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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 forms part of the evidence base for the new LDP, to assess the suitability, availability and achievability of monitored sites to contribute to a viable supply of land, alongside the identification of new sites that could be later zoned for residential use as part of the LDP process.

Belfast City Council (the “Council”) commissioned work on a high level UCS which was completed in March 2018. The new sites identified in the UCS are not included in the Monitor, as further assessment of the suitability for housing on those sites may be undertaken. A summary of the new sites is contained in Section 4 of this report.

It should be noted that there has been a minor change to the methodology between the production of the 2016/17 report and the 2017/18 report, resulting from the UCS. Whilst previous Monitors have used the 2001 urban footprint² as a baseline position for monitoring purposes, this was updated as part of the UCS. The amendments included minor additions and deletions made to align with up-to-date OSNI base mapping (e.g.

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 Urban Footprint is defined in the Regional Development Strategy 2035 as: “...the continuous built-up area of the settlement. The boundary will be represented by an uninterrupted line, often lying inside the planned settlement limit. The urban footprint contains land which has a formal urban use including land on the edge of the settlement where it forms part of the curtilage of a building. However, this does not necessarily imply that gardens are acceptable for housing development. Undeveloped zoned land at the edge of the settlement will be excluded.”

ensuring the whole of a properties' curtilage was included, etc.) and to account for new developments that have taken place since 2001.

As a minor change to the overall methodology that only affects a small number of monitor sites, the net effect is negligible and it is not considered to impact the a year-on-year comparison. This 2018 urban footprint therefore now forms a revised baseline position for the 2017/18 monitor period onwards.

3. Summary Tables and Graphs

The following summary tables detail the supply of housing for the Belfast district from 1 April 2017 to 31 March 2018 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 2017 to 31 March 2018** – the area of land in hectares (ha) developed during the current monitor year;
- **Area Developed 1 April 2015 to 31 March 2018** – 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 2017 to 31 March 2018** – the number of dwellings completed during the current monitor year;

- **Units Complete 1 April 2015 to 31 March 2018** – the cumulative total number of dwellings completed to date from 1 April 2015 (the date at which the Council gained statutory responsibility for planning);
- **Units Dev. Within the Urban Footprint (%) 1 April 2017 to 31 March 2018** – the portion of dwellings completed within the Urban Footprint during the current monitor year expressed as a percentage of the total number of dwellings completed; and
- **Available Potential (Hectares)** – the area of land estimated as available for additional dwelling completions within the monitored sites as at 1 April 2018.

During the 2017/18 monitoring year 659 units were completed on 19.4 ha of land across the District. 408.9 ha of land remains, with potential capacity for 22,354 units. Within Belfast City, 644 units completed were within Outer Belfast, with the remaining 15 units completed within the City Centre. 13,748 of the available potential units are within Outer Belfast, whilst 5,452 and 3,150 potential dwelling units remain in the City Centre and Harbour Area respectively. No units have been completed in any of the other settlements and only 4 available potential units remain within the three Small Settlements combined.

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 fallen by 7.7% from 714 in 2016/17 to 659 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' 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 a proportion of dwellings completed within the Urban 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.

82.1% of the 659 units completed within Belfast City were built on land within the Urban Footprint. Of the remaining potential dwelling units, 93.1% remain within the Urban Footprint.²

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 fallen from 93% to 82.1%.

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 units completed and the remaining potential dwelling units on both housing or mixed use zoned land expressed as a percentage of the total number of dwellings completed.

31.7% of the dwelling units completed during 2017/18 have been delivered on zoned land within Belfast City. No units have been completed on zoned land within the small settlements. The number of units completed on all other land was 450 dwellings.

Figure 3 shows the proportion 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 2017/18 to present. The proportion has been 28.6% over the three-year period. Figure 4 shows the total number of units completed on all other land. This 'windfall' provision has fallen from 494 units in 2016/17 to 450 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, 38.9% is currently zoned for housing or mixed use. 4,565 of the available 22,350 potential dwelling units can be delivered on land zoned for housing and 4,125 units on land zoned for mixed use. In comparison, 13,664 of the remaining potential units can be provided on all other land.

