

NATIONAL STUDENT ACCOMMODATION STRATEGY



FOREWORD



We are pleased to introduce the first ever National Student Accommodation Strategy for Ireland's higher education sector. This Strategy is an important action in the Government's overall plan to accelerate housing supply.

The increase in the number of students participating in higher education is creating unprecedented demand for suitable, affordable student accommodation.

Rebuilding Ireland set a target to bring on-stream an additional 7,000 purpose built student accommodation bed spaces by 2019. We are already making progress towards this target: 1,117 bed spaces have been completed since the launch of *Rebuilding Ireland* and a further 5,000 are currently under construction. Planning permission has been granted for almost 2,000 bed spaces and planning applications are lodged for a further 3,500. This means that in excess of 10,000 additional bed spaces could be delivered by 2019. In total, there is potential for at least an additional 21,000 purpose built student accommodation bed spaces by 2024.

The Department of Education and Skills supported the USI #homesforstudy campaign in 2016/17 and this campaign resulted in 2,478 students taking up "digs" accommodation in private family homes. Building on this success we want to increase the number of students taking up Digs accommodation to around 4,000 per year by 2019. This would be an increase of 1,500 per annum compared to 2016. In Budget 2017, the ceiling for exemption from income tax under the Rent-a-Room scheme was increased from €12,000 to €14,000 for 2017 and subsequent years. This is a win-win initiative for students and home owners.

There are also actions in the Strategy aimed at ensuring that higher education institutions, students and managers of purpose built student accommodation work together to ensure that students are integrated into and enhance the communities where their accommodation is located.

This ambitious strategy will not only benefit students through boosting supply of purpose built student accommodation, but will have additional economic benefits, both in the creation of employment in the construction sector and through expenditure by the students and their families in the local economy. Working with our key stakeholders, public and private, we are focussed on building upon the projected delivery of student accommodation and key actions set out in this Strategy, to ensure that the supply of purpose built student accommodation is delivered in the short, medium and long-term, to 2024 and beyond.

Minister Richard Bruton, TD
Minister for Education and Skills

Minister Mary Mitchell O'Connor, TD
Minister of State for Higher Education

FOREWORD



I am delighted to welcome the publication of the *National Student Accommodation Strategy* as an important step in the efforts to develop this significant segment of the overall housing sector.

The Government's housing strategy, *Rebuilding Ireland: Action Plan For Housing and Homelessness*, identifies the important contribution that increased student accommodation provision can make to resolving the overall housing undersupply problem.

Rebuilding Ireland builds on the close cooperation of my Department with the Department of Education and Skills on the issue of student accommodation over a number of years including through the Inter-Departmental Working Group on Student Accommodation. Many of the issues raised at the Working Group forum translated into specific actions of the *Rebuilding Ireland* strategy aimed at supporting the development of new purpose-built student accommodation nationally.

Recent legislative innovations designed to assist student accommodation projects were provided for in the Planning and Development (Housing) and Residential Tenancies Act 2016. These included the fast tracking of planning applications for construction projects >200 bedspaces to An Bord Pleanála and the availability of financing from the Housing Finance Agency to the Higher Education Institutes for new student accommodation projects.

I look forward to an expanded and improved student accommodation sector capable of meeting the needs of our growing third level population into the future.

Damien English T.D.

Minister of State for Housing and Urban Development
Department of Housing, Planning & Local Government.

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DCU:	Dublin City University
DES:	Department of Education and Skills
DHPCLG:	Department of Housing, Planning, Community and Local Government
DIT:	Dublin Institute of Technology
DPER:	Department of Public Expenditure and Reform
EIB:	European Investment Bank
HEA:	Higher Education Authority
HEI:	Higher Education Institution
HFA:	Housing Finance Agency
IoT:	Institute of Technology
ISIF:	Ireland Strategic Investment Fund
IUA:	Irish Universities Association
MU:	Maynooth University
NAMA:	National Asset Management Agency
NTMA:	National Treasury Management Agency
NUIG:	National University of Ireland Galway
PBSA:	Purpose Built Student Accommodation
TCD:	Trinity College Dublin
THEA:	Technological Higher Education Association
UCC:	University College Cork
UCD:	University College Dublin
UL:	University of Limerick
USI:	Union of Students' in Ireland

The National Student Accommodation Strategy is designed to ensure that there is an increased level of supply of purpose built student accommodation (PBSA) to reduce the demand for accommodation in the private rental sector by both domestic and international students attending our Higher Education Institutions (HEIs).

THE NATIONAL STUDENT ACCOMMODATION STRATEGY IS DESIGNED TO ENSURE THAT THERE IS AN INCREASED LEVEL OF SUPPLY OF PURPOSE BUILT STUDENT ACCOMMODATION

Particular measures of success will include full delivery of the following eight key targets:

1. Construction of at least an additional 7,000 PBSA bed spaces by end 2019. This is in line with the target set in Rebuilding Ireland.
2. Construction of at least an additional 21,000 PBSA bed spaces places by 2024 over the baseline figure of 33,441 PBSA bed spaces which are currently available.
3. To increase the number of students taking up Digs accommodation to around 4,000 per year by 2019. This would be an increase of 1,500 per annum compared to 2016.
4. Production of a Quarterly Reporting document which will track both public (HEI) and private developments of PBSA in Ireland and will be utilised to monitor the progress made in relation to the targets outlined in

this Strategy. Bed-spaces will be used as the metric to describe and measure the scale of PBSA development. This will ensure that we have a clear outline of the future pipeline of PBSA developments coming on-stream which will help to inform policy development in this area into the future.

5. A significant increase in the quantum of bed spaces available to HEIs via nomination agreements from the current stated level of 300 per annum. This will require the development of relationships and nomination agreements between private providers of PBSA and HEIs to increase the availability of good quality PBSA for students attending HEIs. This will be an added attraction for marketing HEIs as a location of choice for students both nationally and internationally.

6. HEIs will ensure that their accommodation offices/officers are in a position to provide specific information on sourcing accommodation to both existing, incoming and prospective students to alleviate the difficulty for students (particularly first year students) in accessing accommodation.
7. USI, local Students' Unions and HEIs will work together to highlight the potential for regeneration, community involvement, civic activities and engagement that arises from having an accommodation mix in an area that includes a significant proportion of Student Accommodation including PBSA.
8. HEIs will continue and enhance the practice of volunteering by students and staff members in local community engagement and community based projects. HEIs will continue to highlight to their students the importance of promoting respect for the local community.

*Rebuilding Ireland*¹ highlighted the need for continuing research and analysis on student accommodation in Ireland to ensure that an enhanced level of supply of PBSA is available to meet future demand. Action 4.7 of *Rebuilding Ireland* outlined that the Department of Education and Skills would

“prepare and publish a national student accommodation strategy, which will set out a broad framework for delivery of an enhanced level of accommodation and which will inform local authority housing strategies and the land management process in general, in order to provide suitably located and affordable sites.”

This Strategy also builds upon the HEA report², *Student Accommodation: Demand & Supply*, which was published in 2015 by the Minister for Education and Skills.

Housing for students is a specific and important segment of the overall housing sector with distinct characteristics and requirements. This has a significant related impact on the private rental sector and an increase in the provision of student accommodation is a key priority in addressing the housing crisis. There are a significant number of students renting from private landlords in Ireland as was highlighted in the National Economic and Social Council (NESC) Report “Ireland’s Rental Sector: Pathways to Secure Occupancy and Affordable

Supply”³ which was published in May 2015. The NESC report also outlined that on average, there are 2.73 persons per household in Ireland. While it is likely that the occupancy of a household comprising solely of students is going to be higher than the national average, it is a fair extrapolation to make that every 4 students housed in either PBSA or in Digs will free up an additional housing unit in the private rented sector that would otherwise have been occupied by students. The impact of an additional 21,000 student accommodation bed spaces, in addition to an additional 1,500 Digs spaces, will free up at least an additional 5,000 rental units for the wider residential rental sector.

¹ <http://www.education.ie/en/Publications/Education-Reports/Report-on-Student-Accommodation-Demand-and-Supply.pdf>

² http://files.nesc.ie/nesc_reports/en/141_Irelands_Rental_Sector_MainReport.pdf

³ http://files.nesc.ie/nesc_reports/en/141_Irelands_Rental_Sector_MainReport.pdf

Demand for Higher Education Places

As outlined in the Expert Group Report on Future Funding for Higher Education, *Investing in National Ambition*⁴, higher education has made a hugely positive contribution to Ireland's development in recent decades and has proved to be a game changer for individuals, employers, society and for the State. Its role is as important now as ever as we seek to further develop our skills infrastructure, deepen our innovative capacities and create a more equal society.

The significant increase in demand for higher education places over the past decade is projected to continue beyond the mid-2020s. This has had a very positive impact on Irish economic performance through the supply of well-educated and skilled graduates to meet the demand of the labour market. However, this increase in student numbers, including international students, is creating an unprecedented demand for suitable, affordable student accommodation.

Research has shown that, students and HEIs make a significant positive contribution to their city, their region and the broader economy. For example, a recent study conducted by UCD⁵ concluded that the economic output generated by UCD and its students was €1.3 Billion per annum. This included €448 Million generated directly from UCD students.

⁴ <https://www.education.ie/en/Publications/Policy-Reports/Investing-in-National-Ambition-A-Strategy-for-Funding-Higher-Education.pdf>

⁵ http://www.ucd.ie/t4cms/Delivering_Impact_UCD_April_2015.pdf

Demand for Student Accommodation

There is a growing demand for PBSA as evidenced in the 2015 HEA Report⁶, by the information provided by all publicly funded HEIs and by analysis and research conducted by a number of private firms. Taking just one example, DCU currently has four applications for every available bed space of on-campus student accommodation that they have available.

WHILE THERE IS A LIMITED SUPPLY OF PBSA AT THE MOMENT THIS IS INCREASING AT THE PRESENT TIME AND IS FORECAST TO INCREASE OVER THE COMING YEARS AS DEMONSTRATED BY THE FIGURES AND DATA CONTAINED IN THIS STRATEGY.

It is apparent, from the strong levels of demand that students generally would prefer to reside in on-campus accommodation and research internationally has shown that students living in on-campus accommodation have higher retention rates than commuter students⁷, and also exhibit higher scores on developmental scales⁸.

In addition, research on the transition from school to higher education, commissioned by the National Forum for the Enhancement of Teaching and Learning, highlights the impact that long commutes can have for students new to higher education. The report highlights that "...as commuting times increase, so too does the transitional challenge. It is likely that

commuting times impact on a student's ability to engage with College, in particular to participate in extracurricular events and social activities in the evenings. Also, a longer commute is likely to be more tiring and may have a knock-on impact on academic aspects also"⁹.

It is vital therefore that relevant stakeholders continue to work together to increase the supply of student accommodation in the coming years. The economic benefit of these developments is quite substantial both through the creation of jobs during the construction phase and through expenditure by the students and their families in the local economy.

⁶ <http://www.education.ie/en/Publications/Education-Reports/Report-on-Student-Accommodation-Demand-and-Supply.pdf>

⁷ Gormley, B. (2015). *Commuting versus resident students: Difference in Irish Student Engagement, Social and living conditions based on place of residence*, unpublished Ed. D Thesis, University of Sheffield.

⁸ Pascarella, E.T., Terenzini, P.T. (2005). *How College affects Students: A third decade of research*. San Francisco: Jossey – Bass Publishers.

⁹ Chickering, A., and Reisser, L. (1993) *Education and Identity*. San Francisco: Jossey – Bass Publishers

⁹ <http://www.teachingandlearning.ie/wp-content/uploads/2015/08/Research-Report-6-Transitions-from-Second-Level-FE-to-Higher-Education.pdf>

Appropriately located high-quality, purpose-built and professionally managed student accommodation, can make educational institutions more attractive to students from Ireland and abroad, and can also become a revitalising force for regeneration areas.

This Strategy is designed to set out the context for the development of additional student accommodation and also sets out a significant number of Action Points to ensure that additional student accommodation is delivered in the short, medium and long-term and that such developments are integrated into the communities in which they are sited for the betterment of the whole community.

However, it is important to acknowledge that it is not possible, or practical, to develop PBSA accommodation on or off campus to fully meet student demand and accordingly, there remains a role for more traditional student accommodation including both “Digs” accommodation and also private rented accommodation.

Current Student Numbers

Currently, all indicators point to a significant increase in full-time students attending publicly funded HEIs for the next decade. The HEA Key Facts and Figures for 2015/2016, published in November 2016, highlighted that there were 179,354¹⁰ full-time enrolments in Department of Education and Skills (DES) aided HEIs in the academic year 2015/2016 (169,363 of those students attend either a university or an institute of technology). Enrolments have increased from 173,649 in 2014/2015 and from 169,254 in 2013/2014.

International Students

Irish Educated, Globally Connected, the *International Education Strategy for Ireland, 2016-2020*¹¹ was published in October 2016 and shows that in 2010/2011, 20,995 international students attended publicly and privately-funded Irish HEIs. This increased by 58% to 33,118 international students in 2014/2015. The increase over the period was primarily driven by increases in the non-EU student cohort, which increased by 85% from 11,604 to 21,440 (compared to a 25% increase in the EU student cohort). Looking at the breakdown by level of study since 2010, the largest increase has been seen in the number of students at undergraduate level, which increased by 68% from 15,821 in 2010/2011 to 26,549 in 2014/2015. The numbers of postgraduate students also increased by 32% from 4,758 to 6,283.

The International Education Strategy has set a growth target of 33% for the higher education sector, which will result in an increase in international students in both public and private HEIs from 33,118 in 2014/2015 to approximately 44,000 by the end of the 2019/2020 academic year.

The availability of on-campus PBSA is an essential element of a HEI’s internationalisation strategy. HEIs have consistently reported that international students demand guaranteed accommodation for at least the first year at time of recruitment. Continued increases in international student numbers, combined with the impact of increased domestic student numbers, will put further pressure on the availability of PBSA.

¹⁰ <http://www.heai.ie/sites/default/files/hea-201516-key-factsfigures.pdf>. This does not include international students studying in the English language sector or in colleges offering higher education courses which are not funded by the HEA

¹¹ <https://www.education.ie/en/Publications/Policy-Reports/International-Education-Strategy-For-Ireland-2016-2020.pdf>

Projected Student Numbers:

In terms of increased demand, the DES has previously indicated there is potential for the number of full-time enrolments in DES aided HEIs to increase by 27% by 2030.

There are obviously a number of additional factors which could potentially impact on the demand for places in the coming years not least the implications of Brexit. There are approximately 11,000 Irish students attending HEIs in the UK, including 2,300 in Northern Ireland. In relation to Irish students currently studying in HEIs in the UK and those planning to do so in the coming years, the UK Government have outlined that the EU referendum outcome and the triggering of Article 50 will not lead to any immediate change to the immigration status of current EU students, including those that are on courses in this academic year (2016–17).

However, there may be implications for Irish students studying in the UK in the coming years, depending on the terms negotiated for Brexit. The DES is keeping this matter under constant review in light of the potential implications for Ireland including any potential future implications on demand for third level places in Irish HEIs. However, no additional demand data for PBSA has been factored into this Strategy in relation to Brexit as the outcome of the negotiations and the implications of this will not be known for some time.

The HEA have conducted extensive research on the demand for bed spaces for on-campus PBSA. This has involved liaising with in excess of 30 HEIs and asking them for data on demand which is not being met by available supply. As highlighted in the previous chapter, it is anticipated that student numbers will continue to increase in the coming years and this will lead to an increase in demand for PBSA.

DISCUSSIONS WITH HEIs AND OTHER STAKEHOLDERS SUGGEST THAT THE SHORTAGES OF AVAILABLE ACCOMMODATION ARE HIGHER IN DUBLIN, CORK, GALWAY AND LIMERICK. THE SUPPLY OF ACCOMMODATION IN OTHER AREAS IS GENERALLY ADEQUATE TO MEET DEMAND AT THE CURRENT TIME, ALTHOUGH AS DEMONSTRATED IN THE FIGURES, DEMAND IS PROJECTED TO INCREASE IN THE COMING YEARS.

The demand data is based on applications in each HEI from students for available bed spaces. The demand data is calculated from the number of students attending the HEI who have requested on campus accommodation vs. the number of available student bed spaces on campus. In terms of the projected demand this has been estimated through to 2024 based on information provided by each Higher Education Institution. Allowances have been built in for a higher percentage of demand from International and Erasmus students.

keep pace with the growth in student numbers, creating a situation whereby the market is structurally under-supplied.” This research also goes on to say that “compelling market fundamentals have brought global student housing specialists to Dublin, helping to alleviate the prevailing undersupply”. Finally the report also notes that “Dublin’s student housing market is currently undergoing a rapid transformation from a relatively immature market to one which has the world’s leading global investors investing heavily here.”

This demand has also been highlighted by research conducted independently by Knight Frank¹² which outlines that “the provision of student accommodation in Dublin has failed to

Similarly, a recent Irish Student Accommodation report by Cushman & Wakefield¹³ highlighted that “*rising third level student numbers, combined with current shortages in private rental*

¹² <http://www.knightfrank.ie/research/dublin-student-housing-report-2017-4554.aspx>

¹³ http://www.sherryfitz.ie/files/p_20170110021353OVERVIEW%20IRISH%20STUDENT%20ACCOMMODATION%20REPORT%202016_17%20HR.pdf

04 DEMAND FOR PURPOSE BUILT STUDENT ACCOMMODATION (PBSA)

accommodation and purpose built student housing, particularly in Dublin, has caused a critical imbalance in the student accommodation sector. Encouragingly, a number of international players with specialist experience have come to Ireland to build and operate sustainable student housing accommodation. However, more is needed, presenting a significant opportunity for investors and developers alike.”

Based on the data available approximately 18% of full-time students in Ireland are accommodated in PBSA. This figure is low by international comparisons with the equivalent figure for the UK published by Higher Education Statistics Agency (HESA) being c. 27%¹⁴. This is based on 468,765 full-time and sandwich¹⁵ students (from a total of 1,740,545) who’s declared term-time accommodation in 2015/16 was in a HEI maintained property or in a private-sector hall of residence.

Year	Projected PBSA (HEI & private)	Projected Demand for PBSA
2017 (current)	33,441	57,075
2019	40,687	66,441
2024	54,654	75,640

There is an inbuilt margin of error of plus or minus 5% in terms of these figures.

English Language Training

Ireland in particular is an English language destination that is becoming more significant in the global stage. While there is also a strong and growing demand from this student cohort, these students tend to require accommodation for shorter periods of time. As outlined in **Irish Educated, Globally Connected**, the *International Education Strategy for Ireland, 2016-2020*¹⁶, figures from the Study Travel Magazine, Global Market report indicate around 106,000 students in high-quality English Language Training organisations in 2015. The report goes on to outline that the average length of stay per student in Ireland has increased from 3.8 to 6.1 weeks.

Based on these figures and on discussions with both HEIs and private suppliers of PBSA it is accepted that PBSA is not the optimum solution to meeting their accommodation needs, other than during the summer period, due to the requirement for a constant steady source of income to meet the costs incurred in developing PBSA. Based on duration of stay, this cohort of students accommodation needs are generally met through short term lets in either the private rental sector or tourist accommodation.

Accordingly, the demand data included in this Strategy does not include any additional demand based on students attending private language schools.

¹⁴ <https://www.hesa.ac.uk/data-and-analysis/students>

¹⁵ Sandwich students is a term used in the UK to describe university students whose courses include a one year placement within a relevant industry, for example business, a science discipline or teaching.

¹⁶ <https://www.education.ie/en/Publications/Policy-Reports/International-Education-Strategy-For-Ireland-2016-2020.pdf>

Existing PBSA bed spaces

The data on existing student bed space accommodation was informed through contact with all HEIs and a number of private organisations including developers, managers and providers of PBSA. The current number of bed spaces, owned by both publicly funded HEIs and private organisations, suitable for student accommodation is estimated to be 33,441.

Existing PBSA Bed Spaces 2017			
Location	HEI	Private	Total
Dublin	7,147	5,285	12,432
Cork	813	2,975	3,788
Galway	764	2,466	3,230
Limerick	2,590	4,226	6,816
Waterford	446	1,919	2,365
Other locations	0	4,810	4,810
Overall Total	11,760	21,681	33,441

There is a margin of error rate of plus or minus 5%.

Role of the Private Sector in developing PBSA

It is acknowledged that it is not possible to rely solely on the publicly funded HEIs to increase the supply of PBSA given the significant upfront capital investment required and the competing demands for capital investment that prevail in other areas in our HEIs. It is clear therefore, that there is a requirement for investment from both publicly funded HEIs and private developers to seek to comprehensively address the identified shortfall in PBSA and the information to hand highlights that there are at least 10,000 additional bed spaces planned or under construction by private developers.

Pipeline in Public Higher Education Institutions (HEIs)

The HEA statistical publication for 2014/2015¹⁷ demonstrated that there were 81,566 full-time students enrolled in HEIs in the Greater Dublin area out of the total of 173,649 full-time enrolments nationally. This equates to 47% of the total full-time enrolments and shows why the main concentration of PBSA development is centred on the Greater Dublin area. The equivalent figures for Cork are 23,883 (14%), Galway 19,265 (11%), Limerick 19,058 (11%).

Maynooth University delivered 296 new on-campus bed spaces, and UCD delivered 350 new on-campus bed spaces which came on stream for the commencement of the 2016/17 academic year.

In addition, eight HEIs are currently engaged in construction, or going through the planning or pre-planning phases for PBSA projects, namely NUIG, TCD, UL, DCU, UCC, UCD, MU and DIT. These projects have the potential to deliver in excess of 11,000 additional PBSA bed spaces. Full details are contained in Appendix A.

FUTURE PIPELINE:

AN ADDITIONAL 1,117 PBSA BED SPACES (646 HEI, 471 PRIVATE) HAVE BEEN COMPLETED SINCE THE COMMENCEMENT OF THE *REBUILDING IRELAND* ACTION PLAN IN JULY 2016.

¹⁷http://www.heai.ie/sites/default/files/full_time_enrolments.xlsx

06 PIPELINE OF PBSA PROJECTS UNDER DEVELOPMENT

Future bed space development is based on data provided by HEIs and private developers and is in addition to data compiled by both the HEA and Construction Information Services (CIS) from public records held in relation to PBSA developments which have sought planning permission.

The DES has now established that there is a significant pipeline of PBSA developments coming on-stream nationally. 5,251 additional bed spaces are currently under construction. Of these; 1,444 bed spaces will come on stream in September 2017 and 3,807 bed spaces will come on stream in 2018 and 2019.

A further 1,995 bed spaces have been granted planning permission but have not yet commenced construction. In addition to these future developments, 3,524 bed spaces have been applied for and are awaiting planning permission.

Total: Based on the preceding figures, there is now an identified potential for an additional 10,770 PBSA bed spaces to be developed by 2019 based on projects under construction and projects where planning permission has been applied for and/or already granted. Rebuilding Ireland includes a target to deliver 7,000 additional bed spaces by 2019 and the data suggests that this will be met and there is potential to exceed the target if all identified projects proceed as anticipated.

When combined with the projects that are currently at pre-planning phases in the HEIs, the DES has identified the potential for at least an additional 21,000 PBSA bed spaces places by 2024 over the baseline figure of 33,441 PBSA bed spaces which are currently available.

It should be noted that these projections only include private sector developments where planning permission has been applied for. The DES is also aware of various announcements of potential project developments by private developers however, until such time as planning permission is applied for in respect of these developments it is not possible to accurately record the detailed data. Additional projects from both HEIs and private developers will be reflected in updated projection charts to be included in the Quarterly Reporting document as they arise.

PBSA Bed Space Projections

	2014	2017 (Current)	2019 (includes all projects on-site and where P/P has been granted)	2021 (includes all projects where P/P has been applied for and HEI projects in more advanced stages of planning)	2024 (includes HEI projects at early investigative stages)
Dublin	10,287	12,432	18,142	25,346	28,806
Cork	3,788	3,788	4,352	5,490	5,490
Galway	3,230	3,230	3,887	4,232	4,702
Limerick	6,816	6,816	6,831	7,331	8,181
Waterford	2,365	2,365	2,365	2,365	2,365
Other locations	4,810	4,810	5,110	5,110	5,110
Overall Total	31,296	33,441	40,687	49,874	54,654

(as at 31 May 2017)

Planning and Timing of Project Delivery

(a) Planning Guidance: New planning policy guidance was issued to local authorities and An Bord Pleanála clarifying that the use of student accommodation complexes outside of the academic year by non-student occupiers was acceptable. The use of PBSA during these periods provides a potential additional income stream, thereby aiding the overall viability of these projects through their occupation throughout the calendar year. This clarification was contained in Circular PL 8/2016 APH 2/2016 which issued from the DHPCLG on 28 July 2016. (Details contained in Appendix B)

b) Timing of Project Delivery – The Irish Universities Association (IUA) has previously identified the timing on delivery of projects as a significant impediment to the accelerated delivery of PBSA. In response to this issue, the DES liaised with the DHPCLG in the preparatory stages for the development of the Planning and Development (Housing) and Residential Tenancies Act, 2016¹⁸ which was passed by the Oireachtas in December 2016. This includes facilitating (for a limited time-period) planning applications for large-scale housing developments and student accommodation developments (which contain in excess of 200 Student Bed-spaces), being made directly to An Bord Pleanála. This legislation will provide greater certainty in timescales for the securing of planning permission to the proposers of both public and private PBSA schemes in progressing projects from design to delivery.

(c) Dublin City Development Plans and Student Accommodation

The DES welcomes the specific references to the development of student accommodation contained in the Dublin City Development Plan¹⁹ 2016-2022 which came into effect on 21 October 2016. An extract from the plan is contained at Appendix C.

In the plan it states that “Dublin is successful in attracting international students and English language students in line with national and City Council Development Plan policies. There is a growing shortage of student accommodation; however, there are investors and providers willing to develop such facilities. In other cities, clusters of professionally-managed student accommodation are significant forces for regeneration of areas.”

The DES also welcomes the fact that permissions for student housing will normally be subject to a condition requiring a planning permission for a change of use to other types of residential accommodation.

¹⁸ <http://www.irishstatutebook.ie/eli/2016/act/17/enacted/en/print>

¹⁹ <http://dublincitydevelopmentplan.ie/index.php>

Cork

The DES welcomes the specific references to the development of student accommodation contained in the Cork City Development Plan²⁰ 2015-2021 which outlines in respect of Student Accommodation that “Given the growth in recent years of the numbers of third level students together with the planned expansion of the city’s major educational/facilities, there is a demand for specific residential accommodation to cater for this need.”

The Plan also details a number of factors that will apply to applications for planning permission for PBSA including that “all permissions for student housing shall have a condition attached requiring planning permission for change of use from student accommodation to other type of accommodation. Future applications for this type of change of use will be resisted except where it is demonstrated that over-provision of student accommodation exists in the city.”

Galway

The DES welcomes the specific references to the development of student accommodation contained in the Galway City Council Development Plan²¹ 2017-2023 which outlines in respect of Student Accommodation that “The City Council supports the provision of high quality, professionally managed purpose built student accommodation on/off campus at appropriate locations in terms of access to sustainable and public transport modes and third level institutes, in a manner that respects the residential amenities of the surrounding area.” The plan also outlined that Student accommodation should be designed to be attractive, accessible, safe, and minimise adverse impacts on the surrounding area while creating mixed, healthy and inclusive communities.

The Plan also details a number of factors that will apply to applications for planning permission for PBSA including that “All permissions for student accommodation shall have a condition attached requiring planning permission for a change of use from student accommodation to other types of accommodation. Future applications for change of use will be resisted except where it is demonstrated that continuing over-provision of student accommodation exists in the city.”

²⁰ <http://www.corkcitydevelopmentplan.ie/>

²¹ <http://www.galwaycity.ie/development-plan-downloads-2017/>

Action Points

1. In order to have a comprehensive picture of the progress of development in the sector the DES in conjunction with the HEA will track the progression of all developments of PBSA from pre-planning stage right through to completion and provide a quarterly update on progress. This Quarterly Reporting document will track both HEI and private developments of PBSA in Ireland and will be utilised to monitor the progress made in relation to the targets outlined in this Strategy. Bed-spaces will be used as the metric to describe and measure the scale of PBSA development. This will ensure that we have a complete picture of the pipeline of PBSA developments coming on-stream which will help to inform policy development in this area into the future. An initial Quarterly report for 31 May 2017 is contained at Appendix A containing details of all known PBSA projects.

Responsibility: DES in conjunction with HEA.

2. Monitor the effects of the implementation of the Planning and Development (Housing) and Residential Tenancies Act, 2016 on the speed of granting of planning permission for PBSA and continue to work with HEIs and the DHPCLG to speed up the process of applications for planning permission if that is deemed necessary in the future.

Responsibility: DES in conjunction with DHPCLG.

3. Monitor Planning Permissions Granted to ensure that there are no undue restrictions placed on the development of PBSA.

Responsibility: DES in conjunction with HEA.

4. As has been demonstrated, most city development plans have included a clause to stipulate that where planning permission is granted for the development of PBSA, a change of use permission will not be granted unless it has been demonstrated that there is an over-provision of student accommodation existing in the city. The inter-departmental steering group on student accommodation will monitor the development of PBSA to ensure that there is not a proliferation of change of use permissions sought in respect of planning permissions granted for PBSA.

Responsibility: Inter-Departmental Steering Group on Student Accommodation.

Inter-departmental steering group on Student Accommodation

The publication of the 2015 HEA report on Student Accommodation led to the establishment of an inter-departmental steering group. This group is chaired by the Deputy Secretary General of the DES and is comprised of DES officials in addition to representatives from the DHPCLG, the Department of Public Expenditure and Reform (DPER), the Department of Finance, the HEA, the IUA, the Technological Higher Education Association (THEA), USI, UL, TCD and the National Treasury Management Agency (NTMA).

The group meets regularly and provides a coordinating mechanism to ensure that all stakeholders, including HEIs, have access to detailed information regarding student accommodation including information relating to potential financing and delivery models.

Supply and Demand of PBSA

It is estimated that there is currently an unmet demand for 23,634 bed spaces. Drawing together the estimates of supply of, and demand for, PBSA shows that the demand for PBSA currently outstrips supply and this trend will continue to 2024. This data is based on current and projected development of PBSA. It is acknowledged that the timelines for delivery of all accommodation projects including PBSA

will always be impacted by a number of factors including the planning process, legal challenges, access to finance, delays during the build, prioritisation of investment etc. Accordingly, the timelines for delivery of all projects detailed in this Strategy and in the future Quarterly Reports will be monitored on an ongoing basis and will be updated regularly to ensure that all timelines are as accurate as possible. A margin of error rate of plus or minus 5% has been built into the figures.

07 ALIGNMENT OF SUPPLY AND DEMAND

Current and Projected Supply and Demand

	Supply 2017	Demand 2017 (excess demand)	Supply 2019	Demand 2019 (excess demand)	Supply 2024	Demand 2024 (excess demand)
Dublin	12,432	30,298 (17,866)	18,142	35,913 (17,771)	28,806	42,375 (13,569)
Cork	3,788	5,486 (1,698)	4,352	6,463 (2,111)	5,490	7,391 (1,901)
Galway	3,230	5,491 (2,261)	3,887	6,093 (2,206)	4,702	6,652 (1,950)
Limerick	6,816	7,724 (908)	6,831	9,000 (2,169)	8,181	9,798 (1,617)
Waterford	2,365	2,459 (94)	2,365	2,584 (219)	2,365	2,708 (343)
Other locations	4,810	5,617 (807)	5,110	6,388 (1,278)	5,110	6,716 (1,606)
Overall Total	33,441	57,075 (23,634*)	40,687	66,441 (25,754*)	54,654	75,640 (20,986*)

* It should be noted that this table solely relates to PBSA and does not include figures for Student Accommodation Bed Spaces in Private Family Homes (Digs). We want to increase the number of students taking up Digs accommodation to around 4,000 per year by 2019. This would be an increase of 1,500 per annum compared to 2016. This means that the overall supply shortfall by 2019 becomes 21,754. Similarly, the figure for the shortfall by 2024 becomes 16,986 once you factor in the projected students being accommodated in Digs.

Survey on student accommodation

Access to and analysis of accurate and timely data is key to evidence-based policy development and to ongoing monitoring of the housing situation in Ireland. Providing opportunities for students to provide feedback and input is important for the introduction and development of appropriate student services locally and nationally. In the UK, for example, a Research Agency called Red Brick Research conduct a National Student Housing Survey on an annual basis. In Ireland, USI have conducted an Irish Student Housing Survey²² in early 2017. The survey data from 2017 is currently being assessed and analysed and USI plans the launch of the results of this survey in the coming months.

Action Points:

5. Maintain the established inter-departmental steering group on student accommodation as a co-ordinating mechanism to ensure that all stakeholders, including HEIs, have access to detailed information regarding student accommodation including information relating to potential financing and delivery models.

Responsibility: Department of Education and Skills.

6. At its next meeting the inter-departmental steering group on student accommodation will consider:

- (i) Whether the membership of the Group should be expanded to include representatives of private developers and managers of PBSA which would give a greater insight into the development of privately built PBSA;
- (ii) Whether the membership of the Group should be expanded to include representatives of financing providers (Housing Finance Agency (HFA), European Investment Bank (EIB), Ireland Strategic Investment Fund (ISIF));
- (iii) Whether a once-off or annual forum or conference on student accommodation should be created. This forum/conference could potentially include representatives of private developers and managers of PBSA, representatives of financing providers, in addition to representatives of

²² <http://usi.ie/campaigns/usi-launches-national-student-housing-survey/>

all of the existing members of the inter-departmental steering group on student accommodation. This would potentially allow an open opportunity to address the challenges and opportunities of student accommodation provision and to allow for students and stakeholder experiences and good practices to be shared.

Responsibility: Inter-Departmental Steering Group on Student Accommodation.

7. The inter-departmental steering group on student accommodation will examine the data that is derived from the USI survey once it has been published. USI will also outline its future plans for conducting periodic national surveys on student accommodation with a view to ensuring that there is up to date accurate information in relation to Student Accommodation in Ireland. The inter-departmental steering group will contribute to the development of future national surveys on student accommodation.

Responsibility: USI and Inter-Departmental Steering Group on Student Accommodation.

In terms of building new PBSA, it is estimated that it costs c. €100,000 per bed space²³ (current values for fully fitted out bed spaces, excluding any costs associated with land purchase). Land cost would increase this further by somewhere in the region of €15,000 to €35,000 per bed space if developments require the purchase of land. Major refurbishments are also carried out by the HEIs on existing bed spaces over a period of 10-20 years. This is a costly exercise due to health and safety requirements and the cost of refurbishing each bed space and common areas.

Availability of Land

The IUA has identified access to land as a significant barrier for a small number of universities. Specifically, this impacts TCD and UCC, and to a lesser extent NUIG, due to their city centre locations. TCD, UCC and NUIG, as well as most other universities have been engaging with NAMA in relation to the acquisition of suitable sites. The issue of land availability for the development of all types of housing accommodation, including PBSA, is a wider national issue which is identified by *Rebuilding Ireland* under Action 3.5. Work is ongoing in DHPCLG on developing a comprehensive database of publicly owned lands, in key development areas, that are available for housing development. In April 2017, the Housing Land Map²⁴ was launched by DHPCLG on the Rebuilding Ireland website featuring an interactive map of local authority, Housing

Agency, state-agency, semi-state and other publicly controlled lands with potential to be developed for new housing. This database will inform the scope for the development of suitable PBSA projects on publicly controlled lands.

Build Cost and Cost of Financing

The university sector²⁵ has identified the build cost and cost of financing as the single biggest impediment to the delivery of additional PBSA units. In addition, they have also previously identified difficulties availing of resources to fund the build cost. The viability of PBSA developments is determined by the cost of the build, the amount which is required to be borrowed, the cost of capital and the rental income available.

²³ Irish Universities Association submission to Minister for Housing, Planning, Community and Local Government – June 2016

²⁴ <http://rebuildingireland.ie/news/rebuilding-ireland-land-map/>

²⁵ Irish Universities Association submission – June 2016

08 COSTS OF DEVELOPMENT OF PBSA INCLUDING LAND AVAILABILITY

Clearly there are competing demands for essential academic and research infrastructure from the very limited capital funding available, particularly given the significant growth in student numbers over recent years.

Universities have outlined that rental incomes are also constrained due to the need to ensure affordability for the student (particularly relevant in the Dublin region) and also to compete with the general rental market. If the costs of borrowing can be lowered then projects become more financially viable.

In addressing this project financing issue, the IUA, THEA and the DES have worked closely with the DHPCLG during the legislative process for the development of the Planning and Development (Housing) and Residential Tenancies Act, 2016, which was passed by the Oireachtas in December 2016. This legislation now specifically facilitates HEIs²⁶ borrowing monies from the Housing Finance Agency for the purposes of financing PBSA development. It is anticipated that this will support the development of additional PBSA projects by HEIs due to the increased access to financing opportunities and the lower rate of financing costs that will be available from the HFA.

