# **UDIA** National Housing Pipeline®

## National Pilot 2024

### Executive Summary

Released November 2024

Urban Development Institute of Australia
NATIONAL

# Acknowledgements


The results published in this report would not be possible without the assistance and support from a broad range of stakeholders and collaborators, which includes:

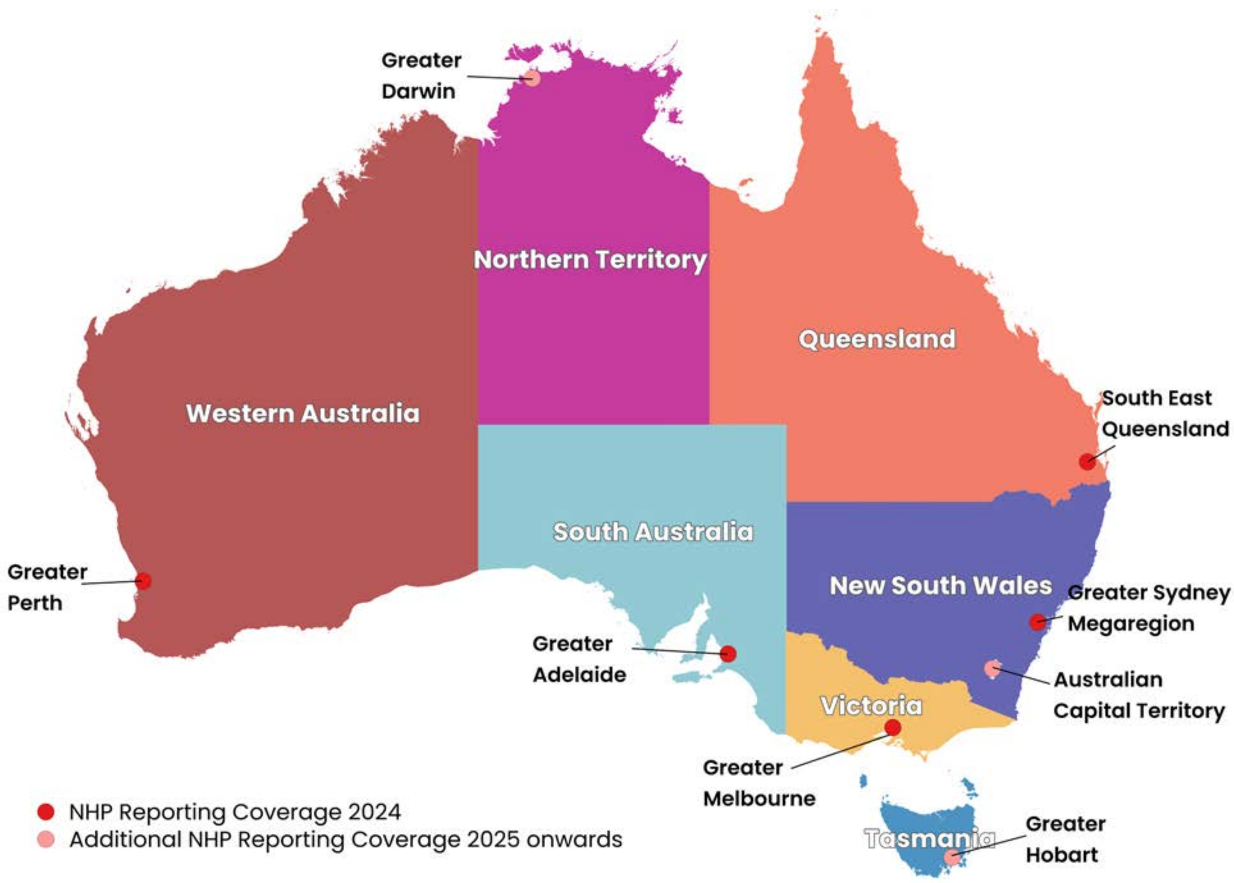
**UDIA State Divisions** - for driving the local collation of key data inputs and insights

**UDIA members** – for providing project scale data through the survey phase, and participating in technical workshops and Outlook forums across the nation.

**The Australian Urban Design Research Centre (AUDRC)** – for facilitating the creation of the developer intentions survey

**Government Authorities & Agencies** – for proving receptive and supportive of the NHP program inclusive of provision of certain spatial and tabular data sets which have been assimilated into the baseline reporting.


### Figure 1: Capital City Regions covered in the NHP 2024 study



# Contents

# Foreword

The UDIA National Housing Pipeline® project is a window into the future of residential dwelling supply across Australia's major capital city regions. The depth of the research and analysis has been result of a broad collaboration of UDIA members, local, State and Federal Government agencies, and key property sector stakeholders across the nation.

The UDIA National Housing Pipeline® (NHP) project is underpinned by a vision to help facilitate improved infrastructure coordination and land use planning, leading to robust forward land supply pipelines which can deliver thriving new communities and community infrastructure across the nation.

The NHP is striving to provide a nationally consistent approach to auditing the supply of 'development ready' land stocks, and assembling short, medium and longer term dwelling delivery forecasts.

The UDIA National Housing Pipeline® (NHP) project has identified a potential shortfall of approximately 395,000 dwellings across the NHP reporting regions during the Housing Accord Period. This is a larger deficit than the National Housing Supply and Affordability Council (NHSAC) recently forecast (through high level modelling) for the entire nation over the Accord's five-year period (~300,000 dwelling shortfall).

Notwithstanding differences in aggregate dwelling shortfall estimates, there is no doubt that Australia is going to significantly underdeliver on the production of new housing against underlying and unmet demand over the coming five years to 2029. This should not be accepted as an outcome. Waiting any longer before taking corrective action on housing supply will only ensure more people are denied an opportunity for a place to call home.

