**HOUSING MARKET CASE STUDY**

# Supporting Evidence Research Pack

*Housing supply • ministerial continuity • policy change*

**August 2026**

Prepared to support the master Housing Market Case Study and its Human Agency analysis.

## “Change is inevitable. Progress is not.”

The evidence below asks what changed, what persisted, and what the system appears to have learned.

Formulated by Michael Griffin - Founder of Arbitrium

# Executive finding

**The independent evidence broadly supports the structural pattern identified in the case study, while also correcting and refining parts of the remembered story.**

- Housebuilding: the England benchmark series shows that the large reduction in local-authority/public-sector housebuilding from the early 1970s was not replaced at equivalent scale by either housing associations or private-sector building. Total England new-build completions in the selected benchmark series fell from about 292,000 in 1970/71 to about 152,000 in 2024/25. UK totals are higher because they also include Scotland, Wales and Northern Ireland; the two geographies should not be compared as though they are the same series.
- Ministerial continuity: from May 2010 to July 2024 there were 16 appointments to the principal housing-minister role (15 individuals, because Lee Rowley served twice). On the dates used here, the average completed tenure was about 10.6 months and the median about 8.4 months.
- Policy response: successive governments repeatedly changed planning, demand support, social-housing finance, targets and delivery mechanisms. Some reforms were substantial. Most operated on one or more components of the existing housing system rather than creating a replacement market at the scale of the earlier local-authority building programme.
- Important correction: the public record shows Caroline Flint was Housing Minister from 24 January to 3 October 2008. Because Genesis arose after the 2008 crash and was sent to the Bank of England in 2009, the later ministerial meeting recalled in Section 2 cannot have been with Caroline Flint if it followed Genesis. The minister's identity should therefore remain "unverified" until another record or recollection resolves it.

**The strongest defensible conclusion is not that one policy decision "caused" the housing crisis. It is that England lost a very large source of new-build supply and, over the following decades, did not recreate an equivalent additional source. Across the wider UK, output is naturally higher because Scotland, Wales and Northern Ireland are included, but the same analytical discipline applies: geography and measure must be stated clearly before comparisons are made. The system changed repeatedly; the long-run output problem remained.**

# A. Fifty years of housing supply

The official MHCLG historical series runs back to 1946 and is an England series. For this evidence pack, Figure A1 uses selected England financial-year benchmarks published in the 2026 UK Housing Review, which compiles that official series. These benchmarks are sufficient to test the central structural proposition without pretending that seven points tell the whole history.