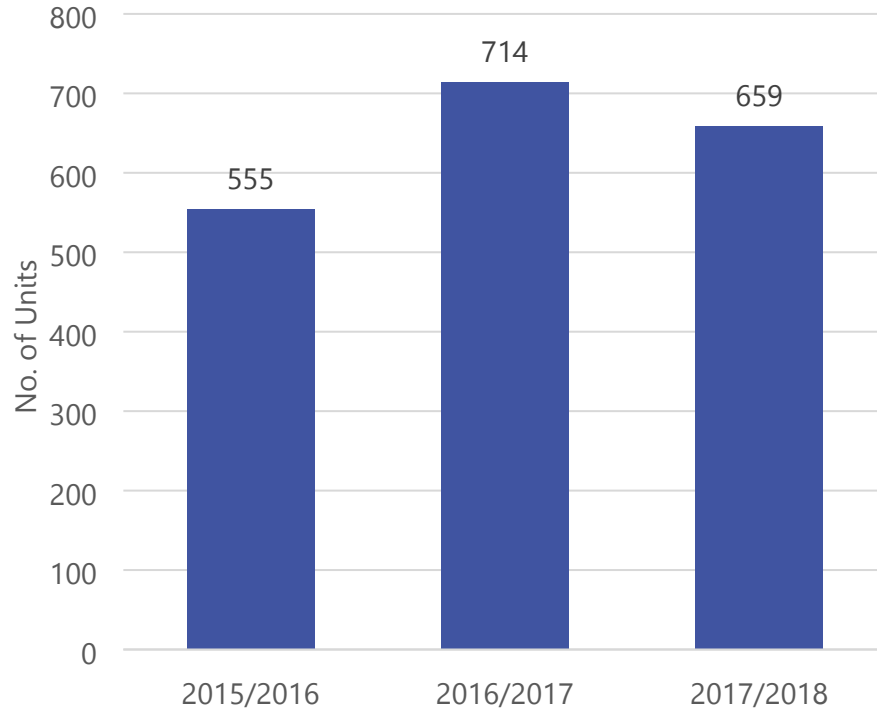
Table 1: Settlement Summary 2017/18

Settlement	Area Developed (Hectares)		Units Complete		Available Potential (Hectares)	Available Potential (Dwelling Units)
	01-04-17 to 31-03-18	01-04-15 to 31-03-18	01-04-17 to 31-03-18	01-04-15 to 31-03-18		
Belfast City						
Outer Belfast	19.3	50.2	644	1,753	285.5	13,748
City Centre	0.1	1.3	15	103	36.8	5,452
Harbour Area	0	0	0	0	86.1	3,150
Belfast City Total	19.4	51.5	659	1,856	408.4	22,350
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	19.4	52.3	659	1,877	408.9	22,354

Table 2: Urban Footprint Summary 2017/18

Settlement / Area	Area Developed (Hectares)		Units Complete		Available Potential (Hectares)	Available Potential (Dwelling Units)
	01-04-17 to 31-03-18	01-04-15 to 31-03-18	01-04-17 to 31-03-18	01-04-15 to 31-03-18		
Urban Footprint	12.8	29.4	541	1,161	340.1	20,816
<i>Units within the Urban Footprint (%)</i>	-	-	82.1%	93.0%	-	93.1%
Greenfield	6.6	5.1	118	87	68.3	1,534
Belfast City Total	19.4	34.5	659	1,248.0	408.4	22,350