Action Points:

8. DES and DHPCLG to work with HEIs and the HFA with a view to accelerating the provision of financing for PBSA projects. The HFA have already commenced work on the preparatory legal work necessary to deal with applications for financing from HEIs for the purpose of building PBSA. The HFA will also implement a dedicated streamlined application process for HEIs.

Responsibility: DES in conjunction with HFA and HEIs.

9. Develop and run workshops on financing models and mechanisms for HEIs on how they can access and structure the financing of PBSA, especially in terms of off-balance sheet solutions, with identified key stakeholders including the EIB, ISIF, NTMA, the HFA and the HEIs. This will build on the National Information Session on Student Accommodation which was previously hosted by the DES.

Responsibility: Department of Education and Skills.

10. Officials from DES will continue to liaise with officials from DHPCLG in relation to the development of the Housing Land Map and database detailing publicly controlled lands available for new housing development including PBSA. DES will continue to arrange and facilitate meetings between relevant stakeholders where potential for PBSA is identified.

Responsibility: DHPCLG in conjunction with DES.

²⁶ However, HEIs will not be in a position to borrow monies until a Borrowing Framework is put in place for the sector which is dealt with in the chapter on IoT Sectoral Issues.

Dublin Institute of Technology (DIT) Grangegorman on-campus PBSA

The area of Grangegorman was designated a Strategic Development Zone (SDZ) by Government order on the 21st of December 2010. This order was made in accordance with Part IX of the Planning and Development Acts 2000-2011 and the Grangegorman Development Agency named in that order subsequently prepared a planning scheme for the lands. The site at Grangegorman is being developed as a consolidated campus for DIT together with other health services and educational infrastructure.

IN THE SHORT TERM THERE ARE APPROXIMATELY 1,100 STUDENTS STUDYING WITHIN THE GRANGEGORMAN CAMPUS (SINCE SEPTEMBER 2014). IT IS ANTICIPATED THAT SOME 7,500 FULL TIME STUDENTS WILL BE ACCOMMODATED ON THE GRANGEGORMAN SITE IN 2019 WITH THE NUMBER INCREASING TO C. 12,000 FULL TIME STUDENTS BY 2022.

One of the great benefits of DIT's relocation to Grangegorman will be the creation of student housing on site which ultimately aims to provide 2,000 bed spaces of PBSA in a number of buildings on site. The provision of PBSA will assist in creating an 'urban' feel to the Quarter, create passive surveillance and assist in the creation of a living campus. The first phase of development will involve the creation of 700 bed spaces and the procurement route that is being explored is an off-balance sheet service concession model through private sector financing. This is currently in the design phase with a view to going to tender in the coming

months for the appointment of the service concession following a competitive dialogue process.

Borrowing Framework for Institutes of Technology

As is apparent from the table detailing the future pipeline of PBSA in HEIs, no Institute of Technology (IoT) other than DIT is in a position to develop PBSA. The rest of the IoTs have identified the potential to develop c. 5,000 PBSA bed spaces on or near their existing campuses within a five year period. However, IoTs²⁷ have

consistently highlighted that access to capital is the largest barrier to the development of on-campus PBSA by IoTs. The absence of a borrowing framework prevents IoTs from accessing financing from financing Agencies such as the EIB, ISIF and the HFA for the purposes of financing the development of PBSA. They have highlighted that borrowing for the purpose of the development of PBSA would create an ongoing income stream for IoTs and increase their non-Exchequer income.

Universities have traditionally had autonomous borrowing powers as they are classified as outside General Government Borrowing (GGB) and hence their borrowings are not included in the State's balance sheet and do not impact on the Government's available fiscal space. The classifications of borrowings is determined by Eurostat and relates to both autonomy and sources of income. For the foreseeable future, any agreement that would allow IoTs to borrow is likely to impact on the GGB and encroach on fiscal space.

The DES will continue to support efforts to identify financing solutions for PBSA in the IOT sector.

Action Points:

11. The DES will support DIT in developing their proposed off-balance sheet service concession model with a view to ensuring that it delivers on campus PBSA for DIT in Grangegorman.

Responsibility: DES in conjunction with DIT and NDFA.

12. Following finalisation of the model for DIT in Grangegorman, the DES will explore, with THEA, the representative body for the sector, the HEA and other IoTs, the potential for this model to be used by other IoTs for the development of PBSA where there is unmet demand for PBSA in the area and projects are financially viable.

Responsibility: DES in conjunction with THEA and the HEA.

13. Financing mechanisms will be examined with a view to seeking to identify other potential off-balance sheet solutions which could enable IoTs to develop further PBSA projects where there is unmet demand for PBSA and projects are financially viable.

Responsibility: Inter-Departmental Steering Group on Student Accommodation.

²⁷ Technological Higher Education Association (THEA) submission

Student Parents

A review on the barriers for lone parents accessing higher education, commissioned by DES, is currently being finalised. The review has identified a range of barriers in the areas of welfare, childcare and housing affecting lone parents, and has highlighted the particular difficulty lone parents experience while juggling study with parental responsibilities.

THE REVIEW OUTLINES THE SPECIFIC DIFFICULTIES THAT LONE PARENTS, AND STUDENT PARENTS MORE GENERALLY, FACE IN TERMS OF THE ADDITIONAL COSTS OF SUPPORTING A HOUSEHOLD AND THE SPECIFIC ACCOMMODATION NEEDS OF STUDENTS WITH DEPENDENTS.

The review has also identified the fact that the specific needs of lone parents, and student parents more generally, are often not specifically catered for in policies and practices of Higher Education Institutions.

The availability of suitable accommodation, including on campus accommodation, is an issue for student parents whose needs are often different from that of a student with no child dependents. It is important that the needs of this cohort of students are taken into account when future accommodation plans are being developed by HEIs.

Students with disabilities

There is also currently a significant demand for bed spaces for students with disabilities. The demand is not being fully met by the available

supply. Students have varying accommodation requirements. On campus accommodation is generally regarded as the preferred option to enhance student participation and can be particularly beneficial for students with disabilities. The type of accommodation required and the level of support services that are necessary place a particular economic demand and inclusion challenge on the accommodation provider. This has space, cost and inclusion implications. The 2015 HEA Report has already recommended that any future developments should comply with the recommendations for enabled access as published by the DHPCLG.

In addition, HEIs will be encouraged to consider allocating additional bed spaces for students with disabilities as additional on campus bed spaces are delivered.

Allocation Policies of Universities

As part of the development of this Strategy, the DES sought information on the policies in place for the allocation of PBSA by the universities²⁸. The data supplied by the universities shows that less than 4% of domestic students in PBSA are from the county in which the university is located or, where they are from that county, they are coming from more than 45km from the university in question. There are a number of mitigating factors taken into account which, if met, mean that students from the county in which the university is located can still be allocated PBSA. This would include arrangements for students with disabilities or other specific needs or particular responsibilities. The following is a synopsis of the allocation policies of the various Universities for the 2016/17 academic year.

	1 st Year Students	Continuing Students including Post-Grads	International Students	Special Circumstances
Trinity College Dublin*	40%	31%	22%	7%
University College Dublin	32%	11%	46%	11%
Maynooth University	55%	20%	25%	(8% is allocated to special circumstances)
Dublin City University	75% between these two categories as data is not split out.		25%	Data not split out for this category.
University of Limerick	40%	35%	25%	Data not split out for this category.
NUI Galway	No split data provided other than accommodation is reserved for first year and International students only.			
University College Cork**	38%	29%	33%	Data not split out for this category.

²⁸ Information collated and provided to DES by the Irish Universities Association

10 ALLOCATION OF STUDENT ACCOMMODATION

* In addition to property owned and operated by Trinity College, Trinity has nominations with private operators and other institutions for a further 300 beds. These will be divided between international students (240 beds) and final year and postgraduate students (60 beds).

** First year students must be living at least 45km from Cork city to qualify for PBSA.

Nomination Agreements

Nomination Agreements generally entail a HEI having the ability to nominate its own students to fill bed spaces in PBSA owned and managed by a private provider on or near the campus of the HEI. An agreement is entered into between the HEI and the private provider on an annual or multi-annual basis for the HEI to nominate a specified number of its own students to fill a specified number of bed spaces and the HEI is liable to fill those bed spaces it has agreed to nominate for. The benefits for a HEI from entering into a nomination agreement is that it provides an increase in the available stock of PBSA available to the HEI to allocate to its own students to complement their existing offering in line with their existing allocation policies and procedures.

Nomination agreements are commonly utilised in the UK and they offer HEIs a means of sourcing PBSA from the private sector. However, they are not a common feature in the Irish market, although as outlined in the information allied to the foregoing table, they are utilised by TCD.

Based on the information to hand, the lack of utilisation of nomination agreements in Ireland appears to mainly occur due to a lack of clarity about the process, including the delineation of responsibilities and control, and also due to the significant demand already in play from students to source accommodation directly from private providers.

It is recommended that HEIs should seek to build relationships with private developers of PBSA with a view to establishing either formal or informal nomination agreements where the HEI has an identified demand for PBSA on or near campus from its own students that it cannot meet from its own existing stock of PBSA. The development of nomination agreements has the potential to increase the ability of the HEI to meet the demand for PBSA from its own students.

Action Points:

14. HEIs will consult with all relevant stakeholders, including USI, local students' unions, student parents, lone parents and students with disabilities, on the adaptation of existing stock of PBSA and on the design for new PBSA.

Responsibility: HEIs.