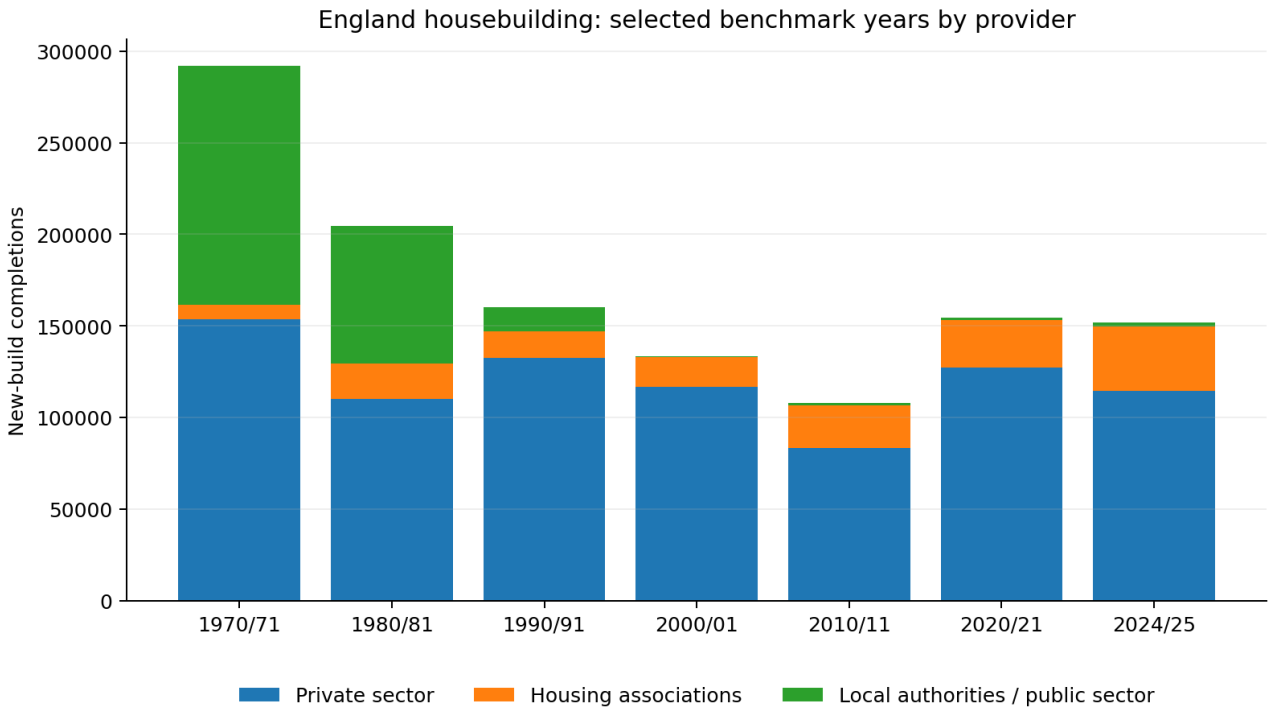


*Figure A1. Selected ENGLAND new-build completions by provider. Source: UK Housing Review 2026, Table 19b; underlying official series: MHCLG Live Table 244. Figures are completions and exclude conversions/other additions.*

| Year | Public / local authority | Housing associations | Private sector | Total |
|---|---|---|---|---|
| **1970/71** | 130,180 | 8,180 | 153,440 | 291,790 |
| **1980/81** | 74,840 | 19,300 | 110,230 | 204,370 |
| **1990/91** | 12,960 | 14,580 | 132,500 | 160,030 |
| **2000/01** | 180 | 16,430 | 116,640 | 133,260 |
| **2010/11** | 1,140 | 23,550 | 83,180 | 107,870 |
| **2020/21** | 1,610 | 25,860 | 127,200 | 154,660 |
| **2024/25** | 2,260 | 35,370 | 114,420 | 152,040 |

## What the benchmark data say

- Between 1970/71 and 2024/25, the public-sector/local-authority contribution in these ENGLAND benchmark figures fell by roughly 128,000 completions a year.
- Housing-association completions grew substantially, from about 8,000 to 35,000, but that increase was much smaller than the lost public-sector volume.
- Private-sector completions did not rise to fill the gap. In these selected years they were 153,440 in 1970/71 and 114,420 in 2024/25, with large cyclical variation between.

- The result is a materially lower ENGLAND total: roughly 292,000 completions in 1970/71 versus 152,000 in 2024/25 in this benchmark series.

**Refinement to the case-study wording: the England evidence supports "a major source of supply was lost and not replaced at equivalent scale." Michael's long-standing recollection that private-sector output was often around 200,000 homes a year was based on wider UK/GB industry figures, whereas Figure A1 is England only. The apparent contradiction arose from mixing geographies, not necessarily from the underlying recollection being wrong.**

## England and UK - an important distinction

Housing is devolved. ONS therefore publishes a separate UK housebuilding series combining England, Scotland, Wales and Northern Ireland. For the financial year ending March 2023, ONS recorded 210,320 new-build completions across the UK: 174,600 in England, 23,510 in Scotland, 5,790 in Wales and 6,420 in Northern Ireland. This illustrates why UK totals can sit close to or above 200,000 even when the England-only series is materially lower.

The distinction matters throughout this case study. English Housing Ministers, MHCLG policy and the current 1.5 million-home ambition relate to England. UK or Great Britain industry figures answer a different question and must be labelled as such.

Independent market evidence strengthens the structural point. In its 2024 housebuilding market study, the Competition and Markets Authority found that, since the Second World War, private developer output in England and Wales had fluctuated at roughly 150,000 to 200,000 homes a year and was highly cyclical. It also found that the only periods when housebuilding in England and Wales approached or exceeded 300,000 homes a year were periods with significant local-authority housebuilding. The CMA concluded that private housebuilding alone had rarely, if ever, delivered close to the level expected under current targets.

This does not prove that the answer is to recreate the old council-housebuilding model. It does strengthen the question at the centre of the housing case: where is the additional capacity needed to reach today's ambitions expected to come from?