We know that meeting our housing targets will not be solved by pulling one lever alone. UDIA acknowledges the work to date undertaken by various levels of government to address the housing crisis, however UDIA through the NHP has identified a range of further reforms and interventions that will improve housing delivery.

Implementation of UDIA's recommendations will increase the likelihood of moving closer to delivering the National Housing Accord targets. We need to see a diversity of typologies, increased investment in enabling infrastructure, and State and Territory Governments genuinely prioritising housing supply through planning system reforms and improvements. In all jurisdictions we also need to see a far greater level of coordination between infrastructure delivery agencies in order to unlock, and in many cases fast-track supply.

The deepening housing crisis across the nation means it has never been more important for Government to work with industry to identify key barriers and challenges, and collaborate on the development of solutions.

We seek to continue this collaboration with projects like the NHP where it is vital to share data and have a good understanding of the 'real supply' pipeline through developer intentions intelligence and a clear line of sight of the issues holding back housing delivery.

Col Dutton, UDIA National President

# About The UDIA National Housing Pipeline®

UDIA has long advocated that there is an ongoing disconnect between State and Territory government reporting of available land supply for forward residential development, versus the on-the-ground experience and perspective of forward land availability from developers and industry practitioners.

Across the nation UDIA members have consistently reported (at least over the last two decades) that State Government land supply monitoring programs have typically focussed too heavily on zoned land stocks for calculating forward dwelling production potential - without adequately accounting for the array of development constraints and challenges that will inevitably reduce aggregate dwelling production.

There has also been inconsistent and patchy inclusion of site-by-site development intelligence provided directly by developers and land-owners into forward land supply and dwelling production forecasting exercises.

The National Housing Pipeline® has been designed to help 'fill the gaps' in the key inputs and methodological inclusions/exclusions of official State Government land supply monitoring programs.

With this background, the UDIA National Housing Pipeline® core aims are expressed as follows:

1. To provide an **objective** and **robust** assessment of the state of play of land availability and land readiness for residential development across Australia's major housing markets.
2. To **quantify** the forward **pipeline of land supply** and **residential dwellings** anticipated for development, by location, with annualised release/commencement timings.
3. To provide an **annual assessment** of **development constraints** as well as an audit of the status of **enabling infrastructure** (water, sewer, power and roads) and **approvals** required to realise these yields.

This NHP Executive Summary Report and the accompanying **NHP Technical Report** provide key findings, insights and recommendations collated across the National Pilot of this new UDIA research initiative, which has run from November 2023 to October 2024. This reporting marks the completion of the NHP Pilot and has confirmed the forward agenda for annual NHP project phase execution and reporting.

# Introduction

## What is the UDIA National Housing Pipeline®

The UDIA National Housing Pipeline® provides an annual snapshot of the 'real supply' of land available for residential development across Australia's major urban regions over the short, medium and long-terms, including estimates of forward dwelling production potential.

The NHP provides a development industry-vetted perspective on the status of 'development ready' land supply by linking how much total potential supply is constrained or unable to be developed due to constraints (such as environmental or infrastructure), as well as quantifying how much 'real world' potential dwelling supply is being held up by planning and environmental approvals, as well as service infrastructure provision planning requirements and processes.

The land and dwelling capacity is then broken down by:

1. Geographic location;
2. Housing typology;
3. Expected time frame for commencement.

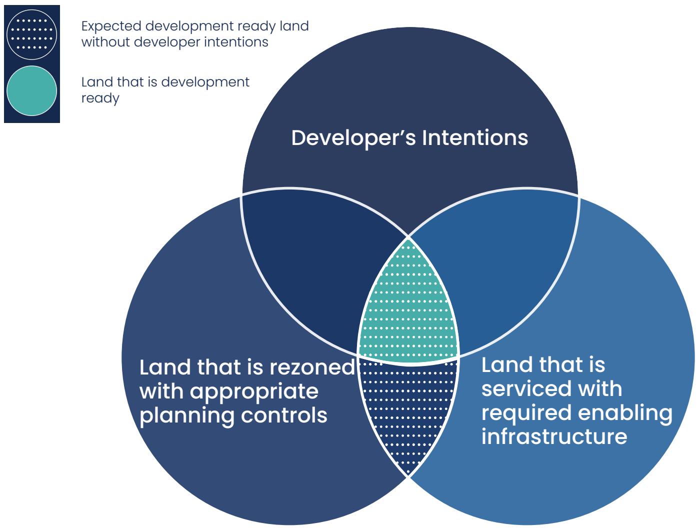
There is an increasing convergence of understanding across industry and government on the types of constraints that inhibit or slow housing delivery. There are not, however, consistent ways of measuring or reporting on these constraints - which is an arena the NHP is attempting to fill.

Missing infrastructure, slow/non-responsive planning approval pathways, complex concurrence and referrals, and market conditions all play a role in constraining the pipeline. Reliable reporting metrics are needed to address the array of limitations in data availability.

The Venn diagram presented in Figure 2 illustrates why the pipeline of development ready land has not been well understood by government departments and service agencies nationwide. Without a detailed understanding of 'real world' developer intentions, and without a detailed understanding of constraints, there will always be a reliance on theoretical yield estimations and usually an inflated expectation of how much land is 'development ready'.

The NHP has been designed to bridge this data gap, providing a reliable, ground-truthed understanding of what can be delivered, where, and when over a 15-year housing supply horizon. Using developer intentions, the NHP reveals the regions where genuine opportunities exist to streamline, unlock, and bring forward the future housing pipeline with the right infrastructure and planning focus at the right time.

**Figure 2: The Development Ready Land Intersection**




UDIA will use this evidence base in our ongoing advocacy to Government as it seeks to prioritise investment in key housing enabling infrastructure and make planning and policy changes to support the objective of dramatically increased housing delivery by pushing more projects into the 'development ready' portion of the Venn diagram.

