

Strategic

STAKEHOLDER
ENGAGEMENT

Housing

Learning

Discussion

City

Purpose

Document

Student

Built

Accommodation

DISCUSSION DOCUMENT
ON
STUDENT HOUSING AND
PURPOSE BUILT
STUDENT ACCOMMODATION

FOREWORD

I am pleased to present this discussion document on student housing and purpose built student accommodation on behalf of Belfast City Council and its partners on the Student Housing Joint Team¹. It follows on from the March 2012 report on *'Belfast: A Learning City - Holyland and Wider University Area Strategic Study – Independent Consultant's Report'*².

Research has shown that students studying and living within cities make a significant contribution to local and regional economies. Belfast currently has 5 Higher Education Institutions across the city and by 2018 will have 2 major University campuses close to the city centre. There is also a growing international student market which presents a significant opportunity for Belfast.

The recently published consultation draft of the Belfast City Masterplan Review highlights development of the Learning City as a key theme aimed at harnessing the value of the higher education institutions across the city to maximise their impact on the economy, vibrancy and diversity of the city and region.

Attracting students to study and live in the city not only requires excellent education providers, high quality campuses and a wide choice of quality courses but also the right city infrastructure including IT connections, transport and housing. Student housing of whatever nature needs to be attractive, high quality, safe, secure, accessible and affordable. In addition, learning from experiences of areas such as the Holyland, student housing provision needs to be planned and appropriately managed to ensure that there is a more positive integration with any existing communities.

The Holyland and Wider University Area Strategic Study report highlighted that Belfast is different to most other large university cities in that the proportion of available managed purpose built student accommodation (PBSA) is considerably lower than elsewhere in the UK. Local students also tend to live with others from their home towns and stay in their student accommodation during weekdays only. There are also lower numbers of international students, however, there is a target set to increase this figure over the next few years. This means we need a fairly unique solution.

This document seeks to advocate a vision and direction for student housing and PBSA in Belfast and is a key stage in developing a strategy for student housing in Belfast.

The document has been jointly prepared in partnership with the relevant government departments and agencies together with input from Higher Education Institutions. We welcome your views and comments on the proposals it contains to help inform the future of student housing provision in the city.

As chairman of the Strategic Policy and Resources Committee I wish to thank all the partners and stakeholders who have assisted in this work to date and to thank you in advance for any contribution you wish to make in response.

Alderman Gavin Robinson

(Chair of Strategic Policy and Resources Committee)

September 2013

¹ Belfast City Council, Department for Social Development, Department of the Environment, Northern Ireland Housing Executive, Strategic Investment Board.

² In March 2012, Belfast City Council and its partners published the *'Belfast: A Learning City – Holyland and Wider University Area Strategic Study – Independent Consultant's Report'* which outlines a range of recommendations to make Belfast a destination of choice for students and to restore the functional integrity of the Holyland. This report highlighted the need for Belfast to promote itself as a 'Learning City' to maximise the economic and regenerative benefits that this can bring to the city. This discussion document takes the aspect of student housing a stage further. The work in the Wider University Area is being considered separately.

CONTEXT FOR DISCUSSION DOCUMENT

1. This Discussion Document on student housing and purpose built student accommodation (PBSA) has been prepared in the context of:
 - the outstanding opportunity to enhance Belfast's role as a Learning City.
 - the expressed desire of the city's higher educational institutions to increase international student numbers who traditionally prefer PBSA.
 - the need to facilitate the development of PBSA in Belfast which has a lower level of PBSA than most other major university cities in the UK.
 - the proposed development of the University of Ulster campus in Belfast's Northside area and the development of the Belfast Metropolitan College's Campus in the Titanic Quarter.
 - the recommendations of the Strategic Study of the Holyland and the Wider University Area which noted the need to make Belfast a destination of choice for students through the provision of student housing and to assist in restoring the functional integrity of the Holyland.
 - the need to address issues of potential concentration of ad hoc student housing within local neighbourhoods whilst acknowledging the important role of the private rented sector in the provision of high quality student accommodation.
 - the fact that responsibilities for the student housing sector are fragmented and disjointed with no single organisation having responsibility for student housing and the development of policy or strategy.
2. The Document has been prepared by Belfast City Council on behalf of the Student Housing Joint Team which was led by Belfast City Council and comprised DoE Planning, Department for Social Development, Strategic Investment Board and the Northern Ireland Housing Executive.
3. To date, the work of the Joint Team (supported by a wider working group incorporating the Department for Employment and Learning, Queen's University Belfast and the University of Ulster) has focused on assessing the market and demand for PBSA, investigating financial models and developing a range of planning criteria that could be considered as requirements for PBSA. It is proposed that the latter will provide a basis for development of future planning policy for PBSA following the transfer of local planning powers to the City Council in 2015. In the interim, Belfast City Council and other Joint Team members will, following stakeholder consultation, utilise the criteria as they engage with the statutory planning process.

