

Contents

- 1. Introduction.....1**

- 2. Methodology2**

- 3. Summary Tables and Graphs3**
 - 3.1 Settlement Summary.....3
 - 3.2 Urban Footprint Summary5
 - 3.3 Land Use Zoning Summary6

- Appendix A: Summary Methodology.....13**

1. Introduction

As part of the preparation of a new Local Development Plan (LDP) for Belfast, the Strategic Planning Policy Statement (SPPS) for NI (September 2015) outlines a 'plan, monitor and manage' approach to ensure that, as a minimum, a 5 year supply of land for housing is maintained. It states that monitoring should be an ongoing process with annual reporting and review. As a minimum, it states that monitoring must include:

- The housing land supply at the beginning and end of the annual reporting period;
- The number of net additional units built during the annual reporting period; and
- The number of net additional housing units built in the period since adoption of the local plan.

The primary purpose of the Housing Land Availability Monitor's (referred to as the 'Housing Monitor') is to inform the formulation of the Council's new LDP. However, it will also help the Council identify where a shortfall in potential land supply might exist and can inform house-builders on the availability of land that may be suitable for housing.

The information collated will allow a clear view of the overall progress in meeting the housing objectives of the existing development plan and in identifying issues likely to require intervention. For example, a need to release phased housing sites in order to maintain a 5 year supply of available housing land, or the release of a site providing for a particular housing need.

The Planning Act (NI) 2011 requires Belfast City Council to make an annual report to the Department for Infrastructure outlining the extent to which the objectives set out in the LDP are being achieved. As the Council are currently preparing the first new LDP for Belfast under this new legislation, the production of Annual Monitoring Reports has not yet commenced. Instead, annual Housing Monitor reports are being published by the Council until the new LDP is adopted.

2. Methodology

The Housing Land Availability Monitor (the “Monitor”) measures net gains in housing within the Belfast City Council boundary. It provides a snapshot of the amount of land available for new homes as of 1st April each year. The process followed to produce the Annual Housing Monitor is summarised at Appendix A.

The Monitor presents a register of potential housing land, based on current planning policy designations¹ and planning permissions, rather than an accurate picture of viable housing land. It is the role of an Urban Capacity Study (UCS), which will be undertaken from time to time, to assess the suitability, availability and achievability of monitored sites to contribute to a viable supply of land. The most recent UCS² was completed in March 2018 and, although new sites identified are not included in the Monitor, the outcomes are summarised within the 2017/2018 Belfast Housing Land Availability Summary Report.

¹ *For the purposes of the Housing Land Availability Monitor, the draft Belfast Metropolitan Area Plan (BMAP) 2015 is utilised rather than the former Belfast Urban Area Plan (BUAP) 2001. The adopted BMAP was quashed as a result of a judgement in the Court of Appeal delivered on 18 May 2017 and, although this means the BUAP is now the statutory development plan for the area, the draft BMAP, in its most recent, pre-examination, form remains a significant material consideration in future planning decisions. Draft BMAP therefore refers to that which was purported to be adopted and not the pre-examination draft published in 2004.*

² [Belfast City Council Urban Capacity Study – Final, 20 March 2018](https://bit.ly/2W0nACv) or <https://bit.ly/2W0nACv>

3. Summary Tables and Graphs

The following summary tables detail the supply of housing for the Belfast district from 1 April 2018 to 31 March 2019 and provide a snapshot of the land remaining for housing and its associated potential capacity to accommodate new homes. Cumulative totals are also provided since the Council's housing monitor was established – i.e. 1 April 2015, the date at which the Council gained statutory responsibility for planning.

It should be noted that these cumulative totals will reflect the total since the Council gained statutory responsibility for planning until such time as an up-to-date Local Development Plan for the new district is adopted, establishing appropriate targets to monitor delivery against.

3.1 Settlement Summary

Table 1 provides a breakdown of the housing supply, land availability and capacity for future housing units for each Settlement within the District, including Belfast City and the Small Settlements of Edenderry, Hannahstown and Loughview.

Belfast City is then further sub-divided into a number of settlement areas or sectors based on key designations within the prevailing development plan. These areas include Belfast City Centre, the Belfast Harbour Estate and Outer Belfast, which is defined as the area covered by the Settlement Limit of Belfast City outside of the City Centre and Harbour Area.