**Figure 1: Total Dwellings Completed
2015-2018**



**Figure 2: Proportion of Dwellings Within the Urban Footprint
2015-2018**

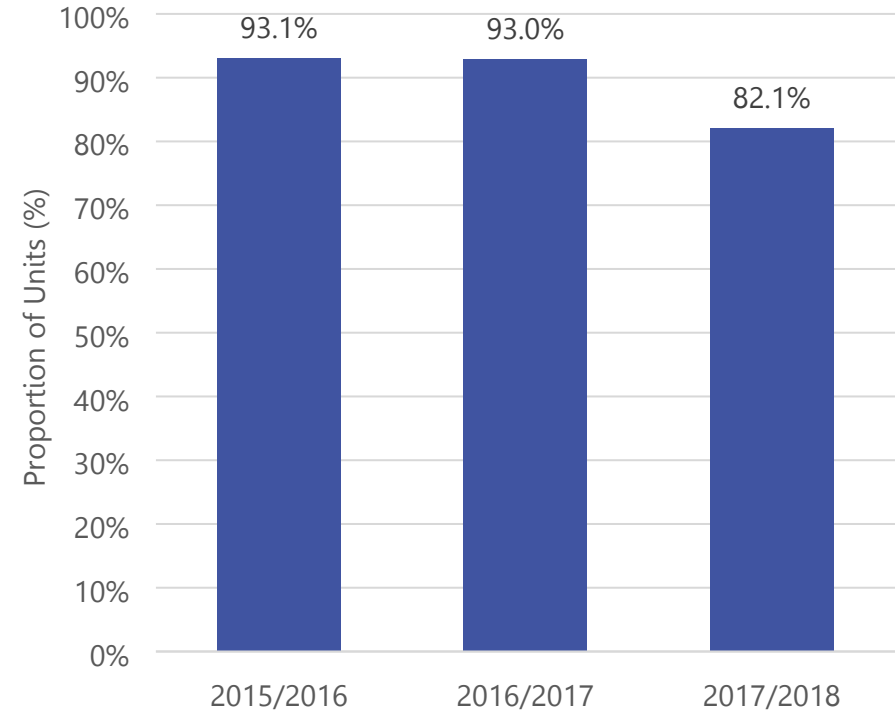
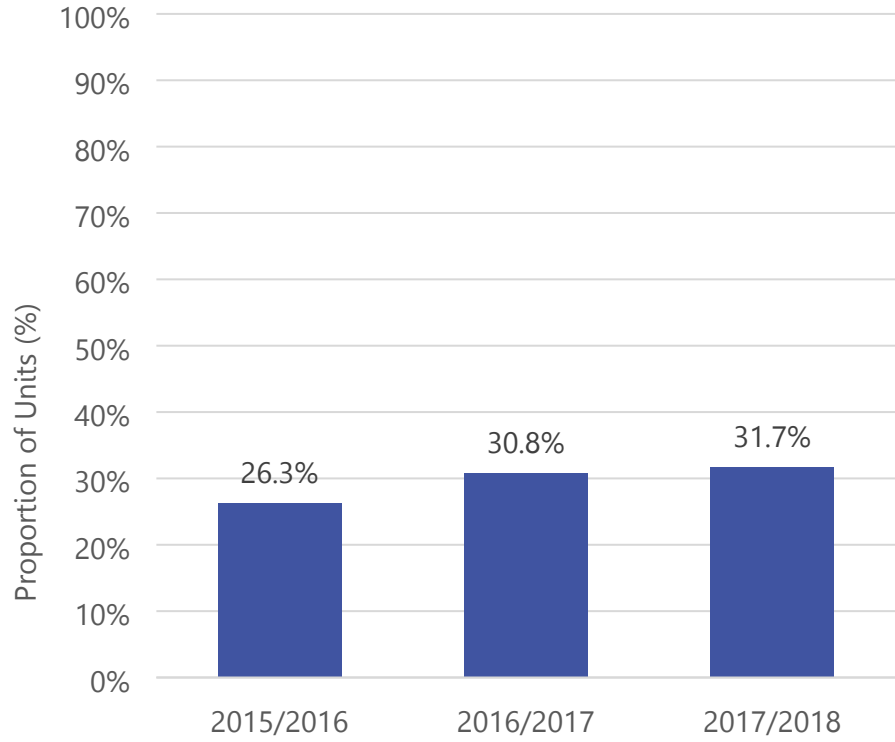


Table 3: Land Use Zoning Completed Units 2017/18

Settlement / Area	Units Complete									
	Land Zoned for Housing		Land Zoned for Mixed Use		All other land		Total		Proportion on Zoned Land (%)	
	01-04-17 to 31-03-18	01-04-15 to 31-03-18	01-04-17 to 31-03-18	01-04-15 to 31-03-18	01-04-17 to 31-03-18	01-04-15 to 31-03-18	01-04-17 to 31-03-18	01-04-15 to 31-03-18	01-04-17 to 31-03-18	01-04-15 to 31-03-18
Belfast										
Outer Belfast	209	472	0	60	435	1,221	644	1,753	32.5%	30.3%
City Centre	0	4	0	0	15	99	15	103	0.0%	3.9%
Harbour Area	0	0	0	0	0	0	0	0	n/a	n/a
Belfast Total	209	476	0	60	450	1,320	659	1,856	31.7%	28.9%
Small Settlements										
Edenderry	0	0	0	0	0	0	0	0	n/a	n/a
Hannahstown	0	0	0	0	0	21	0	21	n/a	0.0%
Loughview	0	0	0	0	0	0	0	0	n/a	n/a
Small Settlement Total	0	0	0	0	0	21	0	21	0.0%	0.0%
DISTRICT TOTAL	209	476	0	60	450	1,341	659	1,877	31.7%	28.6%

