



**Social Housing &
Housing Associations Market
Research & Analysis
UK 2012**

REPORT SAMPLE

**UK Social Housing & Housing Associations Market Size & Review 2006-2012;
PEST Analysis & Key Trends 2006-2016; Housing Associations Profiles & Key
Financials; Market Forecasts to 2016**

2nd Edition

February 2012

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1. Introduction to Research & Analysis Reports

1.1 Key Features & Benefits of this Research & Analysis Report

MTW's "Research & Analysis" market reports provide an independent, comprehensive review of recent, current and future market size and trends in an easy to reference format. Each report provides vital market intelligence in terms of size, key trends and influences and future prospects for the market. In addition, rankings by turnover, profit and other key financials for the market leaders are provided as well as a 1 page profile for each key player in the market. Contact, telemarketing & mailing details are also provided for each company to enable the reader to quickly develop sales leads.

Based on company sales returns which provide higher confidence levels and researched by market research professionals with experience in the industry, MTW's *Research and Analysis* reports are used as a foundation for coherent strategic decision making based on sound market intelligence and for developing effective marketing plans. MTW reports can also be used as an operational sales and marketing tool by identifying market leaders, enabling the reader to quickly grow sales to new clients and focus marketing budgets.

This report includes:-

- **Market Size, PEST & Trends – Historical, Current & Future**

Based on sales data from a representative proportion of the industry, this report provides market size by value over a ten-year period. As they are based on quantitative data as well as qualitative input from the industry, our reports are more accurate than other qualitative based reports and offer better value for money. By combining the best of both quantitative and qualitative input, we offer our clients greater confidence in our market forecasts as well as discussing key market trends and influences from a qualitative perspective.

- **Industry Structure Analysis**

The report identifies the key characteristics of the structure of the industry, analysed by turnover bands, credit rating, and performance over the last 12 months, age of companies, employee bands and geographical share by UK region. This analysis enables the reader to identify the key driving forces behind current market demand and adapt business tactics accordingly. Based on quantitative, statistically valid research, the reader is able to undertake strategic decisions with greater confidence as well as basing marketing strategies on solid market intelligence.

- **Market Leaders Ranking**

This report identifies the key players in the market and ranks them by a number of criteria, including turnover and profitability. This enables the reader to identify the most relevant potential key customers in a market, understand their current position in the market and quickly identify new targets. Also, MTW provide a turnover estimate for every company included in the report, enabling the reader to develop market share estimates.

- **Company Profiles & Sales Leads**

This report includes a 1 page company profile including contact details for developing fast sales leads; 4 years of the most recent key financial indicators; and MTW's 'at a glance' chart, enabling the reader to quickly gauge the current and historical financial health of a competitor or potential client.

- **Budget Allocations, Procurement & Specification Criteria**

This report includes levels of expenditure for the social housing providers to 2016, with further detailed information on current specification and procurement practices and trends. This information enables product suppliers, distributors and contractors to focus their marketing activities and target those social housing providers more likely to purchase goods & services

- **Relevant Research, Saving You Time**

MTW Research have been researching and writing market reports in these sectors since 1999 and as such we are able to develop a company listing which is more relevant to the market, rather than automatically selecting companies to be included by industry code. Our reports represent excellent value for money and don't bombard you with irrelevant financial data; they are designed to enable you to engage in fast and effective market analysis. We focus on providing what's important in an easy to reference and use format.

2. UK SOCIAL HOUSING MARKET 2006-2016

2.1 SOCIAL HOUSING MARKET DEFINITION

The UK social housing market is defined as consisting of houses, apartments and other dwellings which are funded in full, or part by public expenditure either through central Government or Local Authority funding. Primarily, these dwellings are provided by one of the following:-

- Local Authority owned and managed dwellings for social renting
- Arms Length Management Organisations (ALMOs) managing local authority owned dwellings for rent.
- Housing Associations / Registered Providers of Social Housing.

Arms Length Management Organisations (ALMOs) are defined as not for profit companies established by local authorities to manage and improve their housing stock. ALMOs are owned by local authorities and are managed by a board of directors. Ownership of the housing stock itself normally remains with the Local Authority and tenants remain secure tenants of the Local Authority.

Housing Associations are private, not for profit organisations that provide low cost social housing. They are now the UK's major provider of social housing and are regulated by the government and receive public funding as well as having the ability to raise their own funds. A substantial proportion of Housing Associations are Industrial and Provident societies, a legal entity for voluntary organisations in the UK regulated by the Financial Services Authority, though some are also limited companies without share capital.

This report specifically excludes affordable housing schemes which are financed wholly by the private sector.

