



The Future of Social Homes for Rent



Contents

Executive Summary	04
The Challenge: Too few homes for social rent are being built	08
The Causes of the Problem: A broken model	12
Resolution: Revisiting the past	16
Embracing Cutting Edge Technology	20
Case Study: A new approach to modular housing	24
Conclusion	26
About Scape Group	27

Executive Summary

The demand for social housing available to rent in England is reaching breaking point. Local authorities – which are responsible for delivering local housing needs – are becoming increasingly concerned, as is the public.

Mark Robinson
Scape Group Chief Executive



While hedge funds are investing in social housing to rent, they are not doing so at scale. Furthermore, the bulk of regulator money now goes to housing associations (more recently classified as Registered Providers or RPs), rather than local authorities. The housing association model has proven itself highly effective for the management of estates, however it is not building homes for social rent at the scale the country needs.

There are approximately 1,700 housing associations in England. In 2017/18, registered providers based in England, representing 89% of the UK housing association stock completed just 4,500 homes for social rent.¹ This is not simply the result of short-term factors like Brexit, the Rent Reduction Policy, or Right to Buy. This is a long-term problem with the rate of construction that needs to be addressed.

1,700

housing associations
in England

4,500

homes for social rent
were completed in
2017/18

We cannot rely on investment in these types of properties from hedge funds or housing associations. We cannot tinker around the edges. Delivering a step change in providing homes for our communities demands a radical solution.

That answer lies in the past. Councils must be empowered to build social housing themselves – as they were in the 1970s before housing associations started to occupy a key role as non-governmental delivery agents for the provision of social rented housing.² In 1977, when new social housing remained the responsibility of councils 121,000 homes were built.

To return to these halcyon days of social rented housing construction, local authorities must find a way to persuade Government they are best-positioned to address the challenge and that they have a credible plan to achieve results. Local authorities will need to demonstrate they have a plan to circumvent problems, such as the skills shortage in the construction industry, that could hold back a huge increase in the construction of social rented homes.

“ In 1977, when new social housing remained the responsibility of councils 121,000 homes were built. ”

The Prime Minister's recent announcement that the Government will lift the Housing Revenue Account cap means local councils can now borrow against their assets to fund new developments.

On the one hand, this is a huge turning point in the delivery of new affordable housing. Finance has always acted as a key barrier to local councils' ability to make a difference to housing output. With the correct resources and powers, they can serve as engines for housebuilding in communities across the whole of the UK. On the other hand, this will create tens of thousands of new homes, whereas the UK needs hundreds of thousands, and this is unlikely to be channelled towards sufficient homes for social rent. Furthermore, to meet housing demand we need a revolution in housebuilding and this means thinking more innovatively about the method and speed in which we are able to deliver high-quality new homes.



The use of modular building specialists must sit at the heart of this toolkit. Modern Methods of Construction (MMC) can deliver quality affordable housing rapidly and deliver more-for-less by building up to four times as many homes with the same onsite labour.³

While the combination of a return to mass council house building and cutting-edge ways of building is a radical solution to the social housing problem, it would require a revolution in the delivery of social rented housing.

In the absence of that, councils, ALMOs (arm's-length management organisations), council house building companies, and registered providers looking to accelerate their own building programmes (for social rent or otherwise) should also consider MMC, ensuring efficient programme delivery through the use of a reputable and well-established framework provider.

¹How many homes did housing associations deliver in 2017/18?, NHF, Jenny Charlton, 27th June 2018

²Changes In The Economy, Vicky Pryce 2011-2020, October 2012

³Using modern methods of construction, National Audit Office, November 2005

“To meet housing demand we need a revolution in housebuilding and this means thinking more innovatively about the method and speed in which we are able to deliver high-quality new homes”



The Challenge: Too few homes for social rent are being built

England needs more social rented housing. Councils – who are responsible for delivering local housing needs are concerned.