# B. Housing ministers and continuity

The ministerial record makes the continuity issue unusually visible. Housing is a long-cycle activity, yet the principal ministerial role has frequently changed after only months. The chart below measures approximate tenure in the housing role; the final Matthew Pennycook bar is shown only to the end of 2025 for comparability with the case-study period.

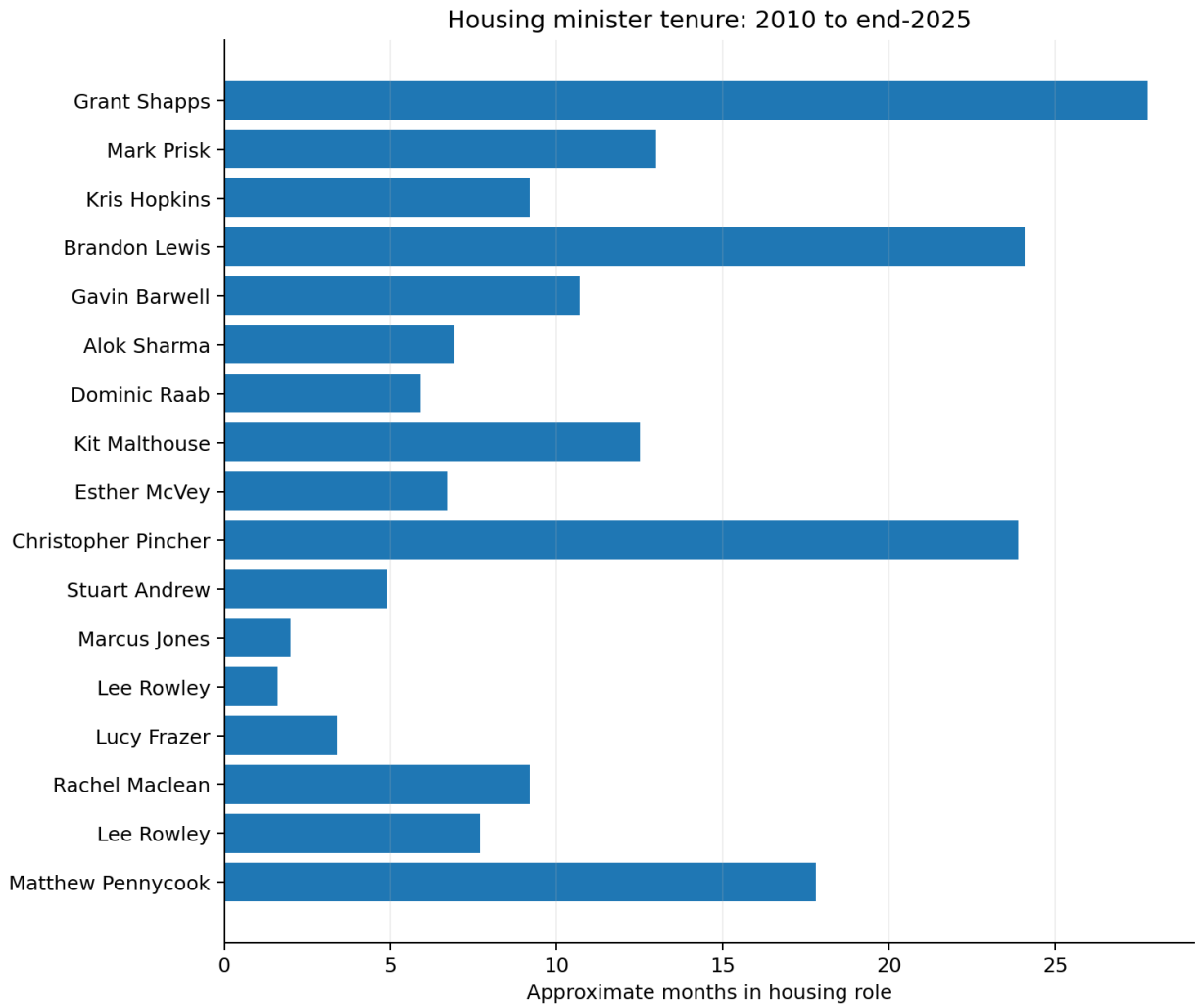


*Figure B1. Approximate tenure in the principal housing-minister role. Dates compiled from GOV.UK minister biographies/role histories and departmental records. *Matthew Pennycook remained in post beyond end-2025.*

| Minister | From | To | Approx. months |
|---|---|---|---|
| **Grant Shapps** | May 2010 | Sep 2012 | 27.8 |
| **Mark Prisk** | Sep 2012 | Oct 2013 | 13.0 |
| **Kris Hopkins** | Oct 2013 | Jul 2014 | 9.2 |
| **Brandon Lewis** | Jul 2014 | Jul 2016 | 24.1 |

| | | | |
|---|---|---|---|
| **Gavin Barwell** | Jul 2016 | Jun 2017 | 10.7 |
| **Alok Sharma** | Jun 2017 | Jan 2018 | 6.9 |
| **Dominic Raab** | Jan 2018 | Jul 2018 | 5.9 |
| **Kit Malthouse** | Jul 2018 | Jul 2019 | 12.5 |
| **Esther McVey** | Jul 2019 | Feb 2020 | 6.7 |
| **Christopher Pincher** | Feb 2020 | Feb 2022 | 23.9 |
| **Stuart Andrew** | Feb 2022 | Jul 2022 | 4.9 |
| **Marcus Jones** | Jul 2022 | Sep 2022 | 2.0 |
| **Lee Rowley** | Sep 2022 | Oct 2022 | 1.6 |
| **Lucy Frazer** | Oct 2022 | Feb 2023 | 3.4 |
| **Rachel Maclean** | Feb 2023 | Nov 2023 | 9.2 |
| **Lee Rowley** | Nov 2023 | Jul 2024 | 7.7 |
| **Matthew Pennycook** | Jul 2024 | Dec 2025* | 17.8 |

## The 2017–2018 sequence in the case study

| Date | Event |
|---|---|
| **13 June 2017** | Alok Sharma becomes Housing and Planning Minister. |
| **17 November 2017** | Sajid Javid writes to Sarah Newton confirming he has read NPFM and offers a route to officials (case-study documentary evidence). |
| **9 January 2018** | Dominic Raab replaces Alok Sharma as Housing Minister. |
| **18 January 2018** | Michael meets the civil-service team at Marsham Street to discuss NPFM (case-study chronology). |
| **18 April 2018** | Michael delivers RTPI Land Viability training in London; one of the officials attends. The private conversation about NPFM stopping is personal recollection. |
| **9 July 2018** | Dominic Raab leaves the housing role; Kit Malthouse succeeds him. |

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|---|---|
| **2018 correspondence** | Government correspondence confirms officials had been reviewing NPFM against the legal and policy framework and later identifies primary/secondary legislation and parliamentary time as barriers (case-study documentary evidence). |

**Human Agency observation:** the evidence does not prove that ministerial turnover caused NPFM to stop. It does establish that the housing brief changed hands frequently, including immediately before and after the key 2018 period. That makes continuity a legitimate structural question rather than a retrospective complaint.

### Verification note — early ministerial meeting

The master narrative currently records a recollection that the early meeting may have involved Caroline Flint. Parliament records Caroline Flint as Housing Minister from 24 January to 3 October 2008. Margaret Beckett followed in 2008–09 and John Healey was Housing Minister from June 2009 to May 2010. Because Genesis was developed and submitted in 2009, Caroline Flint cannot have been the minister in a later post-Genesis meeting. The safest wording is therefore “a Housing Minister, identity not yet verified.”

# C. Policy change versus the underlying outcome

The table below is not a complete history of housing policy. It selects major interventions that illustrate the types of response repeatedly used. The final column is analytical: it asks what part of the system the intervention primarily changed.

| Period | Intervention | What changed | Primary lever |
|---|---|---|---|
| **1970s onward** | Decline in direct local-authority housebuilding | A large public-sector source of new-build supply contracts over time. This is an observed structural shift rather than one single policy event. | Supply structure |
| **1980** | Right to Buy | Secure council tenants gain a statutory route to buy at a discount. Major tenure/home-ownership reform; it changes ownership of existing stock more directly than the production system for replacement new supply. | Tenure / demand / existing stock |
| **1988** | Housing Act mixed-funding regime | Housing associations are enabled to combine public grant with private finance; government deliberately seeks to leverage private finance into social housing development. | Provider / finance structure |
| **2012** | National Planning Policy Framework | Planning policy is consolidated and reoriented around sustainable development, plan-making and housing supply. | Planning |
| **2013** | Help to Buy: Equity Loan | Government equity loans support purchasers of new-build homes, initially from April 2013. The scheme acts through purchasing capacity and new-build demand. | Demand / finance |

| | | | |
|---|---|---|---|
| **2017** | "Fixing our broken housing market" White Paper | Government proposes planning for the right homes, building faster, diversifying the market and helping people now. | Planning / delivery / diversification / demand |
| **2018** | HRA borrowing cap abolished | Councils are again permitted to borrow against expected rental income for housebuilding; government estimated potential for around 10,000 additional homes a year. | Local-authority supply capacity |
| **2024** | Planning overhaul and 1.5 million-home ambition | Mandatory local targets restored/raised, grey-belt policy introduced, planning capacity funded and a five-year 1.5 million-home ambition set. | Planning / targets / delivery capacity |

### What this policy map suggests

- The policy history is not "nothing was done". A great deal changed, and several reforms were substantial.
- The responses repeatedly concentrated on particular levers: planning, access to mortgage finance, tenure, housing-association finance, targets, infrastructure and the ability of existing providers to build.
- The 1988 mixed-funding regime and the 2018 removal of the HRA borrowing cap are genuine structural supply interventions and should be acknowledged as such.
- What is much harder to identify is an intervention that recreated, at comparable scale, the second major source of output visible in the early-1970s England figures. Housing associations grew, and councils later regained some borrowing freedom, but the combined non-private contribution remained far below the earlier public-sector volume in the benchmark data. The CMA's longer-run evidence points in the same direction: very high overall output historically coincided with substantial local-authority building alongside private development.

**This is where HIPP can be located fairly: not as proof that government had "missed the answer", but as one attempt to ask a different structural question. If the existing market has not historically demonstrated the capacity to deliver the required volume alone, is the appropriate response simply to demand more from that market - or should we also examine how additional housing-market capacity might be created? HIPP explored that additional-market question through a different relationship between the building, the land and their ownership. The detailed mechanism sits outside this evidence review and remains in the original HIPP material.**

## D. The Human Agency reading

Placed side by side, the three strands create a pattern worth examining rather than a verdict to be imposed.

| | |
|---|---|
| Change | Ministers, policies, targets, funding mechanisms and planning rules changed repeatedly. |
| Experience | The system accumulated decades of data, reviews, programmes and professional knowledge. |
| Continuity | The individuals holding the housing brief frequently changed on a much shorter cycle than housing delivery. |
| Structure | Responsibility remained distributed across government, planning, finance, local authorities, housing associations and private developers. |
| Outcome | Total new-build output in the selected benchmark years remained materially below the early-1970s level. |
| Choice | The central HA question becomes: what did people and institutions choose to preserve, question or change in response to what experience was showing them? |

## Fifty years of experience. Repeated leadership change. Repeated policy change. A persistent problem.

## What did we choose to learn?

### A cautious conclusion

This second research pass supports the case study's central Human Agency proposition more strongly than it supports any single housing-policy verdict. The historical England supply evidence makes the "missing source of supply" argument credible, while the separate UK series explains why wider industry totals may be nearer 200,000. The ministerial record makes continuity a genuine structural issue. The policy record shows repeated activity and adaptation, but also repeated reliance on familiar system levers.

It does not prove that HIPP would have worked, that ministerial turnover caused the housing crisis, or that planning and finance reforms were misguided. It gives us something more useful: a grounded basis for asking why extensive change and accumulated experience have not yet translated into the level of progress society continues to seek.

**Change is inevitable. Progress is not. Progress depends on the choices through which change is understood and acted upon.**

# Sources and verification trail


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20. GOV.UK, MHCLG annual report 2024–25 — Lee Rowley end date — https://www.gov.uk/government/publications/mhclg-annual-report-and-accounts-2024-to-2025
21. GOV.UK, Matthew Pennycook — appointed Housing and Planning Minister 6 July 2024 — https://www.gov.uk/government/people/matthew-pennycook

# Further Supporting Material

Additional original material relating to the development of the proposals and the eighteen-year journey described in the Housing Market Case Study has been retained.

**Evidence A** — Housing Crisis / Human Agency - Case Study Chronology

**Evidence B** — Correspondence

**Evidence D** — Original Proposals, Genesis, NPFM, HIPP

The material includes original correspondence, contemporary documents and earlier proposal material that provide further evidence of the journey described in the Case Study.

This supporting material is available for those wishing to examine the case in greater depth. Please contact Michael A Griffin at michael@arbitrium.uk or through the contact page at arbitrium.uk.