# Summary Of Key Findings: National

1. *The Combined Capital City 2024 NHP dwelling production forecast will be more than <u>395,000 homes below</u> the five-year Housing Accord target*


**Figure 3: Aggregate Forecast Dwelling Supply & Shortfall during the Housing Accord Period (Combined Capital Cities)**

*Source: UDIA*

2. *More than a third (37%) of all identified zoned and potential future urban zoned land has development constraint overlays which will sterilise or significantly reduce forward dwelling production*

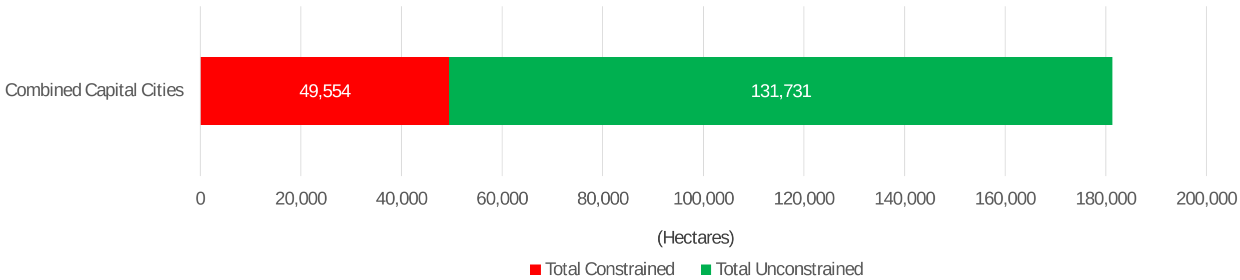



**Figure 4: Total volume of development constrained & unconstrained land stocks (Combined Capital Cities)**

*Source: UDIA*

3. *One third (33%) of combined Capital City NHP survey yields require <u>one or more types of enabling infrastructure</u> to progress to dwelling commencement status*

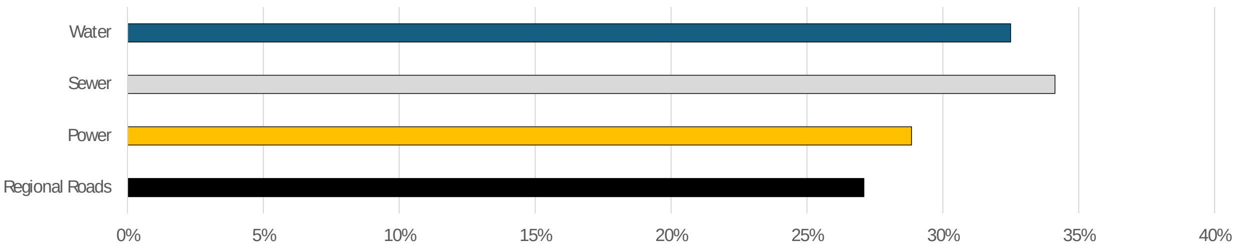



**Figure 5: Proportion of Dwelling Yields Requiring Enabling Infrastructure Commitment/Funding (Combined Capital Cities)**

*Source: UDIA*

# Summary of Key Findings: State by State

Table 1: Capital City Summary

| Region | Assessed land supply identified as having at least one type of development constraint overlay | Proportion of surveyed dwelling yield that requires commitment/ funding for enabling infrastructure | Forecast dwelling undersupply against target across National Housing Accord period (2025 – 2029) |
|---|---|---|---|
| **Greater Sydney Megaregion** | 59% | 48% | **-47%** |
| **South East Queensland** | 45% | 58% | **-45%** |
| **Greater Melbourne** | 18% | 31% | **-39%** |
| **Greater Adelaide** | 39% | 56% | **-34%** |
| **Greater Perth** | 29% | 38% | **-24%** |

# Aggregate Land Supply Snapshot

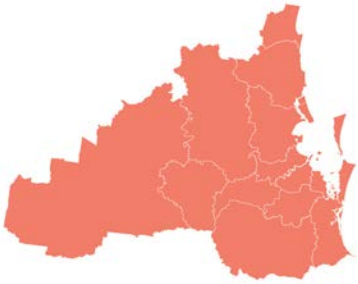
## (As at June 2024)

### Sydney Mega-Region

- **16,700 hectares** of undeveloped zoned land for residential development
- **59%** of zoned residential land identified as 'constrained' and unable to deliver full (theoretical yields) of new dwelling supply.
- **6.4 years of supply** left in undeveloped and unconstrained residential zoned land (@25 dwells/gross ha) at annual Housing Accord delivery required rate.

### South East Queensland

- **11,275 hectares** of undeveloped zoned land for greenfield residential development.
- **9,223 hectares** of land supply identified as 'constrained'.
- **45%** of zoned land is identified as 'constrained' and unable to deliver new dwelling supply.
- **3.2 years supply** left in 'urban residential' and 'Priority Development Areas' at the current industry delivery rate. *Note – does not include infill supply locations.*



### Greater Melbourne

- **13,180 hectares** of undeveloped zoned land for residential development.
- **18,970 hectares** of unconstrained potential future zoned land for residential development.
- **18%** of zoned residential land identified as 'fundamentally constrained' and unable to deliver full (theoretical yields) of new dwelling supply.
- **5.2 years of supply** left in undeveloped and unconstrained residential zoned land (@25 dwells/gross ha) at annual Housing Statement delivery required rate.

### Greater Perth

- **9,166 hectares** of undeveloped zoned land for residential development.
- **16,220 hectares** of unconstrained potential future zoned land for residential development.
- **29%** of zoned and potential future zoned land identified as 'constrained' and unable to deliver full (theoretical yields) of new dwelling supply.
- **6.1 years of supply** left in undeveloped MRS urban zoned land (@20 dwells/gross ha) at annual Housing Accord delivery required rate.