15. HEIs will ensure that their Accommodation offices/officers are aware of the specific needs of student parents, including lone parents, and are able to provide appropriate information to such students on sourcing accommodation.

Responsibility: HEIs.

16. HEIs are encouraged to allocate additional bed spaces for student parents, lone parents and students with disabilities as additional on campus bed spaces are delivered.

Responsibility: HEIs.

17. HEIs to engage with private developers of PBSA to determine whether formal or informal nomination agreements can be put in place to facilitate the provision of PBSA to students attending HEIs.

Responsibility: HEIs.

STUDENT ACCOMMODATION BED SPACES IN PRIVATE FAMILY HOMES (DIGS)

11

A number of initiatives have been undertaken since 2015 to support an increase in provision and take up of accommodation for students in private family homes.

AS PART OF THE RESPONSE TO THE 2015 HEA REPORT ON STUDENT ACCOMMODATION, FUNDING WAS PROVIDED TO USI TO PROGRESS SOLUTIONS FOR STUDENTS IN NEED OF ACCOMMODATION.

This funding allowed USI to develop their homes.usi.ie website, to communicate more effectively to students and homeowners, and to carry out research into this important issue. €30,000 was provided to USI by the HEA to fund their 2016 #HomesForStudy campaign. Matching students with offers of digs accommodation has become a main focus of the USI campaign and this funding was designed to encourage and support the take-up of the rent-a-room scheme by homeowners in areas adjacent to HEIs to accommodate both new and existing third-level students. Following the publication of *Rebuilding Ireland*, funding for a full-time Student Housing Officer for the 16/17 academic year has been provided by the DHPCLG to the USI. This role was filled by USI following a recruitment campaign in October 2016. In addition, Budget 2017, provided for an increase in the ceiling for exemption from

income tax under the Rent-a-Room scheme. The ceiling increased from €12,000 to €14,000 for 2017 and subsequent years. This is a significant win – win situation, as students get accommodation and homeowners can earn up to €14,000 a year tax - free providing this service. A Final Report on the 2016 campaign²⁹ published by USI showed that at least 2,478 students accessed digs accommodation directly as a result of the campaign spearheaded by USI. These 2,478 bed spaces alleviate some of the pressure from students seeking accommodation from the private rented sector as they are generally bed spaces in family homes which are otherwise unoccupied and not available to rent as part of the private rented sector market. The following table details the bed spaces provided.

Number of Digs published online on selected Digs services across the country with the number of students housed by the end of September 2016.

Service	Number of Digs Online	Number of Students Housed
Homes.usi.ie	770	770
TCD SU	500	400
LYIT SU	11	11
NUIG SU	833	557
GMIT SU	No Data	300
AIT SU	40*	60
IT Sligo SU	21	15
CIT SU	No data	250
St. Angela's SU	No data	20
IT Tralee SU	No data	30
Carlow College SU	No data	15
DKIT SU	15*	50
TOTAL	2,190	2,478

* Multiple Digs spaces available in advertised properties.

USI are now gearing up for their 2017 campaign, the aim of which will be to build on the success of the 2016 campaign and deliver additional bed spaces for rent to students in private homes thus alleviating some of the pressure on the private rental market in areas where demand outstrips supply. We want to increase the number of students taking up Digs accommodation to around 4,000 per year by 2019. This would be an increase of 1,500 per annum compared to 2016.

²⁹ USI Student Housing Campaign Final Report 2016

Current work underway

On foot of a commitment contained in the *Rebuilding Ireland – Strategy for the Rental Sector*³⁰ published by the DHPCLG in December 2016, a Working Group has been established to examine and report on the tax treatment of landlords (or rental accommodation providers), and to put forward options, where appropriate, for amendments to such treatment. The Working Group is chaired by the Department of Finance and its membership includes officials from DHPCLG, Revenue and the Residential Tenancies Board. A public consultation process ran from Friday 10 March to Friday 7 April 2017.

Action Points:

18. USI to continue to run their #HomesforStudy campaign.

Responsibility: USI.

19. DES to monitor the outcomes of the Working Group which has been established to examine and report on the tax treatment of landlords (or rental accommodation providers).

Responsibility: Department of Education and Skills.

As outlined in the *Rebuilding Ireland – Strategy for the Rental Sector*³¹ published by the DHPCLG in December 2016, rental trends have shown a dramatic pattern of boom and bust with rents rising sharply up to a peak around 2007, collapsing in most parts of the country until late 2011/early 2012 and increasing rapidly since then. That dramatic fluctuation in rents, which is undesirable for all participants in the rental sector, is primarily supply-related. The Student Accommodation sector is not immune to these pressures and the key cause of rental inflation in some parts of the country is down to a lack of supply, the same core issue behind almost all of the pressures throughout the housing market.

THE MOST EFFECTIVE WAY TO REDUCE AND STABILISE RENTS IN THE LONG-TERM IS TO INCREASE SUPPLY AND ACCELERATE DELIVERY OF ALL TYPES OF HOUSING. THE AIM OF THIS STRATEGY IS TO SUPPORT THE ACCELERATED AVAILABILITY AND DELIVERY OF STUDENT ACCOMMODATION INCLUDING BOTH DIGS AND PBSA, WHICH SHOULD IN TURN LEAD TO A STABILISATION OF THE COSTS OF ACCOMMODATION.

The actions in this Strategy are in addition to the actions already set out in the *Rebuilding Ireland – Strategy for the Rental Sector*. The Strategy for the Rental Sector introduced a Rent Predictability Measure to moderate rent increases in those parts of the country where the imbalance between demand and supply of rental accommodation is driving rent levels upwards most acutely. The Planning and Development (Housing) and Residential Tenancies Act 2016 gave effect to, and provided for the immediate implementation of, the Rent Predictability Measure. Areas of the country satisfying the statutory criteria will be designated as Rent Pressure Zones and rent increases in those areas are generally capped at 4% per annum for a period of 3 years. The measure was introduced with immediate effect in the four Dublin Local Authority areas and in Cork City. A further 12 Local Electoral Areas were designated as Rent Pressure Zones on 27 January 2017.

³⁰ http://www.housing.gov.ie/sites/default/files/publications/files/strategy_for_the_rental_sector_final.pdf

³¹ http://www.housing.gov.ie/sites/default/files/publications/files/strategy_for_the_rental_sector_final.pdf

12 COSTS AND AVAILABILITY OF STUDENT ACCOMMODATION

In terms of practical assistance for students seeking to access suitable accommodation, all universities and the majority of IoTs have either dedicated Accommodation offices and/or dedicated Housing/Accommodation officers who provide information to students that are seeking accommodation. The USI and the Residential Tenancies Board (RTB) also publish an annual Finance and Accommodation Guide³² to assist students in seeking accommodation. This is particularly beneficial for those students starting college for the first time.

Action Point:

20. Enhance co-operation between the HEI Accommodation offices/officers and the local Students' Unions and the USI Accommodation Officer with a view to alleviating the difficulty for students in accessing accommodation. To this end, HEIs will ensure that their accommodation offices/officers are in a position to provide specific information on sourcing accommodation to both existing, incoming and prospective students to alleviate the difficulty for students (particularly first year students) in accessing accommodation, including providing referrals to relevant third-party accommodation providers/service.

Responsibility: HEIs in conjunction with USI and/or local Students' Unions.

STUDENTS AND THEIR LOCAL COMMUNITIES

13

In recent times, some concerns have been raised about the development of PBSA in areas adjacent to HEIs and the impact that this can have on local communities and other residents.

The term "Studentification" has been adopted as a term to describe the process by which a given neighbourhood experiences an increase in the student population, to the point where the area becomes dominated by students (Smith 2002³³ & 2009³⁴). Studentification was identified by Smith as being an issue in university towns in the UK.

AS HIGHLIGHTED ALREADY, IN DUBLIN IN PARTICULAR, ALL HEIS ARE REPORTING THAT THEIR CURRENT PROVISION IS HEAVILY OVER-SUBSCRIBED AND STUDENTS ARE FINDING IT DIFFICULT TO SECURE ACCOMMODATION ON OR NEAR THEIR CAMPUSES. THE DES WILL CONTINUE TO WORK WITH STAKEHOLDERS TO ENSURE SUPPORT FOR THE FURTHER DEVELOPMENT OF PBSA BOTH BY HEIS AND PRIVATE DEVELOPERS.

If managed effectively, the presence of students in a community can be positive for both the students and community. This has been highlighted in the Dublin City Development Plan³⁵ which refers to the contribution of well managed student accommodation to regeneration of urban areas in other cities.

Management Plans:

The Dublin City Development Plan 2016-22 outlines that all applications for PBSA must be accompanied by documentation outlining how the scheme will be professionally managed including confirmation that all occupiers will be students registered with a third-level institution.

Documentation must also outline how the scheme will support integration with the local community, through its design and layout. An appropriate management plan should include details in relation to:

- the on-site management team;
- the building and the location;
- the local area;
- the security and monitoring measures in place;
- the ongoing monitoring and management of the building;
- how anti-social behaviour will be dealt with;
- integration with the community including community liaison.

³² <http://homes.usi.ie/wp-content/uploads/2016/10/USI-Finance-and-Accommodation-Guide-2016.pdf>

³³ Smith, N., (2002) 'New globalism, new urbanism: gentrification as global urban strategy'. *Antipode* 34 (3), 427-50.

³⁴ Smith, D., (2009). *Guest editorial: Student geographies, urban restructuring, and the expansion of higher education*. *Environment and Planning A*, 41 (8), 1795-1804.