THE BELFAST LEARNING CITY CONCEPT

4. The publication '*Belfast: The Masterplan*' produced by the City Council is currently under review and in May 2013 a '*Consultation on Emerging Findings*' was published, identifying the Learning City as one of its key themes. Under this theme, Belfast's higher education institutions are recognised as important city assets which have a considerable impact upon the city and regional economy. The strategic objectives, identified in the emerging findings, are to harness the economic power of the institutions to ensure that Belfast maximises the benefits from having a number of top learning establishments close to the city centre.

5. Higher education is critical to the overall prosperity and growth of the Northern Ireland economy as the sector³:
 - generates over £1bn annually in local economic activity;
 - generates over 6,500 jobs directly and levers the same number again in the labour market;
 - contributes significantly to the skills base, through highly qualified graduates, a factor which plays a crucial role in attracting inward investment;
 - has supported £100m's of new investment and 1,000's of high value new jobs through knowledge transfer and innovative initiatives, including the highly successful NI Science Park; and
 - attracts research funding from external sources which doubles the public investment in research activity in the two universities.

6. With five higher educational campuses in the city there is a prospect of being able to pilot innovative arrangements for city centre living and the development of services, facilities, amenities, cultural infrastructure and creative enterprises that will strengthen the city centre. The city centre has traditionally been viewed as a shared, safe space and the creation of safe spaces which support student life and the integration of students in the city and community will be an important feature of a Belfast as a Learning City.

STUDENT POPULATION

7. In 2011/12 the student population in Greater Belfast was 43,385 with approximately half of all students living at home. Most of the remainder lived in the private rented accommodation (much of which is HMO accommodation) and just fewer than 4,000 live in managed accommodation. The provision of PBSA in Belfast is approximately 50% the average rate of provision in the UK.

8. There are uncertainties in trying to make student population projections due to a range of factors including changing demographics, the impact of tuition fees, competition from other universities, the growing global market for international students and the associated increased demand from international students for university places across the UK.

9. The following table provides a breakdown of higher education student numbers by institution in Belfast for 2010/11 and updated figures for 2011/12. Queen's University, with 22,895 students, has the highest number of students in Belfast followed by University of Ulster (Belfast and Jordanstown campuses) with 15,029 students.

	Total Higher Education		Total Post Graduate		Total Undergraduate*	
	2010/11	2011/12	2010/11	2011/12	2010/11	2011/12
QUB	22,706	22,985	5,497	5,120	17,209	17,865
St Mary's	879	1,020	20	145	859	875
Stranmillis	1,163	1,340	132	145	1,031	1,195
UU: Belfast & J'town	15,771	15,029	1,340	3,201	12,660	11,828
BMC	4,033	3,011	-	-	4,033	3,011
Total	44,552	43,385	6,989	8,611	35,792	34,774

* Includes full and part-time undergraduates

³ Source: Report to Department for Employment and Learning Committee, Queen's University of Belfast, March 2011.

10. Full-time undergraduates form a core market for student accommodation and their numbers by institution were as follows:

Year	QUB	Ulster (Jordanstown & Belfast)	Belfast Met	St Marys	Stranmillis
2010/11	13,354	8,830	1,842	849	831
2011/12	13,765	8,864	1,491	865	890

11. Belfast is aiming to increase its international profile and appeal and Queen's University, University of Ulster and Belfast Metropolitan College are aiming to increase their international student numbers. Belfast Metropolitan does not provide student accommodation but the predicted increase in full time courses will cater for international students who would need accommodation in the city.
12. The international student profile for the Belfast's higher education institutes for 2011/12 was as follows:

	Undergraduate	Postgraduate	Total
QUB	905	1,600	2,505
St Mary's	30	5	35
Stranmillis	40	10	50
UU (Belfast & J'town)	1,465	863	2,328
BMC	11	0	11
Total	2,451	2,478	4,929

13. The traditional markets for PBSA are international students and first year students. However, there has been a reported increase in the number of returning students applying for university managed/ provided accommodation which indicates a potential increase in demand.
14. There are just fewer than 4,000 managed bed spaces in Greater Belfast for a total student population, in 2011/12, of 43,385. The majority are provided by Queen's University which owns and manages 2,243 bed spaces in and around the university area. It also markets and promotes a further 173 bed spaces at other managed halls and a further 269 bed spaces elsewhere. The University of Ulster provides 878 bed spaces at the Jordanstown campus. The Jordanstown campus accounts for 92% of non-UK domicile students at the University of Ulster. Stranmillis College provides 465 bed spaces at its campus.