### Greater Adelaide

- **7,239 hectares** of undeveloped urban (residential permissable) zoned + residential broad-hectare land for residential development
- **914 hectares** of future urban growth areas identified.
- **39%** of zoned and potential future zoned land identified as 'constrained' and unable to deliver new dwelling supply.
- **6.7 years of suply** left in undeveloped urban zoned and residential broad-hectare land (@20 dwells/gross ha) at annual Housing Accord delivery required rate.

# Development Constraints Assessment: National Summary

- The 2024 NHP Pilot analysis identified a total of 84,114 hectares of undeveloped urban (urban/residential development zoned) land stocks across the five capital city reporting regions, with an additional 47,620 hectares that are identified in metropolitan/regional strategic plans as potential future residential designated land stocks.
- NHP development constraints mapping and analysis has revealed that more than a third (37%) of aggregate land stocks have development constraint encumbrances which will reduce or sterilise land from forward dwelling production.
- Environmental constraints are the most common development constraint across the nation accounting for an average of 67% of total constrained lands across the five NHP capital city regions.
- Other common development constraints include easements and buffers for utilities and transport infrastructure as well as provisions for future open space and school sites.
- The NHP constraints mapping highlights that there is a significant disconnect between the industry's view of the volume of land which is able to be developed for future housing versus most State Government land supply monitoring estimations.
- Please refer to the accompanying **NHP Technical Report** for further detail and insights on this project phase.

37%

of zoned and potential future zoned residential land has development constraints reducing or sterilising forward dwelling production.

**Figure 6: Constrained and Unconstrained Aggregate Land Stocks (hectares)**

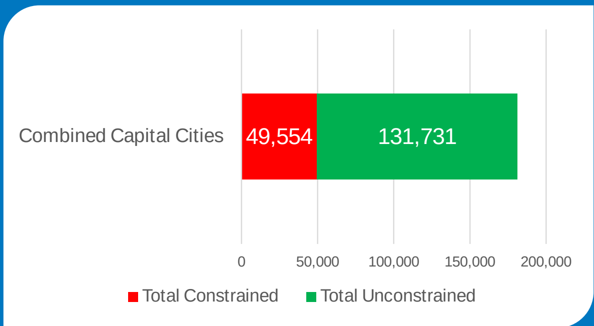
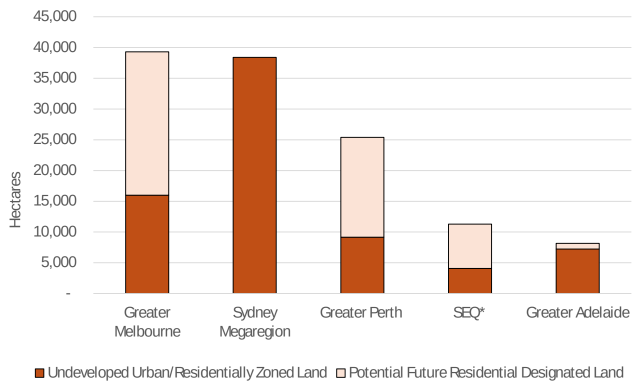



**Figure 7: Aggregate Undeveloped Urban/Residential Zoned and Potential Future Urban Zoned Land Stocks (June 2024)**




*Excludes land supply in infill locations

**Figure 8: NHP Development Constraints Assessment Summary* (June 2024)**

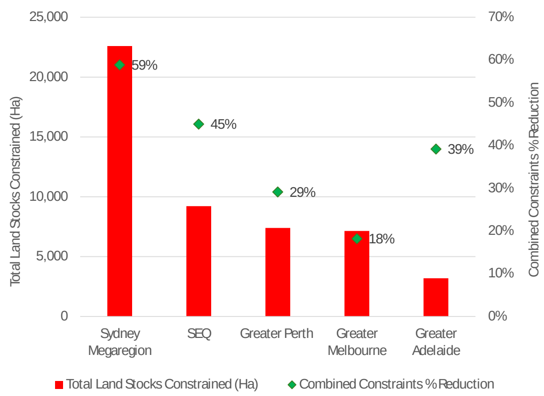
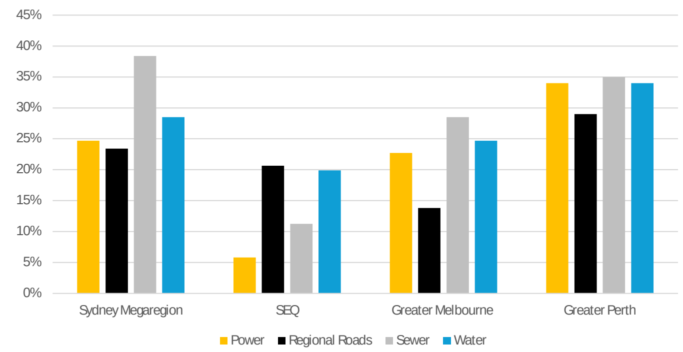



*Figure Includes Fundamental & Additional Constrained Land stocks

# Developers Intentions Survey: National Summary

- The 2024 NHP Pilot developers intentions survey phase collected site information, estimates of dwelling yields and the status of enabling infrastructure and approvals for over 450 undeveloped development sites across Australia.
- The total potential dwelling yields from these surveyed land holdings could realise at least 250,000 dwellings.
- The vast majority of landholdings require at least one type of enabling infrastructure commitment/funding and/or various types of planning, environmental or building approvals in order to commence development of new residential product supply.
- There is considerable spatial variation in project requirements for enabling infrastructure. The NHP provides a road map for where state government investment needs to be focussed.
- Please refer to the accompanying **NHP Technical Report** for further detail and insights on this project phase.