The data within the table is divided into the following columns:

- **Area Developed 1 April 2018 to 31 March 2019** – the area of land in hectares (ha) developed during the current monitor year;
- **Area Developed 1 April 2015 to 31 March 2019** – the cumulative area of land in hectares (ha) developed to date from 1 April 2015 (the date at which the Council gained statutory responsibility for planning);
- **Units Complete 1 April 2018 to 31 March 2019** – the number of dwellings completed during the current monitor year;

- **Units Complete 1 April 2015 to 31 March 2019** – the cumulative total number of dwellings completed to date from 1 April 2015 (the date at which the Council gained statutory responsibility for planning);
- **Available Potential (Hectares)** – the area of land estimated as available for additional dwelling completions within monitored sites as at 1 April 2019; and
- **Available Potential (Dwelling Units)** – the estimated number of dwellings that could be accommodated on the available potential land as at 1 April 2019.

During the 2018/19 monitoring year 830 units were completed on 20.9 ha of land across the District. 398.6 ha of land remains, with potential capacity for 22,074 units. Within Belfast City, 731 units completed were within Outer Belfast, with a further 99 units completed within the City Centre. 13,652 of the available potential units are within Outer Belfast, whilst 5,268 and 3,150 potential dwelling units remain in the City Centre and Harbour Area respectively. There were no further completions in any of the other settlements and a total of 4 available potential units remain across Hannahstown and Loughview.

Figure 1 shows the total dwellings completed for the district from 2015/16 to present, to allow for an analysis of trends over a longer timeframe. The total number of dwellings completed in the district has increased by 25.9% from 659 in 2017/18 to 830 in the current monitor year.

3.2 Urban Footprint Summary

Table 2 provides a breakdown of the housing supply, land availability and capacity for future housing units within Belfast City, further categorised into land within the identified 'Urban Footprint'³ or Greenfield land. This only refers to Belfast City, given that the Urban Footprint is only defined in relation to settlements with a population greater than 5,000 people. This excludes Belfast's three Small Settlements.

In addition to the columns as described in Table 1 above, the **Units within the Urban Footprint (%)** row calculates the proportion of dwellings completed within the Urban

³ The Urban Footprint is defined within the Regional Development Strategy 2035 as "the continuous built-up area of the settlement". The Urban Footprint boundary was updated as part of the UCS (March, 2018) as explained in the 2017/2018 Belfast Housing Land Availability Summary Report. The 2018 Urban Footprint forms a revised baseline position for the 2017/2018 monitor period onwards.

Footprint during the current monitor year and the cumulative total number of dwellings completed to date from 1 April 2015 (the date at which the Council gained statutory responsibility for planning), expressed as a percentage of the total number of dwellings completed over the respective time periods.

84.1% of the 830 units completed within Belfast City were built on land within the Urban Footprint. Of the remaining potential dwelling units, 92.9% are within the Urban Footprint.

Figure 2 shows the proportion of dwellings within the Urban Footprint for the district from 2015/16 to present, to allow for an analysis of trends over a longer timeframe. The proportion of dwellings completed within the Urban Footprint has risen from 82.1% in 2017/18 to 84.1% in the current monitor year.

3.3 Land Use Zoning Summary

Table 3 provides a breakdown of the dwelling units completed broken down by the type of land use zoning within the prevailing development plan within each settlement or settlement area. The data within this table is divided into the following columns:

- **Land Zoned for Housing** – the number of units completed and the remaining potential units on land allocated for residential use within the prevailing development plan;
- **Land Zoned for Mixed Use** – the number of units completed and the remaining potential units on land zoned for mixed use development, which includes an element of residential development within key site requirements;
- **All other land** – the number of units completed and the remaining potential units on any other land not falling within the first two, which include non-zoned land and land zoned for non-residential uses; and
- **Proportion of Zoned Land (%)** – the proportion of units completed on both housing or mixed use zoned land expressed as a percentage of the total number of dwellings completed.

25.8% of the dwelling units completed during 2018/19 have been delivered on zoned land within Belfast City. The number of units completed on all other land was 616 dwellings.