³⁵ <http://dublincitydevelopmentplan.ie/index.php>

By developing and utilising an appropriate Management Plan for PBSA, the managers of PBSA can minimise any potential negative impacts from the development and its occupants on surrounding properties and neighbourhoods and can create a positive and safe living environment for students and develop and enhance the neighbourhoods in which they are situated for the betterment of the whole community.

A report commissioned by the Grangegorman Development Agency (GDA)³⁶, published in 2016, highlighted that “.....the ability of a city the size of Dublin to absorb students is greater than that of smaller cities and university towns in the UK where studentification has become an issue. It is important to note that the DIT is an existing institution whereby the existing students have been able to be absorbed into the city. It is anticipated that this will continue to be the case.”

Community and Voluntary Activities

Participation by students in community and voluntary activities can also encourage students to engage with their local communities and can also encourage local residents to recognise that such developments are positive for the regeneration of the community and the locality. Engagement with local communities can build on the long established tradition of student volunteering in Ireland. A 2014 study in DCU³⁷ highlighted that student volunteering has changed over the years with more students becoming engaged directly in community organisations. Students participate in volunteering for a wide variety of reasons. They can be motivated by a desire to help others and to contribute to their local community. Volunteering can also provide an activity focus for meeting new people or for gaining work experience and new skills, improving employability and enhancing their curriculum vitae. Overall, volunteering can be mutually beneficial for students and for the communities and organisations with whom they work.

All of the publicly funded HEIs engage with community programmes and initiatives which have been designed to build community support and civic engagement. These include youth work, providing teaching assistance, educating and mentoring both adult and young students, fundraising for worthy causes, care for the elderly, and environmental-related volunteering (conservation etc.) Indeed, engagement with communities and supporting access to higher education is a core element of the mission of HEIs in Ireland. This can also be demonstrated in the work of the Campus Engage³⁸ National Network which is an initiative led by the 7 Irish Universities and DIT. It has been set up to promote civic and community engagement as a core function of Higher Education, by better enabling HEIs, their staff and students across all disciplines, to engage with the needs of the communities they serve.

Being a Good Neighbour – Respecting the Local Community:

The GDA report referred to earlier, highlighted that in the UK one of the most effective forms of practice is the production of student housing guides, with some excellent current collaborative examples by students’ unions and HEIs. This is particularly effective when they are distributed to all students when enrolling and registering at the beginning of each academic year. For example, when first year students leave halls of residence at the end of the year, Loughborough University, in collaboration with the students’ union, gives each student a keyring promoting the Silent Students Happy Homes (SSHH!) campaign and a leaflet about being a good neighbour. Students are also targeted with similar information at registration the following year.

The USI and the RTB annual Finance and Accommodation Guide³⁹ also includes a section dealing with anti-social behaviour and advice on how to be a good neighbour and flatmate.

To address the concerns raised, this Strategy sets out a number of Action Points which can be undertaken to ensure that students living in both existing and newly developed PBSA can be integrated into existing communities as seamlessly as possible.

³⁶ <http://ggda.ie/assets/Student-Integration-in-the-GG-Area-Report.pdf>

³⁷ <https://www.dcu.ie/sites/default/files/community/pdfs/Report2014.pdf>

³⁸ <http://www.campusengage.ie/about-campus-engage>

³⁹ <http://homes.usi.ie/wp-content/uploads/2016/10/USI-Finance-and-Accommodation-Guide-2016.pdf>

13 STUDENTS AND THEIR LOCAL COMMUNITIES

Action Points:

21. DES to work with DHPCLG and local authorities to emphasise the demand for additional PBSA, and the additional benefits that will arise from its development, as well as to further support and work with both HEIs and private developers to support the further development of PBSA.

Responsibility: DES in conjunction with DHPCLG.

22. The USI, local Students' Unions and HEIs will work together to highlight the potential for regeneration, community involvement, civic activities and engagement that arises from having an accommodation mix in an area that includes a significant proportion of student accommodation including PBSA through local and national campaigns.

Responsibility: HEIs in conjunction with USI and/or local Students' Unions.

23. HEIs in conjunction with USI and/or local students' unions will promote awareness of the importance of 'being a good neighbour' to students through the USI and the RTB annual Finance and Accommodation Guide or local Student Handbooks and through the work of students' union representatives. HEIs will give consideration to the development of a Finance and Accommodation Guide to be distributed to all students when enrolling and registering. This would emphasise the importance of promoting respect for the local community and potentially include information in relation to the local neighbourhood.

Responsibility: HEIs in conjunction with USI and/or local Students' Unions.

24. HEIs will further support the development of volunteering opportunities for students and staff members in local community engagement and community projects. This could include the identification with local community groups and organisations of particularly suitable projects for the involvement of students.

Responsibility: HEIs.

25. HEIs will continue to promote and develop the community utilisation of campus facilities.

Responsibility: HEIs.

26. Developers and managers of PBSA will be encouraged to develop and work on community engagement projects with a view to strengthening their role and acceptance in the community.

Responsibility: Developers and Managers of PBSA.

27. All developers and managers of PBSA should put in place an appropriate Management Plan for PBSA in order to minimise potential negative impacts of the development and its occupants on surrounding properties and neighbourhoods and to create a positive and safe living environment for students and develop and enhance the neighbourhoods in which they are situated for the betterment of the whole community.

Responsibility: Developers and Managers of PBSA.

31 May 2017 – Quarterly Report document tracking all known HEI and private developments of PBSA in Ireland:

PBSA bed spaces completed since the launch of *Rebuilding Ireland*:

DEVELOPER ENTITY	LOCATION	NUMBER OF BED SPACES	TIMELINE FOR DELIVERY
Maynooth University	Kildare	296	Completed September 2016
UCD	Dublin	350	Completed September 2016
KSH Europe Holdings	Digital Hub, Dublin	471	Completed July 2016
TOTAL		1,117	

TOTAL PUBLIC (HEIs) – 646 Bed Spaces

TOTAL PRIVATE INVESTMENT – 471 Bed Spaces

All of the known PBSA projects that have been completed since the launch of the *Rebuilding Ireland* Action Plan were either in Dublin, or within a 25km radius of Dublin.

Future pipeline of PBSA developments coming on-stream

Tables listed as follows:

- 1) Under Construction
- 2) Planning Permission Granted
- 3) Planning Permission Applied for
- 4) Pre-Planning / Potential Projects
- 5) Planning Permission Refused

1) UNDER CONSTRUCTION:

Developer	Number of Bed spaces	Location	Timeline for Delivery
Safestore (Ireland) Limited	48	Wexford Street, Dublin	Q. 2 2017
The Creedon Group	406	Mill Street, Dublin 8	Q. 3 2017
St. Augustine's Priory	7	Limerick City	Q. 2 2017
Global Student Accommodation	520	Gardiner Street, Dublin	Q. 4 2017
Targeted Investment Opportunities Ltd.	463	Dorset Street, Dublin	Q. 4 2017
IVS Student Development Bohermore Limited	81	Bohermore, Galway	Q. 1 2018
BAM Contractors Limited	303	Blackpitts, Dublin	Q. 2 2018
Iveragh Group	132	Grangegorman, Dublin	Q. 3 2018
Ziggurat Student Living	202	Western Road, Cork	Q. 3 2018
National University of Ireland Galway	429	NUIG, Galway	Q. 3 2018
Mortar Developments Properties	232	Church Street, Dublin	Q. 3 2018
Hattington Student Housing Limited	263	Thomas Street, Dublin	Q. 3 2018
McAlear & Rushe Limited	374	Summerhill, Dublin	Q. 3 2018

Developer	Number of Bed spaces	Location	Timeline for Delivery
GSA Developments (Ireland) Limited	571	Mill Street, Dublin	Q. 1 2019
O'Flynn Construction	970	Docklands, Dublin	Q. 1 2019
Trinity College University of Dublin	250	Pearse Street, Dublin	Q. 4 2019
Total	5,251		

TOTAL PUBLIC (HEIs) – 679 Bed Spaces

TOTAL PRIVATE INVESTMENT – 4,572 Bed Spaces

The geographic breakdown of all of the known PBSA projects which are currently under construction as of 31 May 2017 is as follows:

Dublin (or within a 25km radius of Dublin) – 4,532 Bed Spaces

Galway – 510 Bed Spaces

Cork – 202 Bed Spaces

Limerick – 7 Bed Spaces

2) PLANNING PERMISSION GRANTED:

Developer	Number of Bed spaces	Location	Date Permission Granted
Hattington Student Housing Ltd.	329	Montpelier Hill, Dublin 7	02/03/2017
BFJ Developments Ltd.	16	Drumcondra Road Lower, Dublin	17/02/2017
Van Dijk Architects Ltd.	300	Dundalk, Co. Louth	10/01/2017
Marlet Property Group	203	Stoneybatter, Dublin 7	05/01/2017
Greenharts Properties Ltd.	308	Brown Street, Dublin 8	02/12/2016
CWC Webworks Limited	147	Fairgreen Road, Galway	18/09/2016
Rhonellen Developments Limited	130	Dominick Street Upper, Dublin 7	11/08/2016
Forward Thinking, Future Planning	115	Maynooth, Co. Kildare	28/03/2017
Daniel Hynes	8	Rhebogue, Co. Limerick	04/05/2017
Mideam Limited	14	Magazine Road, Cork	04/04/2017
Ziggurat Limited	77	Dominick Street Upper, Dublin 7	08/05/2017
Montesa Limited	348	Bishopstown, Cork	17/05/2017
Total	1,995		