In a survey of 50 local authorities, 65% of those polled informed us they were “very concerned” about the provision of social rented housing in their area. In southern England (including London), the rate of councils being “very concerned” rose to 75%.

This apprehension is well founded; the latest official figures from the Local Authority Housing Register for England show that the average local authority has **over 3,500 families on its council housing waiting list. In England alone, 1.25m families remained on the waiting list for social housing between 2016-17.⁴ Almost two-thirds (65%) of families had been waiting for a home for more than a year.⁵** Over 60 councils have more than 5,000 households on their lists, and the local authorities with the longest housing waiting lists have over 25,000 families registered. Our research shows that even in the best performing area of the country, centred around the Midlands and East Anglia, the average council had 1,019 families on their current housing waiting list.

While the new orthodoxy is that social housing should be viewed a temporary safety net for households to call upon only in times of acute need, there is also a countervailing strand of thinking: that social housing holds a role in supporting people who are actively contributing to the economy through low-paid work.⁶ Even if we accept a more limited role for social rent in the nation’s property stock, the current system is a far cry from meeting the demand that councils are facing.

“Almost two-thirds (65%) of families had been waiting for a home for more than a year.”

3,500

Average local authority has over 3,500 families on its council housing waiting list

1.25m

Families remained on the waiting list for social housing between 2016-17

Set against a huge wave of demand is a tiny pool of available council housing. **In the research conducted councils throughout England commented that they had an average of only 56 homes available.**

The general public is as concerned as councils. When we surveyed 1,000 British adults, **64% of respondents said they thought that we had reached a crisis point in the provision of homes available for social rent in England.**

The Ministry of Housing, Communities & Local Government has said that Government will be “breathing down the necks” of local authorities who fail to meet their housing targets under the revised National Planning Policy Framework (NPPF). The Government is now enforcing new rules which will remove the right for councils to decide what is built in their area if they are unable to meet their targets. Instead an appointed inspector will make the decision on their behalf to ensure housing is being delivered on time.⁷ Rather unfairly, local authorities are being positioned as the scapegoat.

It is clear that councils want to do more to ease the housing crisis. **Three in every five (60%) of councillors with lead responsibility for housing in their local authority said that social housing is their main investment priority.**⁸

The realistic aspirations to build over the next ten years are relatively modest. In 2013, when the Smith Institute asked councillors how many new council homes were expected to be built by their council over the next decade, **some 19% replied between 1-100 units; 43% between 101 and 500 units; 24% between 501 and 1,000 units; and nearly 10% said over 1,000 units.**⁹

64%

of the general public said they thought that we had reached a crisis point in the provision of homes available for social rent in England.

60%

of councillors with lead responsibility for housing in their local authority said that social housing is their main investment priority.

In our survey, we asked local authorities how many homes for social rent they would like to be building. **The average response indicated a desire to build 1,800 council houses, with those in southern England aspiring to build 2,200.** Councils would like to build many times more council houses than they forecast actually developing: council's realistic aspirations to build over the next ten years are relatively modest, as most councillors expect to build up to 1,000 homes over the next decade.¹⁰ This research revealed local authorities would like to build 18 times more homes for social rent than they expect to build.

Not only is the desire apparent, local authorities are making huge efforts to help resolve the wider housing crisis. Lord Porter, Chairman of the Local Government Association (LGA), has stated that nine out of ten planning applications are approved by councils and that 321,000 new homes were approved by local authorities in 2016/17. With the Accelerated Construction programme, the Government wants to provide a package of support to ambitious local authorities who would like to develop surplus land holdings at pace. **While this is admirable, 100% of the councils who took part in the research across England commented that they were already involved with the scheme.**

This shows councils are doing everything in their power to deliver new homes for those that need them most, but the limited powers they have are not delivering the results at the rate the country needs to meet demand.