Figure 3 shows the proportion of units completed for the district on both housing or mixed use zoned land expressed as a percentage of the total number of dwellings completed from 2015/16 to present. This proportion has decreased from 28.0% in 2017/18 to 25.8% in the current monitor year. Figure 4 shows the total number of units completed on all other land. This 'windfall' provision has increased by 40.6% from 438 units in 2017/18 to 616 in the current monitor year.

Table 4 provides the capacity for future dwelling units on the same basis as Table 3. Of the remaining potential available for future dwellings, 39.1% is currently zoned for housing or mixed use. 4,515 of the available 22,074 potential dwelling units can be delivered on land zoned for housing and 4,125 units on land zoned for mixed use. In comparison, 13,434 of the remaining potential units can be provided on all other land.

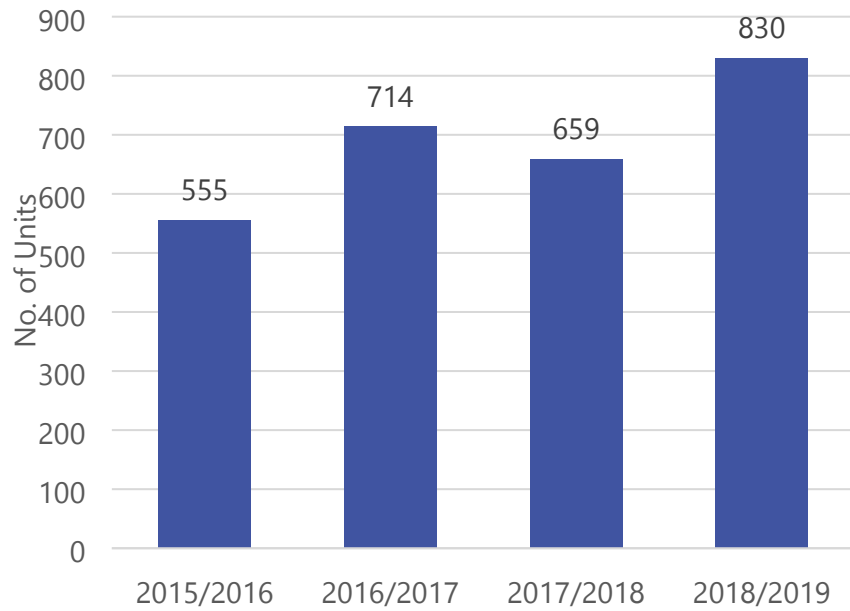
Table 1: Settlement Summary 2018/19

Settlement	Area Developed (Hectares)		Units Complete		Available Potential (Hectares)	Available Potential (Dwelling Units)
	01-04-18 to 31-03-19	01-04-15 to 31-03-19	01-04-18 to 31-03-19	01-04-15 to 31-03-19		
Belfast City						
Outer Belfast	20.5	73.1	731	2,535	275.5	13,652
City Centre	0.4	1.7	99	202	36.5	5,268
Harbour Area	0	0	0	0	86.1	3,150
Belfast City Total	20.9	74.8	830	2,737	398.1	22,070
Small Settlements						
Edenderry	0	0	0	0	0	0
Hannahstown	0	0.8	0	21	0.3	3
Loughview	0	0	0	0	0.2	1
Small Settlement Total	0	0.8	0	21	0.5	4
DISTRICT TOTAL	20.9	75.6	830	2,758	398.6	22,074

Table 2: Urban Footprint Summary 2018/19

Settlement / Area	Area Developed (Hectares)		Units Complete		Available Potential (Hectares)	Available Potential (Dwelling Units)
	01-04-18 to 31-03-19	01-04-15 to 31-03-19	01-04-18 to 31-03-19	01-04-15 to 31-03-19		
Urban Footprint	14.5	56.6	698	2,384	337.0	20,511
<i>Units within the Urban Footprint (%)</i>	-	-	<i>84.1%</i>	<i>87.1%</i>	-	<i>92.9%</i>
Greenfield	6.4	18.2	132	353	61.1	1,559
Belfast City Total	20.9	74.8	830	2,737	398.1	22,070