Issues reviewed in the report include stock of dwellings by key organisations, new build levels, identification of the leading housing associations and ALMOs in England, Scotland, Wales and Northern Ireland; procurement issues including growth in procurement consortia and framework partnering; key specification criteria; the changing role of ALMOs and other key issues impacting the social housing market now and in the future. The report provides a valuable strategic insight for building product and construction material suppliers and contractors targeting this sector as well as identifying sales leads for the leading housing associations in terms of funding and stock levels.

The methodology for this report includes primary research with Housing Associations, manufacturers, contractors and other trade sources. This is supported by secondary research from a wide range of sources including trade journals, company reports, Companies House, Government statistics, trade associations, company websites and existing knowledge in this sector. MTW Research have been writing reports and producing databases on the UK Housing Association and Social Housing Market for more than 15 years.

2.2 EXECUTIVE SUMMARY & MARKET OVERVIEW

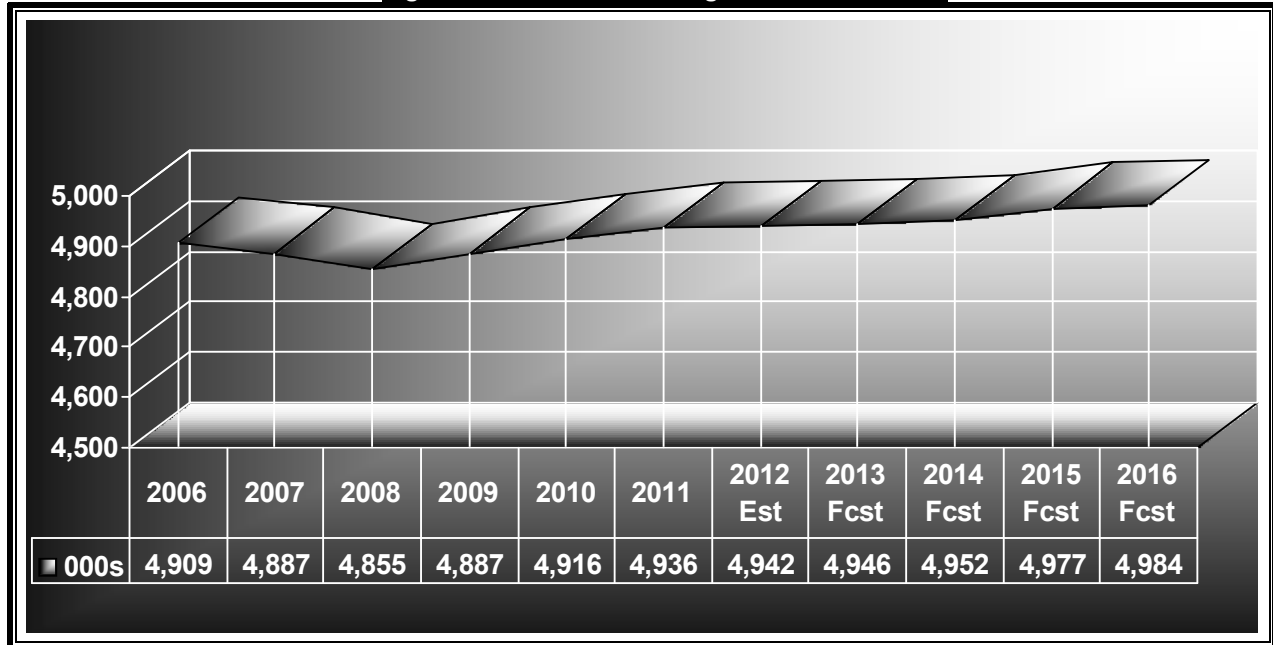
The total social housing stock in the UK is estimated to stand at around 4.9 million dwellings in 2012 representing around 18% of the total dwellings in the UK. Social housing stock is expected to reach some

2.3 SOCIAL HOUSING MARKET SIZE & TRENDS 2006-2016

In 2012 it is estimated that there are just over 27 million dwellings in the UK, including privately owned, privately rented and publicly owned homes. In 2012 just over 18% of the total dwellings in the UK are accounted for by social housing stock owned either by local authorities or Registered Providers of Social Housing.

The following table illustrates the estimated total stock of social housing in the UK:-

Figure 1: UK Social Housing Market 2006 - 2016



Source: MTW Research / Trade Sources

The UK social housing market primarily consists of houses and flats owned by local authorities and Housing Associations. As illustrated the social housing stock in the UK is currently estimated to

As the above chart illustrates, the social housing market has

The following chart illustrates the social housing split by Housing Associations and Local Authority in 2012:-

Figure 2: UK Social Housing Share by Housing Associations and Local Authority 2012

Chart Redacted in Sample

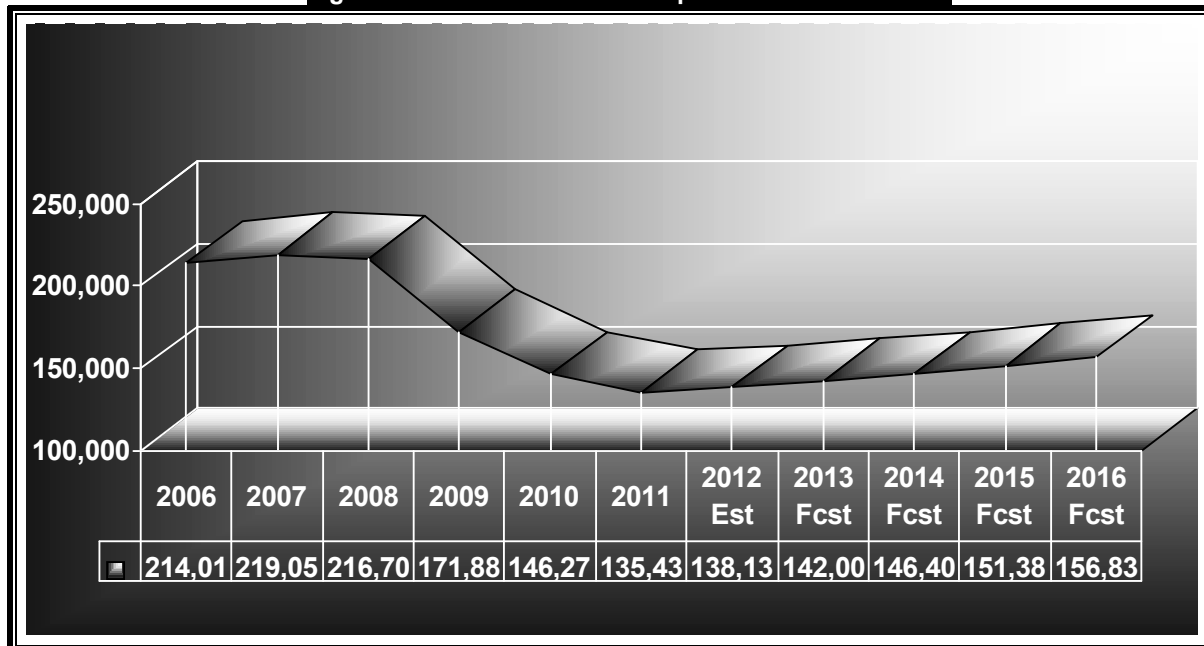
Source: MTW Research / ONS

The above chart illustrates that Housing Associations in the UK manage approximately

2.4 HOUSEBUILDING MARKET 2006-2012

The following chart illustrates the total levels of new build home completions in the UK from 2006 with forecasts to 2016:-

Figure 6: Total New Home Completions UK: 2006-2016



Source: MTW Research / ONS

As the above chart illustrates there were a total of 135,430 new build completions in 2011, this represents a decline of some 37% over the past 6 years. This decline was primarily due to the recession and the subsequent effects on the property market, namely the fall in house prices and a lack of mortgage availability.

Forecasts indicate that the new build sector is likely to experience a sustained level of growth over the next 4 years with increases of 2-3% per annum expected as the economic climate stabilises. The growth is likely to be aided by the introduction of the New Build Indemnity Scheme which offers taxpayer backed 95% mortgages and is likely to help the estimated 100,000 first time buyers that are currently unable to get onto the housing ladder because of the need for large deposits.

In addition, the government has released public sector land with the capacity for 100,000 new homes and the New Homes bonus allocations for 2012-13 totalling £413 million will reward local authorities with a bonus equal to the national average for the council tax band on each additional property they build/bring back into use. There is also a £400 million initiative to support firms in need of development finance on "stalled" development/construction sites. As the population rises the number of households is set to rise by an estimated 230,000 households per year, the sustained demand for housing is also likely to prompt a steady increase in supply.

The following table illustrates the new build split by provider in the UK by 2011:-

Figure 7: UK New Home Build Activity Split by LA, HA & Private 2011

Chart Redacted in Sample

Source: MTW Research / Trade Sources

As illustrated a majority of new build activity in the UK is in the private sector with

The following chart illustrates the number of Housing Association new build completions in the UK from 2006 with forecasts to 2016:-

Figure 8: UK Housing Associations New Build Housing Completions 2006 - 2016

Chart Redacted

Source: MTW Research / ONS

As illustrated, Housing Association new build activity represents some

The following table illustrates the total Local Authority expenditure on selected components to ensure dwellings meet the Decent Homes Standard:-

Figure 12: Local Authority Expenditure by Key Building Product/Sector 2006-2011 £m

	2006 £M	2007 £M	2008 £M	2009 £M	2010 £M	2011 £M
Central heating						
Insulation						
Windows						
Rewiring						
Bathrooms						
Kitchens						