TOTAL PUBLIC (HEIs) – 0 Bed Spaces

TOTAL PRIVATE INVESTMENT – 1,995 Bed Spaces

The geographic breakdown of all of the known PBSA projects which have been granted planning permission but which have not commenced construction is as follows:

Dublin (or within a 25km radius of Dublin) – 1,178 Bed Spaces

Cork – 362 Bed Spaces

Galway – 147 Bed Spaces

Louth – 300 Bed Spaces

Limerick – 8 Bed Spaces

3) PLANNING PERMISSION APPLIED FOR:

DEVELOPER ENTITY	NUMBER OF BED SPACES	LOCATION	Application Date
Summix WSC Developments	161	Cork	25/01/2017
Ziggurat Limited	247	Dublin	19/01/2017
Carrowmore Property Limited	117	Dublin	13/01/2017
The Park Shopping Centre	541	Dublin	12/01/2017
Ziggurat Limited	444	Dublin	05/12/2016
Grant Thornton (Receiver)	155	Cork	28/10/2016
Bonham Dock Limited	345	Galway	05/05/2017
Crosslane Student Developments UK Limited	232	Dublin	03/05/2017
Summix WSC Developments Limited	242	Cork	28/04/2017
Summix WSC Developments Limited	349	Dublin	28/04/2017
Lyonshall Limited	350	Cork	12/04/2017
Mm Capital Limited	341	Dublin	04/04/2017
TOTAL	3,524		

TOTAL PUBLIC (HEIs) – 0 Bed Spaces

TOTAL PRIVATE INVESTMENT – 3,524 Bed Spaces

The geographic breakdown of all of the known PBSA projects which have applied for planning permission but which have not been granted permission at the current time is as follows:

Dublin (or within a 25km radius of Dublin) – 2,271 Bed Spaces

Cork – 908 Bed Spaces

Galway – 345 Bed Spaces

4) Pre-Planning / Potential Projects:

Name of HEI	No: of Planned Bed Spaces	Estimated Delivery Timescale
DCU	800	2020 / 2021 (To be delivered in 2 Phases of 300 in 2020 and 500 in 2021)
NUIG	One Plan already listed under construction + further plan for 470.	2018 for plan under construction and potential identified for another additional phase of 470 potentially delivered by 2020.
DIT	2,000	2019/20 for initial phase of 700 with the further potential identified for other additional phases as well to be delivered after 2021.
TCD	Plans listed under construction	2019
UCC	230	2019
UL	1,350	2019 – 2021 (To be delivered in 3 Phases of 500 in 2019, an additional 500 in 2020/21 and a further 350 in 2021)

Name of HEI	No: of Planned Bed Spaces	Estimated Delivery Timescale
UCD	3,038	2019 – 2023 (To be delivered in 3 Phases of 924 in 2019, an additional 1,254 in 2021 and a further 860 in 2023)
MU	2,555	To be delivered in 4 phases. 2020 for initial phase of 300 with an additional phase of 200 in 2021 and further phases of 1,055 and 1,000 to be delivered after 2021.
Total	Total - 10,443	

TOTAL PUBLIC (HEIs) – 10,443 Bed Spaces

TOTAL PRIVATE INVESTMENT – 0 Bed Spaces

The geographic breakdown of all of the known PBSA projects which are at the Pre-Planning / Potential Project phase is as follows:

Dublin (or within a 25km radius of Dublin) – 8,393 Bed Spaces

Galway – 470 Bed Spaces

Limerick – 1,350 Bed Spaces

Cork – 230 Bed Spaces

5) Planning Permission Refused

DEVELOPER ENTITY	LOCATION	NUMBER OF BED SPACES	TIMELINE FOR DELIVERY	ADDITIONAL INFORMATION
Atlantic Diamond	Parnell Square, Dublin 1	13	None at Present	Permission Refused – (No: 2456/15)
Kesteven Ltd.	Aungier Street, Dublin 2	300	None at Present	Permission Refused – April 2016 (No: 3971/15)
Global Student Accommodation	Broadstone Hall, Dublin 7	96	None at Present	Permission Refused – May 2016 (No: 2383/16)
TOTAL		409		

Appendix B: DHPCLG Circular PL 8/2016 APH 2/2016:

This Circular outlined that Higher Education Institutes (HEIs) often occupy extensive campuses at urban locations which have significant potential for student housing development that can integrate with and complement the wider local community. Local authorities should assist in the development of student accommodation projects through their planning and development functions, including through the co-ordination of necessary infrastructural provision and appropriate pre-planning engagement. Local authorities should also consider collaborative development projects with HEIs in their area, particularly where suitable sites are available.

A flexible approach should be applied in respect of any planning conditions related to use/occupation of student accommodation. Such an approach would recognise the need to establish a steady rental income for such student accommodation throughout the year in order to ensure the deliverability of development projects from a financing point of view and recognise that student accommodation complexes can play an important role in providing affordable accommodation for tourists and visitors in major urban areas during peak summer demand periods.

Therefore, planning authorities should aim to avoid making permissions for student accommodation complexes subject to restrictions on alternative summer or holiday uses, while at the same time ensuring that student accommodation is:

- (1) not used for residential accommodation of a permanent nature;
- (2) safeguarded for use by students and other persons related to the HEI during the academic year; and
- (3) capable of being used for legitimate occupation by other persons/groups during holidays periods, when not required for student accommodation purposes.

The following is an appropriate sample condition for student accommodation relating to use.

Sample Student Accommodation Use Condition

The proposed development shall be used for:

- (1) student accommodation or accommodation related to a Higher Education Institute only during the academic year; or
- (2) student accommodation or accommodation related to a Higher Education Institute or tourist/visitor accommodation only during academic holiday periods.

The development shall not be used for the purposes of permanent residential accommodation, as a hotel, hostel, apart-hotel or similar use without a prior grant of permission.

REASON: In the interests of the proper planning and sustainable development of the area

Extract from Dublin City Development Plan 2016 – 2022

The Policy of Dublin City Council is to plan for future expansion of third-level institutions and to accommodate growth in the international education sector. The Plan recognises that there is a need for appropriately located high-quality, purpose-built and professionally managed student housing schemes, which can make the city's educational institutions more attractive to students from Ireland and abroad, and can also become a revitalising force for regeneration areas.

The Plan details both the external and internal standards that will apply to all proposals for student accommodation. Proposals for student accommodation are obliged to comply with the 'Guidelines for Student Accommodation' contained in the development standards.

The designation in May 2014 of a 66Ha area in Docklands as a Strategic Development Zone (SDZ) will facilitate a new residential community within easy access of the city centre retail core. An SDZ has also been designated for the DIT campus in Grangegorman where a substantial student population will now be a stimulus for retail provision in the area. Both developments are important to reversing population decline and consequent retail shrinkage that has occurred over previous decades.

Guidelines for Student Accommodation contained in Dublin City Council Development Plan:

The City Council supports the provision of high-quality, professionally managed, purpose built third-level student accommodation, either on campus or in accessible locations adjacent to quality public transport corridors and cycle routes, in a manner which respects the residential amenities of the locality. Student accommodation should make a positive contribution to the built environment, in terms of design quality, scale, height and the relationship to adjacent buildings. The external layout, including any necessary security arrangements should be designed to avoid isolating developments from the surrounding community.

The student accommodation should be designed to give optimum orientation in terms of daylight to habitable rooms. Given the nature of student occupancy, the residential standards in relation to dual aspect may be relaxed. Proposed developments shall be guided by the principles of Site Layout Planning for Daylight and Sunlight, A guide to good practice (Building Research Establishment Report, 2011).

Adequate open space of suitable orientation should be provided within developments for the amenity of students, which can include terraces, courtyards and roof gardens, where appropriate.

In assessing proposals, the planning authority will have regard to the pattern and distribution of student accommodation in the locality, and will resist the overconcentration of such schemes in any one area, in the interests of achieving, a sustainable mix of development, whilst also providing for successful urban regeneration, good public transport/cycling/walking connectivity, and the protection of residential amenity.

The applicant will be requested to submit evidence to demonstrate that there is not an overconcentration of student accommodation within an area, including a map showing all such facilities within 0.25km of a proposal.

The provisions of Part V (Social & Affordable Housing) of the Planning Acts do not apply to student accommodation in the City Council area.

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6. Technological Higher Education Association
7. Union of Students' Ireland
8. Construction Information Services
9. UCD Students' Union
10. Dublin Institute of Technology
11. Trinity College Dublin
12. University College Dublin
13. University College Cork
14. Maynooth University
15. National University of Ireland Galway
16. University of Limerick
17. Dublin City University
18. IT Sligo
19. Letterkenny IT
20. Athlone Institute of Technology
21. Dundalk Institute of Technology
22. IT Tallaght
23. IT Blanchardstown

24. Dun Laoghaire IADT
25. IT Carlow
26. Waterford Institute of Technology
27. Limerick Institute of Technology
28. Cork Institute of Technology
29. IT Tralee
30. GMIT
31. NAMA
32. Ireland Strategic Investment Fund
33. National Economic and Social Council
34. Oireachtas Committee on Housing and Homelessness
35. Housing Finance Agency
36. European Investment Bank
37. GSA Ireland – Global Student Accommodation
38. Winters Property Management DAC
39. SOLAS
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41. Ziggurat
42. NTM Capital
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44. Grangegorman Development Agency
45. JLL Property
46. Atelier Property Group