**Figure 1: Total Dwellings Completed
2015-2019**



**Figure 2: Proportion of Dwellings Within the Urban Footprint
2015-2019**

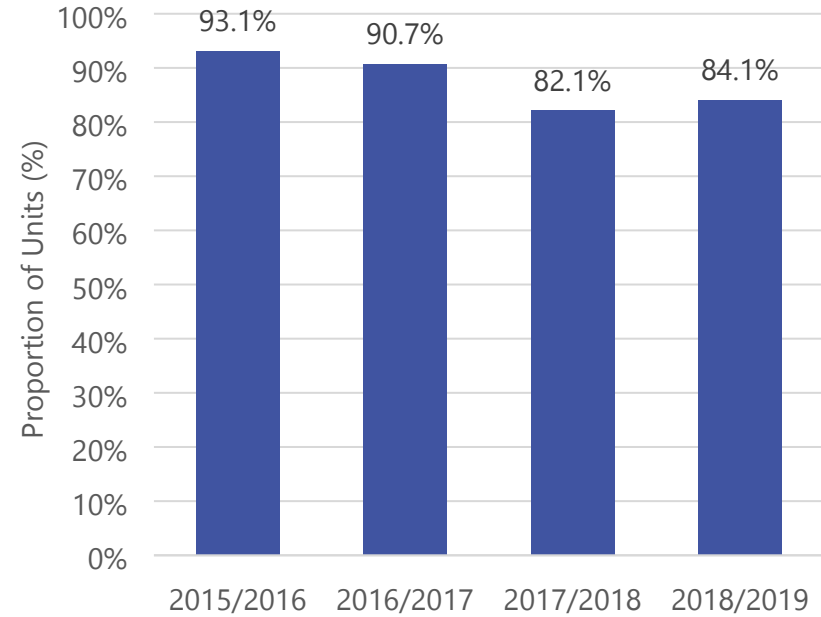
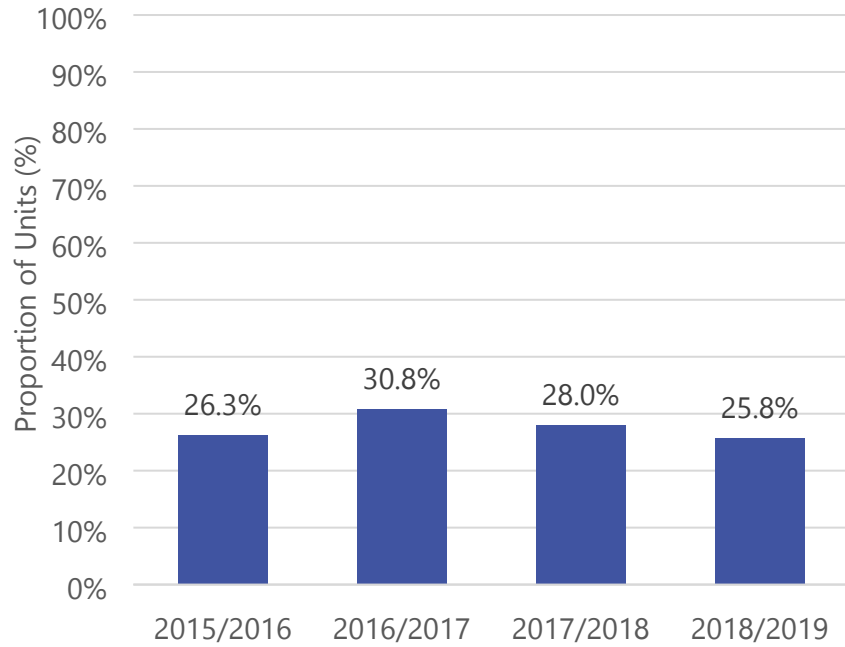