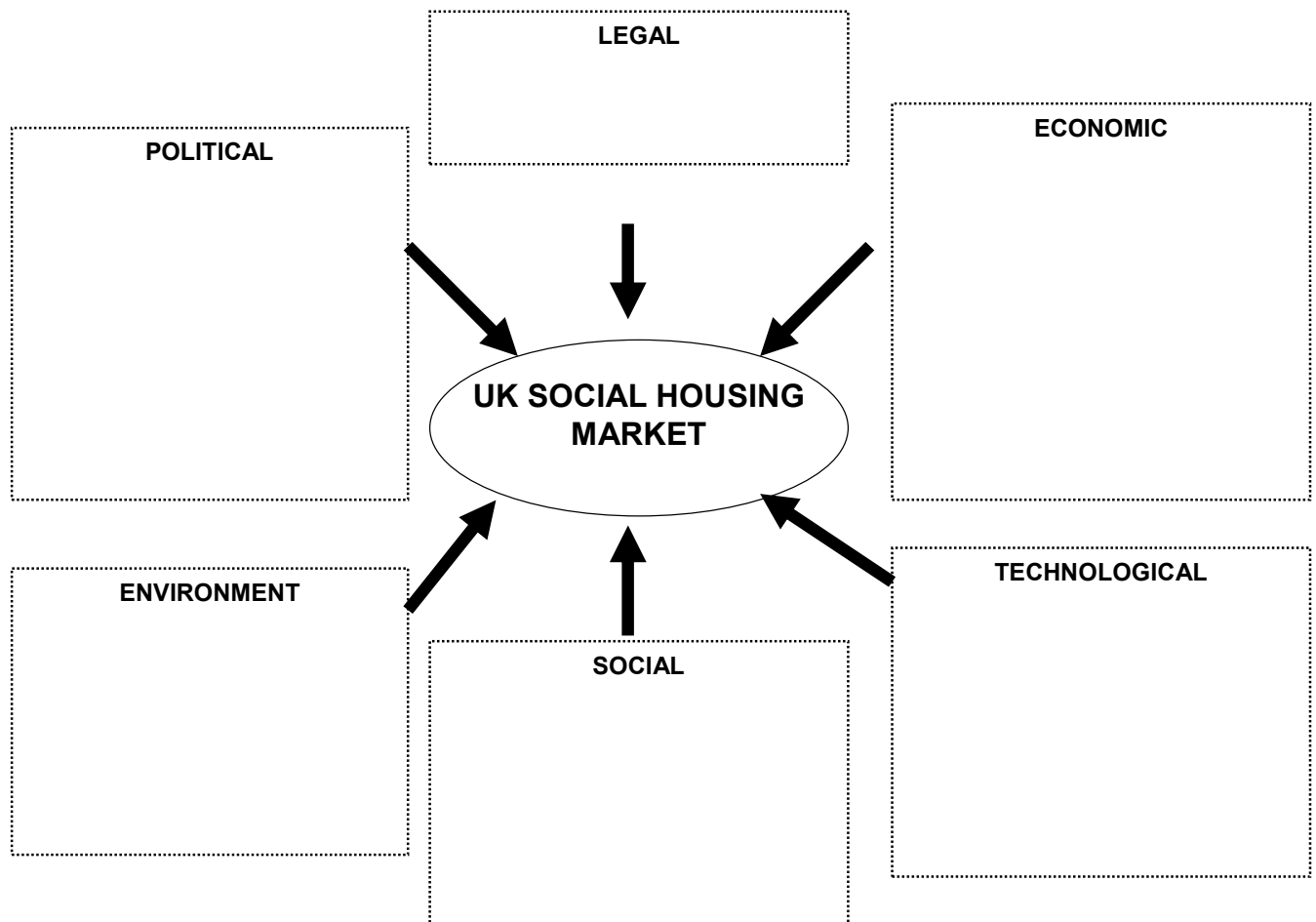
Source: MTW Research(Figures Redacted in Sample)

2.5 KEY MARKET TRENDS IN THE UK SOCIAL HOUSING MARKET

2.5.1 PEST Analysis – Illustration of Key Market Forces

There are a large number of macro market issues and trends which directly or indirectly influence the UK social housing market. These issues typically relate to political, legal, economic, environmental, social and technological factors. The following diagram provides a brief overview of some of these key issues which are currently impacting the market at present and those which may stimulate or dampen market growth in the future:-

Figure 17: PEST Analysis for UK Social Housing Market in 2012



Source: MTW Research Strategic Review 2012

Whilst the above diagram is by no means exhaustive, it provides an illustration of some of the key issues impacting the market at present and in the future.

3. UK HOUSING ASSOCIATION MARKET 2006-2016

Housing Associations are private, not for profit organisations that provide low cost social housing. They are the UK's major provider of social housing and are regulated by the government and commonly receive public funding. A majority of Housing Associations are Industrial and Provident societies, a legal entity for voluntary organisations in the UK regulated by the Financial Services Authority.

The overall social housing market has

3.1 ENGLISH HOUSING ASSOCIATIONS MARKET 2006-2016

3.1.1 Top 100 English Housing Associations by Stock Owned

The following table details the largest private registered providers of social housing in England ranked by total stock owned or managed:-

Figure 45: Top100 Housing Associations Ranked by Stock Owned & Managed – England 2012

Rank	Rank for Owned only	PRP name and code	PRP stock		
			Owned	Managed	Owned & Managed
1	2	Housing Association Names Redacted in Sample	48,360	22,528	70,888
2	1		58,318	152	58,470
3	3		47,504	1,554	49,058
4	4		45,021	2,387	47,408
5	5		43,657	2,942	46,599
6	6		31,090	40	31,130
7	7		30,723	1	30,724
8	13		22,362	8,014	30,376
9	8		29,332	150	29,482
10	9		28,833	283	29,116
11	670		82	28,682	28,764
12	10		25,368	1,304	26,672
13	12		22,465	3,157	25,622
14	11		22,619	1,790	24,409
15	20		18,364	6,019	24,383
16	32		14,856	9,145	24,001
17	14		21,595	2,368	23,963
18	767		52	22,727	22,779
19	18		19,234	2,449	21,683
20	15		21,516	43	21,559
21	16		21,138	74	21,212
22	17		20,079	795	20,874
23	40		13,967	5,328	19,295
24	19		18,903	0	18,903
25	24		17,250	1,162	18,412
26	21		18,098	29	18,127
27	22		17,610	343	17,953
28	23		17,485	73	17,558
29	25		16,892	651	17,543
30	28		15,607	1,674	17,281
31	26		16,880	41	16,921
32	27		16,066	744	16,810
33	130		6,120	10,671	16,791
34	30		14,954	1,534	16,488
35	39		14,140	2,022	16,162
36	34		14,719	1,143	15,862
37	110		6,840	8,952	15,792
38	54		11,252	4,483	15,735
39	29		15,195	163	15,358
40	-		0	15,339	15,339
41	31		14,939	377	15,316
42	44		13,053	1,978	15,031
43	33		14,770	0	14,770
44	35		14,633	0	14,633
45	36		14,595	4	14,599

46	37		14,240	336	14,576
47	41		13,881	277	14,158
48	38		14,156	0	14,156
49	43		13,258	557	13,815
50	42		13,406	0	13,406
51	45		12,758	43	12,801
52	48		12,270	334	12,604
53	47		12,368	19	12,387
54	46		12,370	11	12,381
55	49		12,207	28	12,235
56	51		11,876	345	12,221
57	50		11,953	68	12,021
58	52		11,740	146	11,886
59	-		0	11,697	11,697
60	53		11,674	0	11,674
61	1048		20	11,564	11,584
62	149		5,527	5,971	11,498
63	217		3,624	7,682	11,306
64	64		10,181	900	11,081
65	56		11,006	54	11,060
66	55		11,025	0	11,025
67	57		10,981	0	10,981
68	58		10,742	59	10,801
69	59		10,737	0	10,737
70	61		10,379	21	10,400
71	60		10,381	0	10,381
72	62		10,333	0	10,333
73	63		10,263	66	10,329
74	120		6,434	3,844	10,278
75	65		10,102	164	10,266
76	95		7,482	2,782	10,264
77	66		10,097	13	10,110
78	67		9,837	0	9,837
79	68		9,745	0	9,745
80	69		9,529	56	9,585
81	74		8,915	658	9,573
82	70		9,454	31	9,485
83	71		9,375	0	9,375
84	73		9,238	102	9,340
85	72		9,287	0	9,287
86	88		7,817	919	8,736
87	103		7,068	1,624	8,692
88	75		8,689	0	8,689
89	76		8,664	0	8,664
90	77		8,593	10	8,603
91	104		7,036	1,509	8,545
92	78		8,540	0	8,540
93	102		7,076	1,402	8,478
94	79		8,439	0	8,439
95	80		8,282	0	8,282
96	81		8,085	29	8,114
97	101		7,080	984	8,064
98	82		8,050	0	8,050
99	89		7,808	204	8,012
100	83		7,971	0	7,971

Source: MTW Research / ONS

Within the context of the overall market, a relatively small number of Housing Associations account for the majority of housing stock, with around 30% of the market accounting for 98% of stock.

3.1.2 Top 60 Housing Associations Groups – Members and Stock Owned

In addition to Housing Associations operating on an individual basis, there are a number of groups of Housing Associations, formed for a variety of purposes, which represent significant potential targets for building and home improvement product suppliers.

The following table shows the top 60 Groups of Private Registered Providers ranked by stock owned.

Figure 46: Groups of Private Registered Providers Ranked by Stock Owned 2011

Rank	Group or PRP name	PRP name <i>(group member PRPs which do not own stock are not shown in the list)</i>	Owned stock	
			PRP total	Group total
1	Group Name (Redacted)	Redacted	48,360 4,320 7,024 780 1,694	62,178
2			58,318	58,318
3			16,066 3,149 3,194 3,509 3,760 6,320 6,923 6,977 7,076	56,974
4			18,364 3,545 470 601 40 1,064 6,120 22,465 4,171	56,840
5			1,300 43,657 4,551	49,508
6			13 47,504	47,517
7			318 11,740 14,156 80 21,138	47,432

8			45,021	45,021
9			1,573 2,319 5,527 744 22,362	32,525
10			11,252 6,803 14,140	32,195
11			21,595 1,509 2,229 68 6,434	31,835
12			17,610 7,080 6,664	31,354
13			31,090	31,090
14			30,723	30,723
15			249 29,332	29,581
16			28,833	28,833
17			13,967 13,053 354 742	28,116
18			14,856 1,637 4,194 4,939	25,626
19			14 25,368 218	25,600
20			22,619 1,785	24,404
21			19,234 4,522	23,756
22			6,174 16,880	23,054
23			4 4 17,250 5,718	22,976
24			3,471 9,454 8,593	21,518
25			21,516	21,516
26			998 20,079	21,077
27			3,805 11,953 3,468 35	19,261
28			17,485 1,423	18,908
29			18,903	18,903
30			3,331 679 14,595	18,605

31			18,098	18,098
32			4 5,746 829 1,151 10,333	18,063
33			10,381 3,896 3,586	17,863
34			5,240 5,497 6,447	17,184
35			8,915 2,187 3,086 2,837	17,025
36			12,368 3,182 1,349	16,899
37			16,892	16,892
38			6,840 4,061 4,891 649	16,441
39			5,389 6,414 4,120 196	16,119
40			3,686 12,207	15,893
41			15,607 51	15,658
42			3,447 10,379 1,593	15,419
43			6,949 3,007 4,836 470	15,262
44			15,195	15,195
45			14,240 802	15,042
46			14,954	14,954
47			14,939	14,939
48			14,770	14,770
49			9,375 3,023 2,363	14,761
50			14,719	14,719
51			4,480 10,181	14,661
52			14,633	14,633
53			6,573 3,220 4,796	14,589
54			13,881 188	14,069
55			83 7,068	

			3,806	
			1,367	
			1,038	
			697	14,059
56			11,006	
			526	
			976	
			1,089	
			234	13,831
57			13,258	13,258
58			12,758	12,758
59			12,370	12,370
60			12,270	12,270

Source: MTW Research / ONS

Housing Associations groups represent a key target market for building product suppliers, with these groups active in a number of new build and refurbishment schemes, alongside a wide variety of other activities.

xxxxxxxxxx is the largest such group, which is currently responsible for in excess of 62,000 dwellings. Given the additional benefits of purchasing power and a number of additional economies of scale generated by Housing Associations joining groups, it is likely that consolidation of the Housing Associations market will continue in the medium to longer term. As such, the importance of these large groups will increasingly impact on the specification and purchasing decision-making processes for building material suppliers.

3.2 WELSH HOUSING ASSOCIATIONS MARKET 2006-2016

Welsh Housing Associations currently represent around 5% of the total social housing stock in the UK. The following table details the largest private registered providers of Social housing in Wales ranked by total stock owned or managed:-

Figure 47: Top 60 Welsh Housing Associations 2012

Rank	Private Registered Provider	Total Stock
1	Redacted	10173
2		9251
3		9209
4		9184
5		8972
6		8108
7		6316
8		6284
9		5778
10		5381
11		4699
12		4630
13		4412
14		4246
15		4041
16		3774
17		3744
18		3600
19		3098
20		2654
21		2642
22		2351
23		2302
24		2228
25		2179
26		1972
27		1856
28		1804
29		1604
30		1495
31		1329
32		1250
33		1168
34		1117
35		864
36		774
37		638
38		488
39		425
40		398
41		243
42		148
43		108
44		102
45		92
46		67
47		32
48		31

49		29
50		28
51		22
52		13
53		12
54		12
55		11
56		10
57		9
58		9
59		8
60		6
61		6

Source: MTW Research / Welsh Assembly

As illustrated, the Welsh Housing Associations market is relatively concentrated, with the top 10 landlords currently managing more than 70,000 dwellings, representing around 50% of the market in terms of dwellings.