**Figure 9: Proportion of Dwelling Pipeline Yield Requiring Funding/ Commitment, By Type**




33%

of Combined Capital City NHP survey yields require one or more types of enabling infrastructure commitment/ funding.

**Figure 10: Total NHP Dwelling Yields Requiring Approval, by Type**

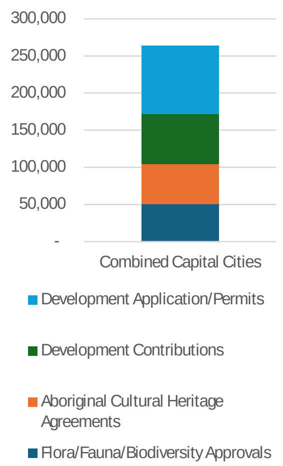
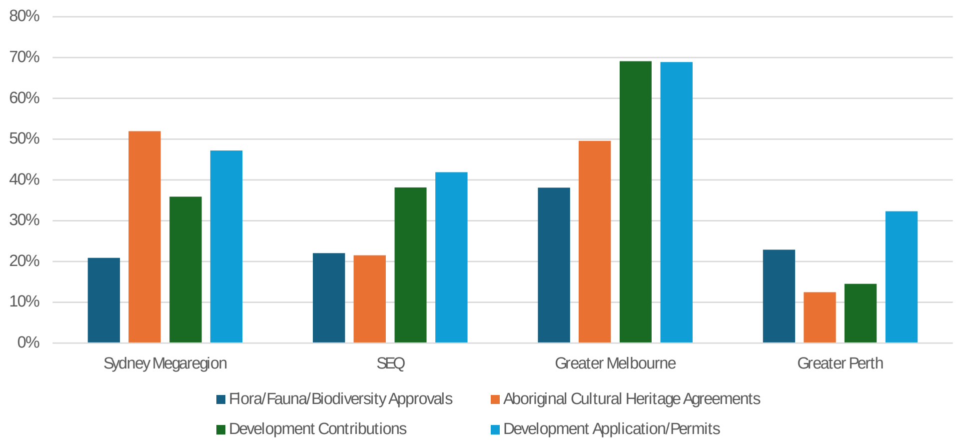



**Figure 11: Proportion of Dwelling Pipeline Yield Requiring Approval, By Type**




** There was an insufficient survey sample from Greater Adelaide to provide this data point insight.*

# The NHP & Annual Housing Targets

- The annual reporting cycle of the UDIA National Housing Pipeline® allows for a regular stocktake of how each NHP reporting region is tracking against State and Territory housing targets.
- In Appendix 1 a five-year dwelling production forecast is provided for each capital city reporting region - based on core NHP data in addition to additional supply intelligence*. In future NHP reporting releases, UDIA will publish ten-year dwelling production forecasts for each reporting region – subject to the collation of sufficient levels of developer intention survey returns.
- At the Combined Capital City scale, Figure 12 presents the long run history of aggregate dwelling completions and approvals as well as the 2024 NHP five-year forecast to 2029. This analysis indicates that there will be a **around a 395,000 dwelling completion shortfall** within the NHP capital city reporting regions against the National Housing Accord target over the coming five years. This significant shortfall is underpinned by expectations of sustained weakness in the multi-unit sector.

**Figure 12: Combined Capital City Annual Dwelling Completions, Approvals and Aggregate NHP Dwelling Suppy Forecast (FY)**

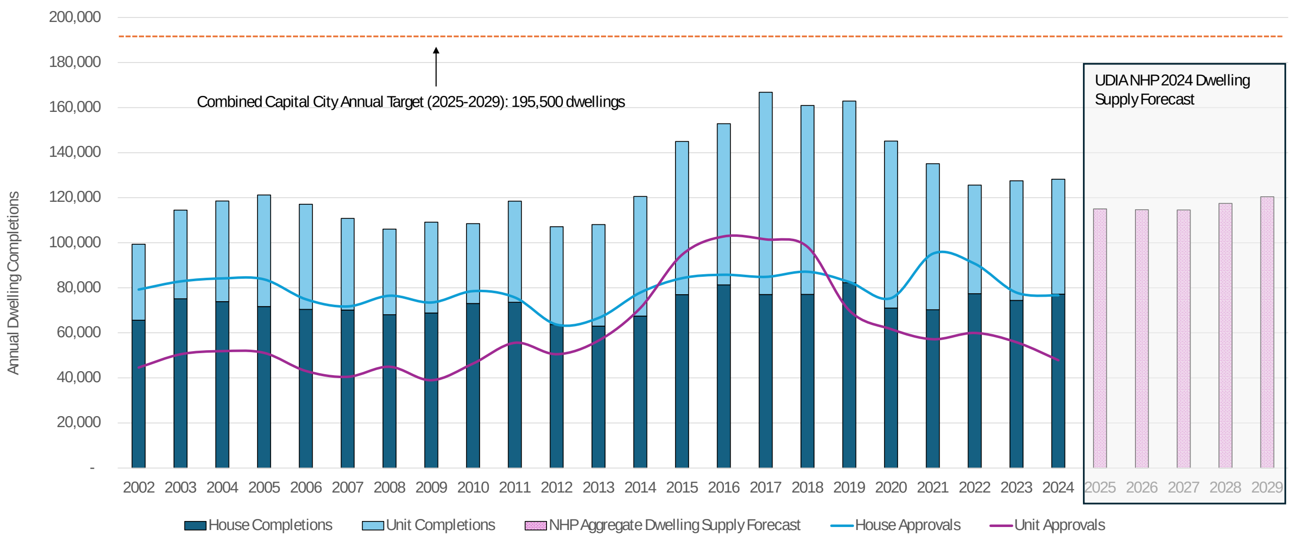



**Figure 13: Cumulative NHP Dwelling Supply Forecast Versus Combined Capital City Annual Dwelling Target Across Accord TIme Period**

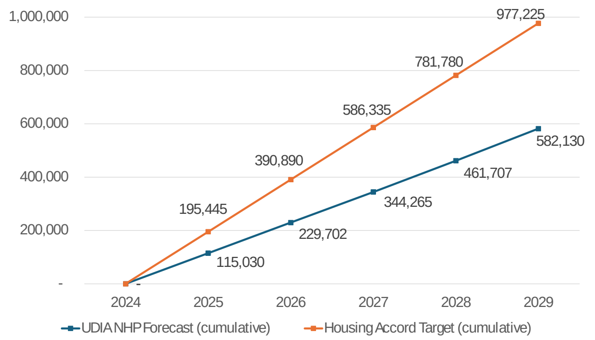
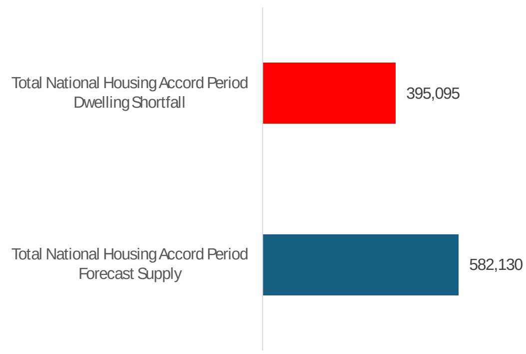



**Figure 14: Combined Capital City Dwelling Shortfall and Forecast Supply (2025-2029)**




*Inclusive assessment of NHP survey forecasts, in addition to UDIA *State of the Land* foward yield estimates (drawing from Research4s National Land Survey Program greenfield land supply data and Cordells milti-unit project supply), with overlays of longitudinal modellling of ABS dwelling approvals, commencements and completions*

# Recommendations

Based on the NHP 2024 analysis UDIA offers the following recommendations to each State Government and the Federal Government to help boost forward housing supply across the nation:

1. **Increase investment, accelerate timing, and improve coordination of enabling infrastructure.**
   *Each State Government needs to prioritise strategically important enabling infrastructure to unlock new residential supply in key growth corridors and precincts.*

2. **Improve planning certainty & streamline approvals processes.**
   *Fast-track reforms to the complex, long-winded and costly planning systems which are a leading cause of strangulation of new housing supply. Far greater streamlining to planning approval assessment & improved planning certainty (particularly for strategically significant projects) is a critical step towards improving timely new home supply and affordability across each Capital City region.*

3. **Stronger collaboration between industry & Government.**
   *That each State Government and the Federal Government better aligns its understanding of the forward pipeline with developer intentions, looking to incorporate the data and methodology used in the UDIA NHP and prioritising the use of industry intentions to support infrastructure investment decisions.*

4. **Prioritise addressing development constraints in key growth corridors.**
   *That each State Government commits to seriously addressing the development constraints and development challenges holding back supply in priority growth corridors through preparation of targeted plans with support from all levels of government to unlock more land for timely development commencements.*

5. **Deliver more strategic and efficient environmental approvals frameworks.**
   *State Governments work effectively towards reform to the environmental approval systems that balance the protection of environmental assets and the critical delivery of new homes through greater clarity and certainty.*

6. **Federal Government should create a single, simple approval pathway assessment system incorporating Federal and state requirements.**
   *This includes through agreed regional plans, consistent mapping & avoiding duplication.*

7. **The National Housing Supply and Affordability Council (NHSAC) should collaborate on, coordinate with, and adopt appropriate parts of the UDIA NHP evidence base.**
   *This will establish reliable, independent metrics that measure performance across housing markets.*

8. **Federal Government should accelerate enabling infrastructure for States & Territories.**
   *Provide $5bn extra Federal infrastructure funding for more projects that support new infrastructure which unlocks new housing supply. Apply part of the Federal Accord Bonus to enabling infrastructure that unlocks housing rather than pay states at the back end of the Accord period.*

9. **Federal Government should provide Accord bonus incentives for States and Territories to streamline planning across the housing continuum.**
   *Provide upfront funding to States & Territories for housing construction certificate targets, and apply that funding to new homes, rather than waiting for build commencements. Add incentives for States and Territories to access the bonus upfront for increasing density, halving planning times/environmental approvals or accelerating zoning. Adopt mandatory KPI's by Federal, State and Territory Government agencies to boost housing and affordability and overcome market barriers.*

# Conclusions and Next Steps

The publication of this Executive Summary and the accompanying **Technical Report** marks the completion of the 2024 UDIA National Housing Pipeline® Pilot. A core objective of the Pilot was to trial the execution of the five phases of the NHP methodology in all of the major mainland Australian capital city regions, with a view to embedding a new annual cycle of data collation, events and reporting outputs for UDIA National in addition to each UDIA State Office.

The NHP Pilot confirms the critical importance of quantifying development ready land stocks, highlighting the extent of development constraints across greenfield and urban infill locations, and providing a robust evidence base for producing short, medium and longer term dwelling supply forecasts.

The NHP has identified major divergences in official government authority projections on forward dwelling supply from what can realistically be delivered. There is an enormous challenge facing each capital city to significantly lift aggregate dwelling production output - to bridge the very significant dwelling shortfalls against National Housing Accord and State Government housing targets.

A clear message emerging from the NHP Pilot is that across Australia's major housing markets development is time consuming, costly and complicated. As time frames continue to be pushed out for various reasons, two things can happen:

1. Housing does not get delivered in a timely fashion to serve the needs of an expectant community or meet the objectives of all Government tiers.
2. Housing becomes more expensive as developers accumulate a range of holding costs that must be added to the final sale price.