⁴ More than 1m families waiting for social housing in England, The Guardian, 9th June 2018

⁵ Ibid

⁶ Consumers, choice and competition, Professor Alex Marsh, October 2012

⁷ Councils warned to meet homes targets or lose planning powers, BBC, 4th March 2018

⁸ Does council housing have a future?, The Smith Institute, November 2013

⁹ Ibid

¹⁰ Ibid

The Causes of the Problem:

A broken model

Currently, the bulk of Government money is allocated to housing associations rather than local authorities. Housing associations have been an important contributor to the provision of homes since the Victorian era but have become more important in the last forty years.

As local councils reduced their housebuilding activity from the 1980s (and many local authorities transferred ownership of their housing stock to housing associations to manage properties on their behalf or the incumbent tenants), all affordable housing in many areas is now delivered by housing associations.

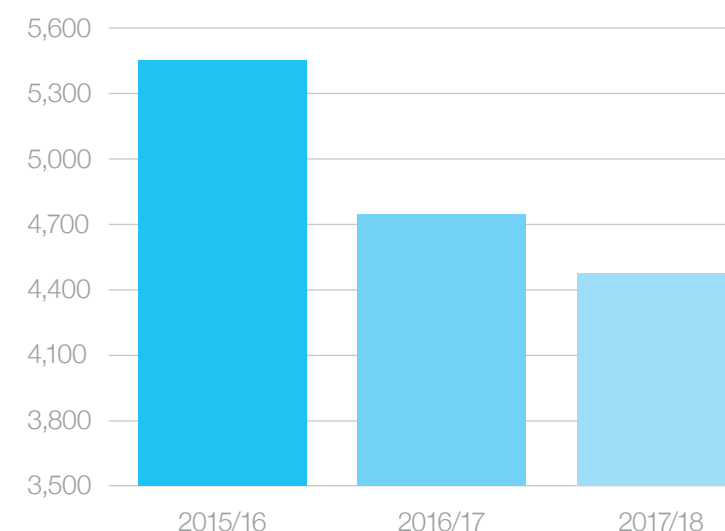
Housing associations have long occupied a key role as non-government delivery agents for the provision of affordable housing. The principle economic factors that directly affect housing organisations are: GDP, interest rates, inflation, buoyancy of the stock market, availability of corporate funding, availability of mortgages, investment in housing by Government and housing benefit, and taxation.¹¹

While the housing association model has proven itself highly effective for the management of estates, it has not delivered the scale of social rented housing that the country requires.

3

**social rented houses
are completed on
average each year per
housing association**

National Housing Federation – Social Rent Completions



**“This represents
an overall drop
of 19%”**

In recent years, England has benefited from historically low interest rates¹² (which affect the interest payments on borrowing and the cost of new borrowing to finance new homes), healthy RPI inflation, a buoyant stock market (lowering pension deficits), and excellent mortgage availability – helping sales programmes, helping to improve HA’s finances.

In 2017/18, registered providers in England representing **89% of the housing association stock completed approximately 4,500 homes for social rent**¹³ (both inside and outside the Affordable Homes Programme).

This represents a drop of 6% on 2016/2017 when 4,775 social rented homes were built, which, in turn represented a decrease of 13% on 2015/2016 when 5,464 social rented homes were completed.

Additionally, social rented properties now represent a smaller proportion of the number of homes completed by housing associations.

In 2015/16, 14% of completed homes were for social rent, which fell to 13% in 2016/17, and to just 11% in 2017/18.¹⁵

Given that there are approximately 1,700 housing associations in England, that means they are now completing, on average, just three social rented houses each a year. Of course, the vast majority of housing associations are small organisations which manage property and they do not build new homes on a large scale¹⁴, however the figure highlights how little social rented housing is actually being built or prioritised.