University/College	Address	No. Bed spaces 2012/2013
Queen's University (owned and managed accommodation)	Elms Village, 78 Malone Road	1,633
	Willow Walk (new)	257
	Mount Charles	157
	Grant House, 64 Malone Rd	50
	76 Malone Rd	14
	College Gardens	45
	Guthrie House Fitzwilliam	87
	Sub-total	2,243
Queen's University (marketed and promoted accommodation)	Church of Ireland & Methodist Chaplaincies	49
	Derryvolgie Hall	88
	Union Theological College	26
	Edgehill Theological College	10
Sub-total	2,416	
University of Ulster – Jordanstown Campus	Jordanstown Campus	708
	Jordanstown Head-lease scheme	170
Sub-total	878	
Stranmillis College	Stranmillis University College Campus	465
	Sub-total	465
Total		3,759
Total (exc Jordanstown)		2,881

* Queen's University market and promote a further 269 bed spaces in addition to those noted in the table.

15. There is over-demand for accommodation for Queen's University owned/managed accommodation, with applications for Queen's University accommodation also made by students attending other educational institutions. The ability for QUB to accommodate non-Queen's students has declined over the past 3 years due to increasing demand from Queen's students. Occupancy levels are high for University of Ulster (90-100%) and Queen's University owned/managed accommodation (100%). Stranmillis has also reported high occupancy levels in 2012.
16. The Strategic Study of the Holyland and Wider University Area notes that Belfast differs from many other university cities in that there has been a preference among first year students for privately rented accommodation instead of university accommodation. In a May 2010 IPSOS Mori and Students Union survey of students living in the Holyland (based on 213 face-to-face interviews), 46% of students surveyed were first year students.
17. The reasons for the preference for private rented accommodation may be affordability, proximity to social activities and nightlife and being close to other students. Students like to live with other students they already know who are attending different education institutions but also because they like the freedom they get from living off campus.

18. Queen's University has a projected demand of an additional 900 bed spaces of student accommodation by 2015. The University of Ulster has no plans to increase student numbers in the Belfast area before 2015. By 2018, it expects over 15,000 students and staff will be at the new Belfast campus development.
19. In relation to the demand and market for student accommodation it is considered that:
 - there is unlikely to be any decline in student numbers and the increase is likely to be incremental;
 - there is limited availability of PBSA in Belfast;
 - there is a need for PBSA as evidenced by the Strategic Study report and reports of increasing year-on-year demand for accommodation at QUB managed facilities;
 - the key market groups for PBSA are international students and first year undergraduates;
 - the key 'selling points' of PBSA relate to security and safety, the ease of paying and the clarity of costs for the accommodation and related services; and
 - there remains an important role for privately rented / HMO accommodation in response to the preference of first year and returning students.

POLICY CONTEXT

20. The provision of housing for students is consistent with the priorities identified in the Northern Ireland Executive's Programme for Government, the strategic guidelines contained in the Regional Development Strategy 2035, the DSD Regeneration Policy Statement for Belfast City Centre and the Belfast City Council Masterplan.
21. There is no specific Use Class within the Planning (Use Classes) Order (NI) 2003 for student housing. As such, housing which may be occupied by students, but which is not HMO accommodation, is subject to normal residential planning policy considerations. In relation to the regulation of HMOs, the Department for Social Development and the Northern Ireland Housing Executive have undertaken a fundamental review of HMO regulation and it is proposed that legislative proposals will be brought forward in due course.
22. Proposals for HMOs in the Belfast City Council area are assessed against the policies of the HMO Subject Plan which provides an area-based planning policy for HMOs. It identifies 22 HMO Policy Areas, within which permission will only be granted for HMOs where the number of HMOs will not as a result exceed 30% of all dwelling units. Only 2 of the 22 areas identified were under 30% HMOs at the time of subject plan's publication. In addition, 18 HMO Development Nodes were identified where planning permission for HMOs will be granted. Outside HMO Policy Areas and Development Nodes HMO development will only be granted where it would not exceed 10% of dwellings on the road or street.
23. The HMO Subject Plan also contains a specific PBSA policy, namely Policy HMO 7 '*Large Scale Purpose Built Student Accommodation*'. Proposals comprising 50 units or 200 occupants or more will be granted planning permission subject to compliance when assessed against 5 criteria contained within the policy, namely:
 - *Development of any complex consists of a minimum of 50 units or a minimum of 200 occupants. This will not preclude proposals for smaller incremental extensions or consolidations of existing halls of residence and phased development of larger schemes;*