Table 3: Land Use Zoning Completed Units 2018/19

Settlement / Area	Units Complete									
	Land Zoned for Housing		Land Zoned for Mixed Use		All other land		Total		Proportion on Zoned Land (%)	
	01-04-18 to 31-03-19	01-04-15 to 31-03-19	01-04-18 to 31-03-19	01-04-15 to 31-03-19	01-04-18 to 31-03-19	01-04-15 to 31-03-19	01-04-18 to 31-03-19	01-04-15 to 31-03-19	01-04-18 to 31-03-19	01-04-15 to 31-03-19
Belfast										
Outer Belfast	214	725	0	60	517	1,750	731	2,535	29.3%	31.0%
City Centre	0	4	n/a	n/a	99	198	99	202	0.0%	2.0%
Harbour Area	n/a	n/a	0	0	0	0	0	0	n/a	n/a
Belfast Total	214	729	0	60	616	1,948	830	2,737	25.8%	28.8%
Small Settlements										
Edenderry	n/a	n/a	n/a	n/a	0	0	0	0	n/a	n/a
Hannahstown	n/a	n/a	n/a	n/a	0	21	0	21	n/a	0.0%
Loughview	n/a	n/a	n/a	n/a	0	0	0	0	n/a	n/a
Small Settlement Total	n/a	n/a	n/a	n/a	0	21	0	21	0.0%	0.0%
DISTRICT TOTAL	214	729	0	60	616	1,969	830	2,758	25.8%	28.6%

**Figure 3: Proportion of Units Complete on Zoned land
2015-2019**



**Figure 4: No. of Units Complete on All Other Land
2015-2019**

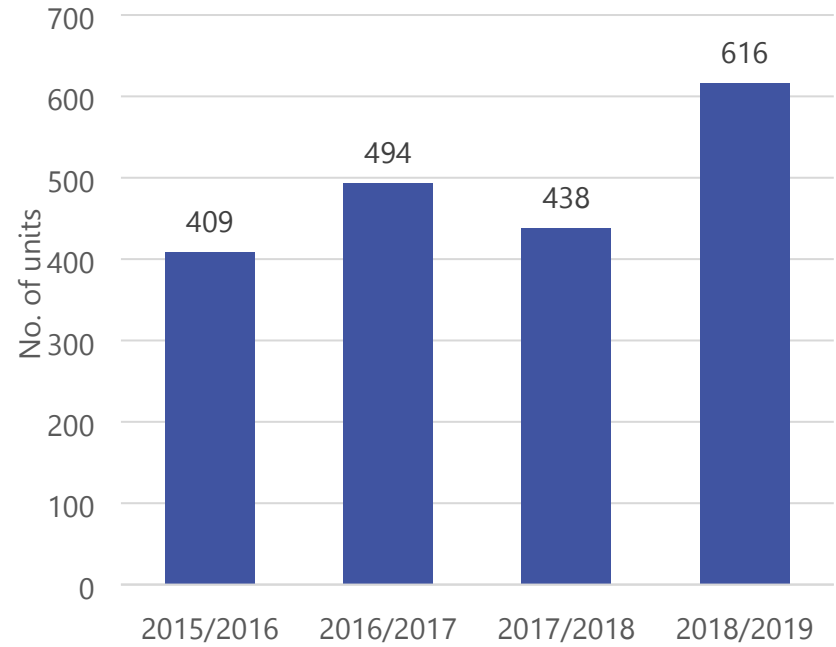


Table 4: Land Use Zoning Remaining Potential Units 2018/19

Settlement / Area	Remaining Potential Units				
	Land Zoned for Housing	Land Zoned for Mixed Use	All other land	Total	Proportion on Zoned Land (%)
Belfast City					
Outer Belfast	3,763	1,100	8,789	13,652	35.6%
City Centre	752	n/a	4,516	5,268	14.3%
Harbour Area	n/a	3,025	125	3,150	96.0%
Belfast City Total	4,515	4,125	13,430	22,070	39.1%
Small Settlements					
Edenderry	n/a	n/a	0	0	n/a
Hannahstown	n/a	n/a	3	3	0.0%
Loughview	n/a	n/a	1	1	0.0%
Small Settlement Total	n/a	n/a	4	4	0.0%
DISTRICT TOTAL	4,515	4,125	13,434	22,074	39.1%

Appendix A: Summary Methodology

The Housing Land Availability Monitor measures net gains in housing within the Belfast City Council area. It provides a snapshot of the amount of land available for new homes as of 1st April each year. The Monitor demonstrates the presence of an adequate and continuous supply of housing land in the city and provides evidence to inform the preparation of the Local Development Plan and to make planning decisions.

The Monitor presents a register of potential housing land, based on current planning policy designations and planning permissions, rather than an accurate picture of viable housing land. An Urban Capacity Study will be undertaken from time to time to assess the suitability, availability and achievability of monitored sites to contribute to a viable 5 year supply of land. An Urban Capacity Study for Belfast was published in March 2018.