The NHP Pilot confirms that while there is no single lever that can be pulled to address the complex nature of the housing crisis, there is great benefit in all stakeholders nationally, statewide and locally, collectively and collaboratively using the same/similar data and evidence base.

UDIA is of the strong view that future decision making on infrastructure investment, urban land release and planning control flexibility cannot be accomplished without a fulsome understanding of developers' capacity and intentions.

We encourage all Government agencies and departments to continue to frame the land supply narrative in a collaborative effort that embeds a detailed evidence-base which identifies developer intentions into future decision making. UDIA looks forward to including these annual findings in our ongoing engagement across various levels of government across the nation. It is critically important that any plan for housing and enabling infrastructure is backed by industry experiences, and the NHP provides the ideal plataform to put this into action.

The NHP Pilot has highlighted various arenas for methodological tightening including the clarion need to align the timelines for project phase execution across all States. Accordingly, the 2025 UDIA National Housing Pipeline® program will adhere to the roll-out schedule displayed in Figure 15 on the next page.

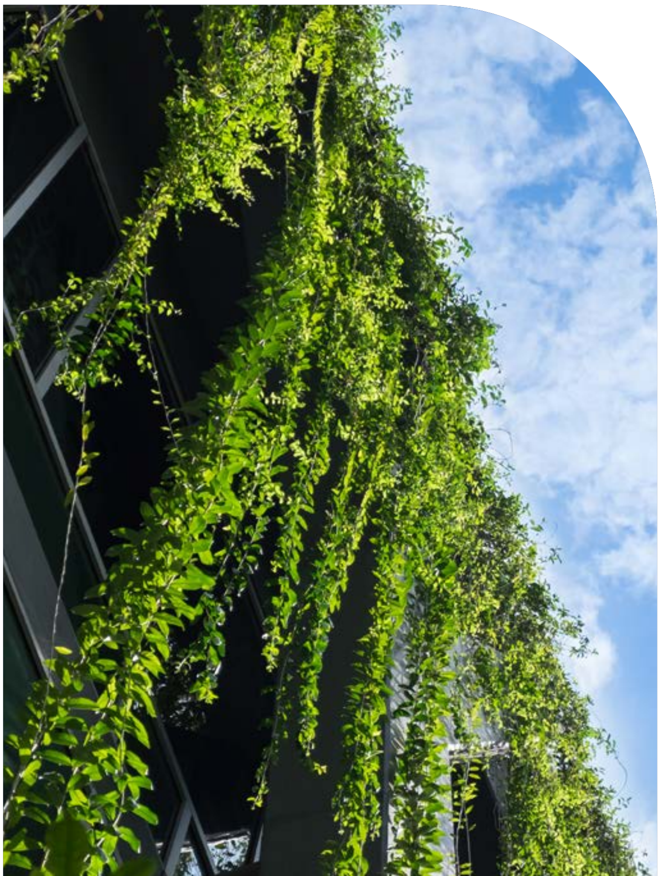



**Figure 15: NHP 2025 Project Phase Timings**

# Appendix 1: NHP Capital City Supply Forecasts v Targets (2025 – 2029)

## Sydney Megaregion

**Figure 16: Cumulative Forecast Dwelling Supply Versus Sydney Megaregion Housing Target**

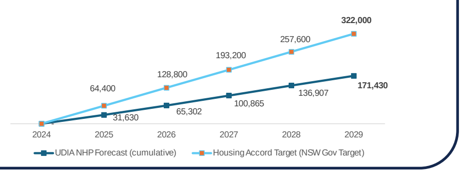
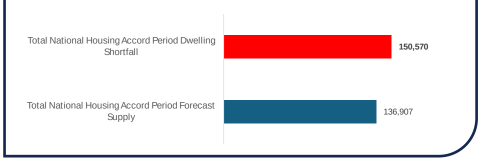



**Figure 17: Aggregate Forecast Dwelling Supply & Shortfall During Housing Accord period**




## South East Queensland

**Figure 18: Cumulative Forecast Dwelling Supply Versus South East Queensland Housing Target**

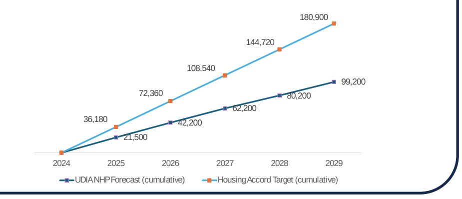
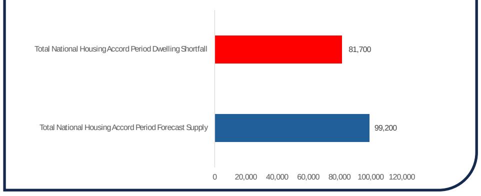



**Figure 19: Aggregate Forecast Dwelling Supply & Shortfall During Housing Accord period**




## Greater Melbourne

**Figure 20: Cumulative Forecast Dwelling Supply Versus Greater Melbourne Housing Target**

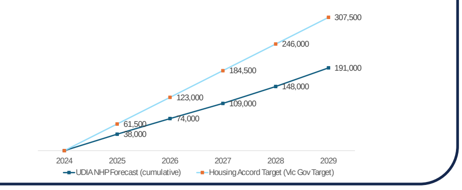
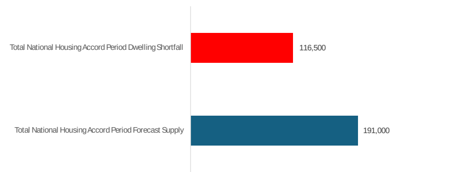