3.3 SCOTTISH HOUSING ASSOCIATIONS MARKET 2006-2016

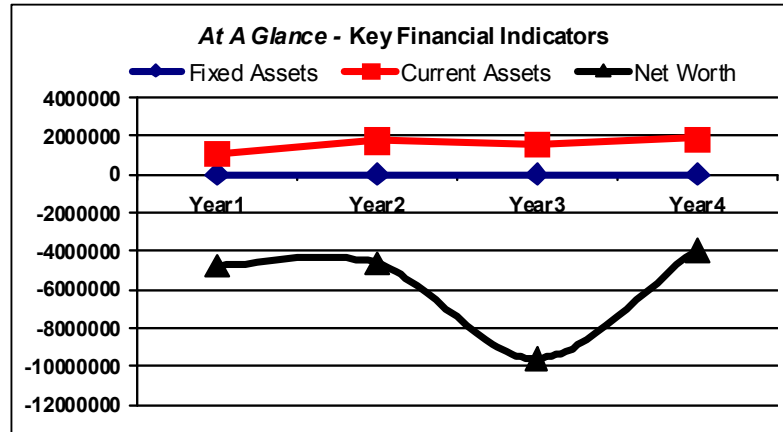
Scottish Housing Associations currently represent around 12% of the total social housing stock in the UK. The following table details the largest private registered providers of social housing in Scotland ranked by total stock owned or managed:-

3. KEY PROFILES & FINANCIALS OF LTD HOUSING ASSOCIATIONS

The following section identifies some of the largest limited UK Housing Associations and provides a 1 page profile with key performance indicators for each. It should be noted that there are other types of housing associations such as charities, industrial and provident societies and others who do not report financial information and are therefore excluded from the following section.

Sample Ltd - Company Overview & 'At a Glance'

Sample Address
Sample
Sample
Sample Postcode
Tel: Sample



Sample Ltd is a private limited by guarantee without share capital company, incorporated on September 16, 2004. The company's main activities are recorded by Companies House as "Property management and maintenance." In 2012, the company has an estimated 219 employees.

To year end December 2011, Sample Ltd is estimated to have achieved a turnover of around £14.3 million. Pre-tax profit for the same period is estimated at around £1.54 million.

The following table briefly provides a top line overview on Sample Ltd:-

Company Name	Sample Ltd
Brief Description of Activities	Property management and maintenance.
Parent Company	-
Ultimate Holding Company	-
Estimated Number of Employees	219
Senior Decision Maker / Director	Denise, Sample

The following table illustrates the company's key performance indicators for the last 4 years:-

Sample Ltd - 4 Year KPIs to Year End 31-Mar-11

Key Indicator £	Year End 31-Mar-08 (Year1)	Year End 31-Mar-09 (Year2)	Year End 31-Mar-10 (Year3)	Year End 31-Mar-11 (Year4)
Fixed Assets	0	0	0	0
Current Assets	£1,107,000	£1,796,000	£1,568,000	£1,852,000
Current Liabilities	£1,258,000	£1,803,000	£1,280,000	£1,464,000
Long Term Liabilities	£4,622,000	£4,626,000	£9,865,000	£4,357,000
Net Worth	£-4,773,000	£-4,633,000	£-9,577,000	£-3,969,000
Working Capital	£-151,000	£-7,000	£288,000	£388,000

4. ARMS LENGTH MANAGEMENT ORGANISATIONS MARKET

5.1 ALMOs MARKET 2012

Arms Length Management Organisations were introduced in 2001 and are private, not for profit companies established by local authorities as an alternative to stock transfer to Housing Associations. Whilst stock remains the property of the Local Authority, day to day management of the properties is transferred to ALMOs who are better placed to manage dwelling stock.

Responsible for managing over xx% of social housing stock in the UK, the primary focus of ALMOs has been the need to ensure

The following table details ALMOs active in 2012 and their respective stock of dwellings:-

Figure 138: Top 50 ALMOs Ranked by Stock of Dwellings 2012

ALMO	Number of units
Redacted	43,659
	35,729
	31,000
	30,850
	30,019
	29,379
	28,946
	23,912
	23,210
	Redacted

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Source: MTW Research / almos.org.uk

As the above table illustrates there are 57 ALMOs in 56 local authorities managing a total of £843,815 dwellings in 2012. xxxxxx Homes have the largest stock of dwellings with over 43,000 homes.

5.2 TYPICAL CHARACTERISTICS, TRENDS & SUPPORT FOR ALMOS

ALMOs are typically managed by a board of directors, which include a mix of the following:-

- Tenants
- Local Authority nominees
- Local business people
- Community representative
- Independent member with specific skill-set, including:-
 - Finance
 - Housing
 - Regeneration
 - Social cohesion etc.