¹¹ Housing 2020, Orbit, Edited by Simon Graham, October 2012

¹² The current Bank of England base rate is 0.75% and has been since 2 August 2018. This is the highest it has been in nine years. Before August 2018, it had stood at 0.5% since November 2017. Between August 2016 and November 2017, the base rate was at a historic low of 0.25%. Prior to that, it spent seven years at 0.5%.

¹³ How many homes did housing associations deliver in 2017/18?, NHF, Jenny Charlton, 27th June 2018

¹⁴ Housing associations play a vital role in building new homes, CIH, Terrie Alafat, 24th July 2015

¹⁵ How many homes did housing associations deliver in 2017/18?, NHF, Jenny Charlton, 27th June 2018

¹⁶ The Budget 2018, HM Treasury, 30th October 2018

¹⁷ Theresa May lifts borrowing cap on local councils to help ‘solve housing crisis’, The Independent, Rob Merrick, 3rd October 2018

¹⁸ Savills responds to HRA debt cap abolition announcement, 4th October 2018

¹⁹ Safe as Houses, The Sun, Hugo Gye, 3rd October 2018

²⁰ Hedge fund moves into Luton council houses, Sunday Times, Angela Jameson, 6th March 2016

²¹ Opportunities for Institutional Investment in Affordable Housing, The Cambridge Centre for Housing & Planning Research, 11th March, 2011

²² Housing 2020, Orbit, Edited by Simon Graham, October 2012

This is not simply the result of recent events such as Brexit (the referendum only took place on 23 June 2016) or the Rent Reduction Policy (which was only announced in the July 2015 budget). This is a long-term problem.

The role of housing associations in society stretch above and beyond that of a private sector housebuilder. Their work can include regenerating communities, supporting tenants with mental health problems or those affected by domestic violence, helping residents to secure new qualifications and find employment. Yet housing associations are struggling to deliver that fundamental human requirement – safe and affordable housing – with Government grants.

Typically, housing associations value the delivery of a new house at £150,000. In comparison the Home Builders Federation, which represents private housebuilders, quotes an average of £90,000 for a three-bedroom house with land included which represents a 40% reduction in delivery costs for the private sector. Increased upfront investment, to deliver high quality housing, makes sound business sense for housing associations as they have a vested interest in an asset they will own for the next 50 to 100 years. But there is a balance to be struck to ensure the homes people need are being delivered at the required rate.

The solution is to look for options that can deliver quality new homes more efficiently and cost-effectively, providing the dual benefit of delivering much needed social rent housing and the funding-stream for providing the value-added services.

The recent announcement from the Prime Minister that the Government will lift the Housing Revenue Account cap means local councils can now borrow against their assets to fund new developments¹⁶. On the one hand, this is a huge turning point in the delivery of new affordable housing. Finance has always acted as a key barrier to local councils' ability to make a difference to housing output. With the right resources and powers, they can serve as high powered engines for housebuilding in communities across the whole of the UK.

£850m

One of Europe's biggest hedge funds is investing £850m in social housing over three years.

40%

A typical three-bedroom house for social rent costs 40% more to deliver than for the private market.

On the other hand, this funding is unlikely to be channelled towards enough homes for social rent – it is only expected to offer £1bn worth of funding¹⁷, after all. **And even if it does lead to the building of 15,000¹⁸ or even 27,500 homes for social rent a year¹⁹, across the country, that will pale into insignificance compared to the peak of council house building from the 1970s** – and the need to make up for years of under investment in the sector.

It is true that hedge funds are also investing in social housing to rent. **For instance, one of Europe's biggest hedge funds is investing £850m in social housing over three years.²⁰** Cheyne Capital's first deal is with Luton council to build 400 homes that will be available at low rent. This is one of the first direct private investments in social housing from a large City institution. The investment in Luton will see Cheyne Capital develop 400 homes on a site that already has outline planning permission.