**Figure 3: Proportion of Units Complete on Zoned land
2015-2018**



**Figure 4: No. of Units Complete on All Other Land
2015-2018**

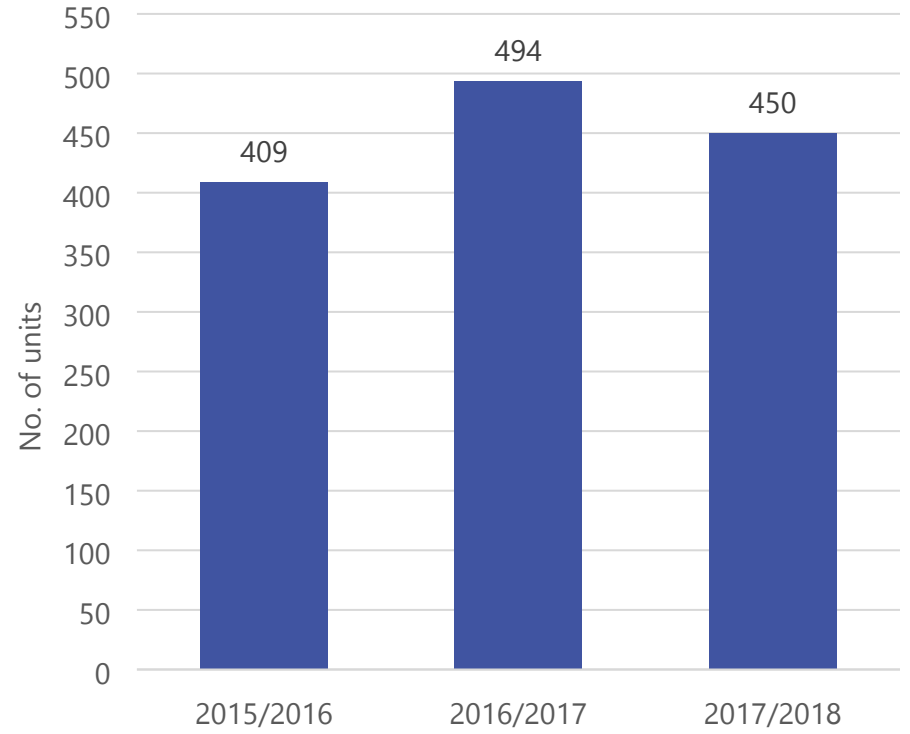


Table 4: Land Use Zoning Remaining Potential Units 2017/18

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	3,813	1,100	8,835	13,748	35.7%
City Centre	752	0	4,700	5,452	13.8%
Harbour Area	0	3,025	125	3,150	96.0%
Belfast City Total	4,565	4,125	13,660	22,350	38.9%
Small Settlements					
Edenderry	0	0	0	0	n/a
Hannahstown	0	0	3	3	0.0%
Loughview	0	0	1	1	0.0%
Small Settlement Total	0	0	4	4	0.0%
DISTRICT TOTAL	4,565	4,125	13,664	22,354	38.9%

4. Urban Capacity Study (March 2018)

The UCS, dated March 2018, provides a high-level assessment of the potential capacity to accommodate future housing and economic development within the district, including the type of housing and density of development appropriate to each site. In relation to capacity for future housing growth within the urban footprint, the UCS methodology used existing 2016/17 Monitor sites as the starting point (excluding those yielding less than 5 residential units). As these sites are already included in this 2017/18 Monitor report, only the new sites provide any additional future housing growth potential within the urban footprint.

A total of 268 new sites were identified within the urban footprint, of which 217 were retained, following consideration of absolute constraints and the assessment of suitability, availability and achievability. 16 of the 217 sites were deemed as suitable for employment, leaving 201 sites remaining. Table 5 provides a summary of these new sites identified within the UCS by Settlement Area. 118 were deemed suitable for housing with an indicative yield of 4,618 gross housing units. The remaining 83 sites were deemed suitable for either housing or employment or a mix of both, providing an indicative housing yield of 5,068 units. In total the new sites are estimated to have potential capacity for up to 9,686 units.

These new sites identified in the UCS are not included in this year's housing Monitor, as further assessment of the suitability for housing on those sites may be undertaken. Where appropriate, new sites deemed suitable for housing within the UCS may be brought forward as future zonings for residential use and would therefore be included in future monitoring once a new Local Development Plan is adopted.

Table 5: Urban Capacity Study – New Sites

Settlement	New sites suitable for housing			New sites suitable for housing or employment ³			Total ³		
	No. of sites	Area of sites (Ha)	Indicative capacity of sites	No. of sites	Area of sites (Ha)	Indicative housing capacity of sites	No. of sites	Area of sites (Ha)	Indicative housing capacity of sites
Outer Belfast	108	67.2	4,187	3	3.7	530		70.9	4,717
City Centre	10	1.4	431	80	15.5	4,538		16.9	4,969
Harbour Area	0	0	0	0	0	0	0	0	0
BELFAST CITY TOTAL	118	68.6	4,618	83	19.2	5,068	201	87.8	9,686

³ Where sites might be considered suitable for more than one use or for mixed use development, the estimated capacity is the maximum – i.e. what would be delivered if the site was used for only housing. In reality, many of these sites could see mixed use development, particularly within the City Centre, meaning that the theoretical indicative housing capacity is unlikely to be reached in all cases.

Appendix A Summary Methodology

The Housing Land Availability 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 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.

