for general needs and sheltered self-contained dwellings based on revised rents from April 202x and stock numbers on the 31 st March 202x	
(Definition of 'estimated gross annual rental income' is the rental income you expect to receive for your whole portfolio of properties, including any new builds you are anticipating in year, and regardless of whether properties are occupied or void)	
Q4. Please confirm the overall percentage increase YOU INTEND to apply to your rents from April 202x <i>(Welsh Government Rent Standard permits a maximum overall increase of x.x% (CPI only) for 202x/2x)</i>	

Q5. Please confirm you have a local rent and service charge policy in place.	
We have a rent policy and service charge policy in place. The rent policy for a property is based on size, type and affordability levels.	
Q6. Please tick/ indicate any of the following affordability models used when assessing your rents.	
a. Joseph Rowntree Living Rent Model	
b. CHC's / Housemark Affordability tool	
c. Other models – please name	
Q7: Please outline the factors you considered when assessing affordability when you set your rents and service charges for the 202x/2x rent year. Include details of how affordability for your tenants was taken into account and influenced the approach taken.	

Please limit your answer to 250 words

Q8: Please outline the tenant involvement (engagement, consultation and feedback) undertaken and how feedback received has influenced your rent setting policy for the 202x/2x rent year.

Please limit your answer to 250 words

Q9: Please state the date your Board/Council/ Committee made or ratified the final decision on your rent setting for 202x/2x

Q10: Please explain how your annual assessment on operating costs and cost efficiencies has impacted on your rent setting decision for April 202x/2x

Please limit your answer to 250 words

Q11: Please provide any other comments or raise an issue in relation to your rent setting exercise for April 202x/2x *Please limit your answer to 250 words*

PLEASE NOTE WE MAY ASK FOR FURTHER INFORMATION OR CLARIFICATION ON ANY OF THE ABOVE MATTERS

PART TWO – Voluntary

Please provide an update on the following jointly agreed initiatives:

a) End all evictions into homelessness

Q12: Please confirm that you are strengthening your approaches designed to ensure you minimise all evictions and deliver on a new agreement not to evict into homelessness

Q13: If you would like to provide further details please do so here:

b) Undertake a standardised tenant satisfaction survey

Q14: Confirm that you will complete a tenant satisfaction survey, including the core questions, for submission by 28 February 202x

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c) Standards

Q15: Please confirm that all new build development financed by Welsh Government Housing Capital Funding, will meet the new housing quality standard 'WDQR 2021'.

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d) EPC A

Q16: Please confirm that all new build financed by Welsh Government Housing Capital Funding will achieve an energy efficient standard of EPC A and above from April 2021.

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Name	
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Position	
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This must be either the Section 151 Officer for a Local Authority or the Director of Finance for a Registered Social Landlord

Date	
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Please submit your return to: HousingQualityStandards@gov.wales by 28 February 202x