Tenant board members are typically elected by fellow tenants to ensure they are representative of the tenants of the ALMO.

5.2.1 ALMO Budget Allocations 2011-2015 £M

Local Authorities fund ALMOs to manage, repair, improve and maintain their dwelling stock. The 2010 Spending Review has made £1.6bn available to Local Authority landlords to help tackle the backlog of homes that are not meeting the Decent Homes Standard. The following table shows the Decent Homes Backlog Programme Allocations from 2011-2015.

Figure 139: Decent Homes Backlog Programme Allocations £M 2011-15

	2011/12 £M	2012/13 £M	2013/14 £M	2014/15 £M	TOTAL £M
Redacted ALMO Name	7,000,000	11,500,000	30,000,000	52,000,000	100,500,000
	14,000,000	11,500,000	24,000,000	45,000,000	94,500,000
	12,500,000	11,000,000	25,000,000	46,000,000	94,500,000
	23,007,000	17,550,000	24,770,000	20,801,000	86,128,000
	0	11,250,000	15,000,000	50,693,599	76,943,599
	19,200,000	17,000,000	21,000,000	14,000,000	71,200,000
	19,000,000	17,000,000	6,451,470	27,480,000	69,931,470
	18,600,000	13,000,000	12,000,000	26,286,219	69,886,219
	13,448,617	16,214,995	19,664,003	17,621,002	66,948,617
	23,143,000	20,700,000	11,962,000	10,756,000	66,561,000
	9,166,667	15,000,000	15,000,000	23,581,000	62,747,667
	10,000,000	12,000,000	14,000,000	26,420,000	62,420,000
	17,833,333	16,250,000	16,000,000	11,500,000	61,583,333
	14,000,000	18,000,000	12,000,000	14,606,091	58,606,091
	10,000,000	7,500,000	10,000,000	27,500,000	55,000,000
	8,500,000	7,500,000	19,781,000	16,281,000	52,062,000
	13,500,000	9,000,000	12,000,000	17,355,000	51,855,000
	0	4,540,000	14,760,000	30,000,000	49,300,000
	16,900,000	13,000,000	7,400,000	9,600,000	46,900,000
	2,000,000	9,500,000	15,000,000	15,500,000	42,000,000
	3,100,000	500,000	5,000,000	20,645,000	29,245,000
	5,610,525	6,250,000	6,000,000	7,000,000	24,860,525
	5,929,308	4,750,000	4,348,159	9,557,585	24,585,052
	0	3,690,000	8,500,000	8,560,000	20,750,000
	7,150,000	5,000,000	4,000,000	4,500,000	20,650,000
	6,000,000	5,000,000	7,659,150	0	18,659,150
	5,000,000	7,000,000	0	0	12,000,000
	4,795,000	3,500,000	3,500,000	0	11,795,000
	0	2,000,000	4,389,380	5,199,310	11,588,690
	2,620,000	2,620,000	2,620,000	3,140,000	11,000,000
	3,946,000	6,500,000	0	0	10,446,000
	0	0	3,000,000	5,500,000	8,500,000
	0	2,317,633	3,238,225	2,904,390	8,460,248
	0	0	2,270,000	5,935,000	8,205,000
	0	0	2,246,500	4,145,160	6,391,660
	0	0	0	5,900,000	5,900,000
	0	0	2,990,113	2,127,644	5,117,757
	1,250,550	2,667,372	0	0	3,917,922
	1,200,000	1,200,000	0	705,000	3,105,000
	0	0	0	2,500,000	2,500,000
	0	0	1,000,000	1,200,000	2,200,000
	0	0	1,855,000	0	1,855,000
	1,600,000	0	0	0	1,600,000
	0	0	200,000	1,200,000	1,400,000
	0	0	395,000	0	395,000
	0	0	0	300,000	300,000
Total	300,000,000	312,000,000	389,000,000	594,000,000	1,595,000,000

Source: MTW Research / HCA

As illustrated in the chart above, £1.6 billion has been made available through the Decent Homes Backlog Allocations between 2011 and 2015. A total of 46 Local Authority and ALMO landlords will receive backlog funding over the next four years to make around 127,000 homes decent. The Local Authority with highest total allocation is

5. PROCUREMENT BY HOUSING ASSOCIATIONS & ALMOS

6.1 KEY FACTORS INFLUENCING SPECIFICATION OF PRODUCTS & SERVICES

There are a number of over-riding factors that directly impact the specification of products and services to be used by Housing Associations and ALMOs, driven primarily by government and EU policy. These include:-

Adherence to Best Value practices whereby price must be one of the evaluation criteria when acquiring good and services. Other evaluation criteria may include, but are not limited to environmental considerations, quality, and vendor performance.

Delivery of