- *All units are self-contained (i.e. having a bathroom, w.c. and kitchen available for use by the occupiers);*
 - *The location is not within a primarily residential area;*
 - *Provision is made for management of all accommodation. This may require an Article 40 agreement with Planning Service;*
 - *Landscaping and amenity space is provided in accordance with a landscaping plan indicating all landscaping proposals for the scheme and, where relevant, making provision for future maintenance.*
24. Article 40 of the Planning (Northern Ireland) Order 1991 also permits the Department to enter in legal agreements with any person who has an estate in land for the purpose of facilitating, regulating and restricting the development or use of land. The possible use of such an agreement is noted in relation to Policy HMO 7.

CASE STUDIES

25. University cities have developed a range of PBSA planning policies to address the matter of purpose-built student accommodation. The policies address a range of issues including strategic context, need, funding, location, management, design quality, impact and planning controls. The two key objectives of policies tend to be firstly, to maximise the benefits of PBSA (e.g. supporting a city's knowledge economy) and secondly, avoid or minimise adverse effects (e.g. adverse effects on existing communities).
26. The following strategic observations can be made about the context for and approaches to the provision of PBSA in the university cities namely:
- (i) the range of significant potential benefits provided by quality PBSA in the right locations including supporting economic regeneration or the regeneration of sites;
 - (ii) the range of potential disbenefits of student accommodation including adverse impact on residential areas, loss of family housing and cost of street based services;
 - (iii) the value of a criteria-based approach to assessing PBSA proposals which provides flexibility and is appropriate to the particular circumstances of the university city;
 - (iv) the importance of proximity in relation to university campuses as a planning policy criterion for PBSA; and
 - (v) the value of a strategic approach which is grounded in evidence (e.g. supply and demand/need figures) and capable of facilitating delivery of quality PBSA in the right locations.

CRITERIA FOR ASSESSING PROPOSALS FOR NEW PURPOSE BUILT STUDENT ACCOMMODATION

27. The Strategic Study for the Holyland and Wider University Area noted the key role that planning will have in shaping the future development of the city in terms of accommodating students and maximising the benefits of the Learning City concept. One of the recommended actions from the Strategic Study was the development of a new criteria based policy for assessing applications for the provision of managed student housing.
28. Policy HMO 7 Large Scale Purpose Built Student Accommodation is the only current planning policy which explicitly relates to the provision of purpose built student accommodation.

29. It is considered that a new criteria based planning policy for assessing applications for the provision of managed student housing could be based upon the following:

Planning permission for purpose built student accommodation will only be granted where the following criteria are met:

- *Proximity: the development is within 15 minutes walking distance of a university/college campus or on a high frequency public transport route.*
- *Design: the nature and scale of the development is appropriate to its context, the design and layout of the development is of high quality and all units are self-contained (i.e. having a bathroom, w.c. and kitchen available for use by the occupants).*
- *Management: an appropriate Management Plan is in place to minimise potential negative impacts from occupants and the development on surrounding properties and neighbourhoods and to create a positive and safe living environment for students.*
- *Impact: the proposed development, when considered with existing and approved student accommodation development, would not result in an unacceptable impact upon surrounding residential amenity.*
- *Need: the development meets an identified need for the type of accommodation proposed.*