**Figure 21: Aggregate Forecast Dwelling Supply & Shortfall During Housing Accord period**




## Greater Perth

**Figure 22: Cumulative Forecast Dwelling Supply Versus Greater Perth Housing Target**

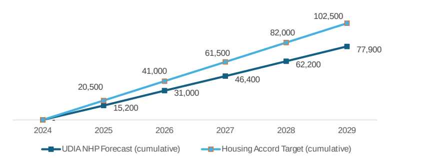
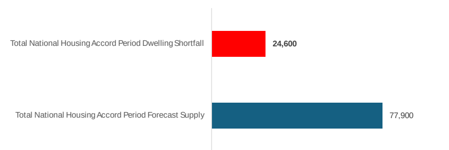



**Figure 23: Aggregate Forecast Dwelling Supply & Shortfall During Housing Accord period**




## Greater Adelaide

**Figure 24: Cumulative Forecast Dwelling Supply Versus Greater Adelaide Housing Target**

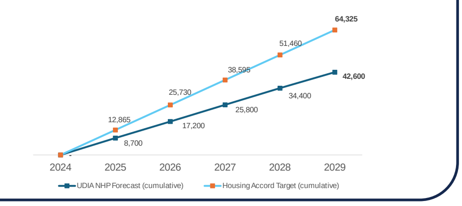
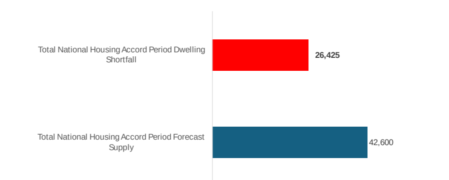



**Figure 25: Aggregate Forecast Dwelling Supply & Shortfall During Housing Accord period**



# Appendix 2: Project Methodology

The UDIA National Housing Pipeline® methodology harnesses a combination of 'top-down' and 'bottom-up' data inputs to provide a robust and holistic perspective of the status of residential land supply and the implications for future housing production across each major Capital City Region.

The project is designed around five key phases as set out in Figure 26 below:

**Figure 26: The UDIA National Housing Pipeline Methodology**

### Land Supply & Development Constraints Mapping

**Phase 1:** Collation of up-to-date undeveloped urban zoned land and potential future zoned land for residential development. These land stocks are then overlaid with 'development constraints' * to identify what land is actually available for forward residential development.

### Developer Intentions Survey

**Phase 2:** Deployment of an on-line Developer Intentions survey seeking identification of undeveloped land holdings, total and year-on-year dwelling yield expectations as well as the status of approvals and enabling infrastructure requirements.

### Technical Workshops

**Phase 3:** Assembly of industry experts in a facilitated workshop environment to pressure test the Phase 1 preliminary findings & provide advisc on additional supply points not accounted for in Phase 2.

### Outlook Forums

**Phase 4:** Delivery of sub-regional scale outlook Forums which bring together developers, Councils, State Government Agencies, Infrastructure providers and consultants to present Preliminary NHP findings and collect further insights on development constraints, land supply and infrastructure servicing challenges.

### Reporting & Advocacy

**Phase 5:** National & State scale reporting and advocacy focused on key NHP program highlights including aggregate stocks of 'development ready' land supply, blockages in approval pathways and enabling infrastructure provision and 10 -15 year forecasts of dwelling pipelines by typology.

### Engagement with Government

Prior to the commencement of these five project phases ,and also throughout each of the project phases, the UDIA engages with a broad array of local, State and Commonwealth government agencies on how the NHP analysis can complement existing government land supply and infrastructure coordination programs such as the Urban Development Programs in NSW, Victoria and Western Australia, the Growth Monitoring Program in QLD and the Plan SA Land Supply Dashboard.

# Appendix 3: Project Limitations

The major capital city region Pilot of the UDIA National Housing Pipeline® (NHP) conducted between November 2023 and October 2024 sought to trial a suite of new data collection and UDIA developer member engagement processes and the introduction of a new stream of events. Throughout these program phases, UDIA noted various challenges and avenues for pursuing improved reporting in forward years.

One of the most significant challenges encountered across the nation through the Pilot was accessing the most up-to-date and accurate data on land supply and development constraints. In essence this challenge related to the translation of high-level methodologies into accurate reporting on a site-by-site basis.

To adhere to appropriate probity and confidentiality conditions of supply, none of the developer provided supply information in the NHP is reported at an individual site level.  While the NHP reporting is informed by site-by-site intelligence all reporting has been aggregated and presented to sub-regional and regional scale.

UDIA also notes that the Developer Intentions Survey results presented in this report and in individual UDIA State Office NHP releases do not claim to reflect 100% of the housing pipeline. In the first year of NHP reporting there was stronger survey response rates achieved in Western Australia and NSW than other jurisdictions – which will be an arena of strong focus in 2025 NHP reporting. Where possible we have drawn from the survey data to draw conclusions around required infrastructure, approvals and pipeline projections. This intelligence has been used to inform and predict the number of homes impacted by infrastructure & approvals in the forward pipeline.

We have attempted to overcome the shortfalls in our overall pipeline numbers by drawing from existing and public sources of information including government land supply monitoring programs and project scale intelligence from the Cordell Connect platform.

# About UDIA

**THE URBAN DEVELOPMENT INSTITUTE OF AUSTRALIA (UDIA) IS THE PEAK BODY REPRESENTING THE URBAN DEVELOPMENT INDUSTRY IN AUSTRALIA.**

UDIA REPRESENTS MORE THAN 2,100 COMPANIES INCLUDING DEVELOPERS AND A RANGE OF PROFESSIONALS INVOLVED IN THE DEVELOPMENT INDUSTRY INCLUDING LAWYERS, ENGINEERS, TOWN PLANNERS AND CONTRACTORS.

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