This makes sense as the social housing sector should represent a low risk profile for a potential investor; the sector also produces steady and safe returns.²¹ And this does chime with the conviction that Britain needs to move towards the market, individualism, and private enterprise which has dominated policy ideas in the Conservative party since the premiership of Margaret Thatcher.²² Since that time public sector reforms have concentrated on shifting responsibility away from the state.

But Luton has **10,000 people on its housing waiting list and 1,000 people in temporary accommodation.** This level of investment in social housing to rent is not remotely on the scale the country needs. However, it is a step in the right direction, although it must not be viewed as anything more than a drop in the ocean.

Delivering a step change in building will need a more radical solution than either housing associations or the private sector can offer.



Resolution: Revisiting the past

Local authorities must be empowered to build more houses. Councils need to be granted the powers to build social housing themselves, at the required scale, as they were in the past.

Under the Conservative party's Housing Act of 1974, local authorities in England were provided with annual capital allocations from Westminster, devoted to the funding of social housing via a system of annual local authority 'bids' and Government 'allocations'. In 1976, Labour extended that approach when they introduced new arrangements for housing capital expenditure through Housing Investment Programmes. Local authorities were required to prepare annual programmes for the next four years. In return, there would be an annual capital allocation, and this would set the cash limit within which they could spend without scrutiny from the centre. Although the system appeared to present a picture of localised autonomy, in practice the policies were just an extension of central control.²³

Although the system delivered results the number of new council houses delivered per year **peaked at well over 200,000 in the early 1950s under the Conservatives.**²⁴ In 1977, when new social housing was the responsibility of councils they built 121,000 houses.²⁵

And it would be popular with local authorities: **100% of the senior managers and decision-makers within local authorities who were surveyed said they would like to be able to fund and build more housing for social rent directly in their area.**

If the Government is truly committed to delivering more houses for social rent, the funding needs to facilitate the delivery of hundreds and thousands of new homes.

24%

of councils commented that slow construction was a major barrier, rising to 42% in the Midlands, Eastern England, and Yorkshire.

Councils would need to convince central Government they are best-positioned to meet the challenge. Local authorities must demonstrate that they have smarter ways to build and that they can circumvent problems such as the skills shortage that might otherwise hold back housebuilding.

The solution is to use the technology available through MMC and, more specifically, modular building specialists.

When we asked what, if any, are the main barriers preventing councils from building more housing in their area, 46% of the council representatives that were surveyed explained resourcing capacity was an issue. This was an even more serious problem in Eastern England,

200,000

new council houses delivered per year peaked in the early 1950s under the Conservatives

the Midlands and Yorkshire, where 58% of councils reported resourcing bandwidth was holding their housing delivery aspirations back.

Speed of construction is also a challenge. 24% of councils commented that slow construction was a major barrier, rising to 42% in the Midlands, Eastern England, and Yorkshire.

The skills shortage within the construction industry also needs to be considered; 35% of councils in England explained that this was one of the main barriers preventing councils from building more housing in their area.

This is a serious concern given that the skills gap is only set to widen. As detailed in our 'Sustainability in the Supply Chain' report, the UK is heavily reliant upon imported labour.

“100% of the senior managers and decision-makers within local authorities who were surveyed said they would like to be able to fund and build more housing for social rent directly in their area.”

²³ Housing Policy in the UK, David Mullins, Edited by Alan Murie, 2004, p.35

²⁴ How did the crisis in UK social housing happen?, The Guardian, Matthew Weaver, 4th October 2017

²⁵ Why housing associations are the true villains of the property crisis, The Spectator, Ross Clark, 25th July 2015

²⁶ The impact of Brexit on construction sector laid bare, Scape Group, Matt Carrington-Moore, 24th March 2017

“ £204m of funding for innovation and skills in the construction sector, has been pledged by the Government ”

Since the financial crash in 2008, the UK construction sector has become increasingly dependent upon talent from the European Union. The proportion of EU migrants in the construction sector rose from 3.65% to 7.03% between 2007 and 2014.²⁶

Given the growing likelihood of a no deal Brexit, the flow of critical migrant workers looks uncertain. This sits on top of a rapidly ageing workforce and an existing lack of replacement workers with the necessary skillset, which is already negatively impacting the feasibility, cost and quality of projects.

The Government is going some way to tackling the domestic skills gap with construction T-levels, spending more than **£500m a year on new-style technical courses that offer an alternative route than A-levels into many careers.** It has pledged £204m of funding for innovation and skills in the construction sector, including training a workforce to build new houses, and £34m to scale up innovative training models across the country. This is a positive step forward and vital for a sector where capacity, simply cannot be stretched any further. But these initiatives will not plug the growing skills gap overnight, they are arguably too little too late for an issue that has been on the horizon for some time, especially if we lose access to a labour pool consisting of 500m people next year.

The skills shortage across the construction industry is, however, not the whole story: 16% of councils have reported skills shortages within their own organisation – **although this was a much larger problem in the North of England where 23% of councils reported this was one of the main barriers preventing them from building more housing in their area.**

£500m

is being spent each year on new-style technical courses that offer an alternative route to A-levels

23%

of councils in the North of England reported that the skills shortage was one of the main barriers preventing them from building more housing

Embracing Cutting Edge Technology

Modern Methods of Construction (MMC) offer immediate solutions to these challenges.

MMC includes panellised units produced in factories and assembled onsite; volumetric construction to produce modular units in factories prior to transport to site; and hybrid techniques that combine both panellised and volumetric approaches; and floor or roof cassettes, pre-cast concrete foundation assemblies, pre-formed wiring looms, mechanical engineering composites and innovative techniques such as tunnel form or thin-joint block work.

Essentially, MMC are more broadly based than a focus on product, they involve better products and better processes.

97%

of councils reported that they thought a pre-designed system with offsite construction would support their delivery certainty

MMC aims to improve business efficiency, reduce client intervention, deliver a quality product, increase customer satisfaction, whilst providing long-term environmental performance and hugely condensed delivery timescales. This approach also reduces snagging costs due to process being subject to the tighter quality control made possible in factory conditions; and the need for onsite inspection decreases as the amount of offsite work increases.

MMC can also help to minimise waste, which is an important environmental consideration for councils. When we asked housing leaders how important their local authority considered minimising construction waste in achieving quality and lower cost affordable homes, 22% said 'extremely important' with 57% saying the same in London and the south east.

It is possible to build up to four times as many houses with the same on-site labour required for a traditional build, using MMC. This is crucial when the domestic skills gap, Brexit, and the need to build more housing places increasing demands on existing resources.



There is uncertainty about whether onsite labour supply will increase to match higher demand. MMC have the potential to provide more building work with existing levels of onsite labour, particularly as factory-based production does not generally draw from the same labour pool as onsite construction and is not competing for the same skills.²⁷ Onsite construction time could be reduced by more than half. Building performance could be at least as good and cost ranges would be comparable, depending on specific project circumstances.

RAPLOCH MODULAR HOUSING - THE FUTURE IS NOW



That is the theory, but we also know that it can be achieved in practice because this is a system which is already being rolled out in Stirling, Scotland. By using a unified palette of wall and roof materials, and fittings such as doors and windows, in addition to using volumetric offsite construction techniques, modules can be delivered to the construction site then be connected to foundations and finished to the required specification.²⁸

Fortunately, councils are open to the possibilities presented by MMC. When we asked if local authorities would consider MMC as an option for housing delivery in their area, **100% of council representatives informed us that they would.**

100%

of councils stated that they would consider MMC as an option for housing delivery

²⁷ Using modern methods of construction, National Audit Office, November 2005

²⁸ Raploch regeneration, Stirling



(Left and above) Raploch Regeneration Scheme, Stirling

97% of councils reported that they thought a pre-designed system with offsite construction would support their delivery certainty. And 35% of local authorities said they would consider stipulating the use of increasing levels of offsite fabrication or a modular approach to housing units – if only to increase certainty of delivery of their required housing supply.

Unfortunately, the possibilities represented by MMC are currently going largely untapped. When we asked council representatives how important MMC or offsite construction were to achieve their housing supply, **just 22% said they were very important, with just 15% reporting the same in the North of England (where 20% responded “not very important at all”).**

Scape Procure
Major Works | Scotland

ROBERTSON

Case Study:

A new approach to modular housing

In England, a modular approach to school building is being used, combined with significant residential expertise to design fast, cost effective housing.

With everything constructed offsite, it is a perfect model for tight urban plots, tough timescales and ambitious targets.²⁹ A new concept that has been developed by architects Lungfish, for a residential development in North Lincolnshire, is being submitted for planning approval in 2018/19.

The ambition is for this modular design to be rolled out and adapted to any local environment, as well as acting as a future blueprint for the Government and construction industry. The modular approach to building minimises time spent onsite, provides cost certainty, and enables rapid evaluation of potential plots.



LUNGFISH

²⁹ Modular £multi-million residential project

Conclusion

While this paper proposes a radical solution to the social housing building problem, delivering the number of homes we need to build to make up for years of underinvestment, requires a revolution in the delivery of social housing. Registered providers and local authorities, looking to accelerate their building programmes – for social rent or otherwise – should consider the benefits of MMC.

However, there is more that can be done. In its Industrial Strategy published in November 2017, the Government committed to supporting MMC, particularly offsite construction. The Government must consider ways of using the planning system to make it easier to build modular developments. For example, pre-approved modular designs could be ‘fast tracked’ through the planning system. And while there are now plenty of providers, none are currently delivering at the scale needed to bring costs down below those of traditional methods. High quality providers, capable of delivering at scale, should be supported by Government, with a strategy to ensure collaboration and encourage consolidation.

A core principle behind scenario planning is that it is impossible to predict an inherently unpredictable future. That same uncertainty, however, should be empowering. The uncertainty surrounding the future highlights the possibility of many different future scenarios, which signals our own ability as individuals, organisations and whole societies to shape change.

We hope that the research, analysis and recommendations contained in this report go some way to help all those with a stake in the building of housing for social rent as well as helping to create a future that is brighter, happier and more productive.

“ Pre-approved modular designs could be ‘fast tracked’ through the planning system ”

Methodology

The poll of 50 senior local authority officers with management responsibility for housing in their council was conducted by survey consultancy, Censuswide. Censuswide complies with the MRS Code of Conduct (2010) which is based upon the ESOMAR principles.

The consumer poll of 1,000 adults was undertaken by research agency, OnePoll. OnePoll are members of ESOMAR and employ members of the MRS.

About Scape Group

Scape Group is a public-sector partnership that helps to improve the buildings that we use, the roads we travel on and the places we live

First trading in 2006, we offer a suite of fully managed frameworks, property services, innovative design solutions, community investment opportunities and joint ventures that are available to any public body in the United Kingdom.

As a public sector organisation, we fully appreciate the role that the built environment plays, in the context of service delivery and the local economy. We also recognise the pressures involved in procuring and delivering more-for-less in these austere times.

All of our services have been designed with these challenges in mind – to support the entire lifecycle of your built environment, to help create a smooth procurement journey, to stimulate local growth in communities and to deliver demonstrable outcomes on every project.

We operate across the United Kingdom, with offices located in London, Nottingham, Cardiff and Glasgow.



Scape Group
Level 2
City Gate West
Tollhouse Hill
Nottingham
NG1 5AT

+44 (0)115 958 3200
general@scapegroup.co.uk

For press enquiries, please contact:

Instinctif Partners: 0207 866 7854

laura.taylor@instinctif.com
james.mcewan@instinctif.com

scapegroup.co.uk

 @Scape_Group

 /scape_group