30. The following explanatory text would be provided with the 5 criteria:

- *Proximity: this criterion seeks to promote sustainable means of travel and minimise car use. Applications should be accompanied by information on the suitability of the location of the proposal. The fifteen minutes (or 1,200m) walking time could rise with the availability of good quality pedestrian and cycle routes. If reliant on public transport, the PBSA must be on a high frequency public transport route.*
- *Design: this criterion seeks to promote quality in design. Applications should be accompanied by a Design Statement containing site appraisal and concept design and a statement explaining the relationship of the proposal to the surrounding context. Proposals should not result in unacceptable damage to local character, environmental quality or residential amenity.*
- *Management: this criterion seeks to promote well managed PBSA proposals whilst reducing the risk of adverse impacts upon residential amenity. Applications should be accompanied by a Management Plan addressing, inter alia, general management operations, site and landscape maintenance, servicing, security features, CCTV, lighting, intercoms, soundproofing, noise control and tenant behaviour as well as providing a travel plan for staff and students.*
- *Impact: this criterion seeks to promote and capture the positive impacts of PBSA and student populations whilst reducing the risk of adverse impacts upon residential amenity. Applications should be accompanied by information on existing and approved student accommodation and the impact of the proposal upon demographics and local facilities/ service provision in an area. Information on the (social, economic and environmental) benefits of proposals, as well as any mitigation measures, should also be provided.*
- *Need: this criterion seeks to ensure student housing needs are met. Applications should be accompanied by evidence, as appropriate, of the specific need that is being addressed, why this need is currently unmet, the type of existing accommodation the potential student occupiers are likely to be drawn from and any recorded increase in student numbers. Evidence such as university support, waiting lists and bank funding may be helpful in demonstrating need.*

The explanatory text is subsidiary to and should not distort the meaning of the policy. Planning applications for PBSA should be accompanied by appropriate information which satisfies the 5 planning criteria. Other non-residential uses in PBSA schemes, e.g. retail, gyms and restaurants, will be considered against prevailing regional planning policy.

DELIVERY AND MANAGEMENT OF PBSA

31. The identification of planning criteria for PBSA provides a planning tool to inform the preparation of proposals, assess planning applications and regulate land use in the public interest. However, planning criteria in themselves will not ensure the delivery of quality PBSA which depends on a number of factors including:
 - (i) the need/demand for PBSA;
 - (ii) the availability of suitable locations/sites for PBSA;
 - (iii) the viability of individual schemes including the availability of funding;
 - (iv) planning and technical approvals for the particular PBSA scheme; and
 - (v) student management and property maintenance arrangements.
32. It is considered that a significant constraint, with respect to the provision of PBSA, is financial viability due, inter alia, to the absence of a developed private PBSA market and the rents offered by the private rented sector. Research has been undertaken to assess potential forecasted investment returns for various funding models. Indications are that significant public sector investment or support may be required perhaps in the form of occupancy guarantees and financial assistance. Discussions are ongoing in relation to if and how this could be made possible.
33. There are a number of current planning applications for PBSA, other speculative PBSA proposals are being considered by private developers and a wide range of existing planning approvals for residential accommodation within the city could be utilised for student accommodation.
34. In addition the DSD has invited developer responses to the *'Northside Development Brief'* which identifies 10 potential development sites. The DSD booklet notes that developers may seek to incorporate an element of *'student living'* within proposals for the Press/Library Quarter in Northside, highlights the need to ensure that a balanced and mixed-community is not prejudiced and states that any proposal should be supported by a recognised managing agent or landlord with a successful track record of managing student living within a city centre environment.

NEXT STEPS

35. As already noted, no single organisation has the responsibility for the delivery of PBSA. In light of the need for and benefits of PBSA, it is considered that each Department has a role to play in securing the delivery of high quality PBSA. The next steps to be taken forward by the relevant agencies of the Student Housing Joint Team include:
 - Progress with ongoing regeneration work (including Northside Developer Brief and Shaftesbury Square Development Framework);
 - Further work on developing a revised planning policy for PBSA and improved pre-application discussion guidance processes for planning applications;

- Progress with legislative proposals following the fundamental review of HMO regulation in Northern Ireland;
 - Further work on understanding financial viability and exploring options for facilitating and, if necessary, assessing the private sector or partnership delivery of PBSA schemes;
 - Belfast City Council to consult on this document and consider adopting the proposed criteria for PBSA proposals so that they can be treated as material to planning considerations.
36. Belfast City Council and its partners on the Student Housing Joint Team are committed to promoting equality and good relations and to improving the quality of life for everyone in the city. Actions taken forward will be equality screened as these are progressed and outcomes are identified.

YOUR VIEWS

37. The Joint Team would welcome your views on the Discussion Document and in particular your responses to the following questions:
1. Do you agree that the city should promote the value of students to Belfast and grow its potential as a destination of choice for students to study and live?

Specify reasons:
 2. Having regard to question 1, do you agree that the current range and choice of available student accommodation within the city could be improved to allow Belfast to realise its potential as a Learning City?

Specify reasons:
 3. Do you agree that there is a need and demand for more managed PBSA within the City?

Specify reasons:
 4. Do you agree that the five proposed planning criteria for PBSA are appropriate?

Specify reasons:
 5. Noting the next steps, what more do you think the public and private sectors should do to provide better managed accommodation for students and to promote Belfast as a destination of choice for students?

Specify reasons:

