SD006F

Belfast Local Development Plan

Submission Topic Paper

Regional Growth Comparison

Belfast City Council

Energising Belfast

www.belfastcity.gov.uk/LDP

Contents

Appendices

List of Figures

Figures in main report

Figures in appendices

1.0 Introduction

1.1 The purpose of this report is to outline:

- How housing monitor delivery since 2012 affects the RDS assigned HGI for Belfast;
- How the proposed growth figures for Belfast compare to those proposed in the other 10 LGD's; and
- How the growth figures proposed across the LGD's compare to the regional targets for the Belfast Metropolitan Area (BMA) and non-BMA, as set out in the RDS.

1.2 This report brings together information from the Housing Monitor, Belfast draft Plan Strategy and the suite of DPS's and POP's covering the remaining 10 Local Government Districts (LGD's).

1.3 Figure 1.1 outlines the housing monitor delivery since 2012/13 and compares this to the RDS allocated HGI figure for Belfast and the shortfall to the LDP POP (both calculated on an annual basis).

Figure 1.1 Housing Monitor Delivery since 2012, shortfall to HGI and to POP growth figure

	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2017/18	Total
Housing Monitor Delivery	639	675	386	555	714	659	830	4,458
Shortfall to HGI (1,054)	415	379	668	499	340	395	224	2,920
Shortfall to LDP POP (1,750)	-	-	1,364	1,195	1,036	1,091	920	5,606

1.4 A more accurate HGI allocation for the plan period is therefore 18,730 units, as shown in Figure 1.2.

Figure 1.2 Revised Belfast HGI taking account of 15 year plan period and shortfall since 2012

LDP POP basis – 2014-2035 (21 years) 37,000 units = @1,750 per year.

RDS HGI for Belfast 2012-2025 is **13,700** units. Annual rate of **1,054** units per year.

↓

Total allocated HGI units over plan period (2020-2035). 1,054 x 15 = @**15,810** units.

↓

The HGI shortfall since the baseline of 2012 is 2,920 units. Adding this to the RDS assigned HGI's for the 15 year plan period - 15,810 [(13,700 / 13) x 15] - gives a revised Belfast HGI of **18,730** units for the plan period 2020-35.

1.5 The summary Figure 1.3 provides a comparison.

Figure 1.3 Revised HGI comparison table

	Plan period 2020-2035 (units)
Revised Belfast HGI figure	18,730
Current housing monitor available potential[1]	22,074
NIHE HMA affordable need[2]	23,550
UCS[3]	27,163
DPS[4]	31,660

Comments

1.6 The affordable housing need for Belfast over the Plan period (23,550) exceeds the RDS assigned HGI by 9,850 units. It also exceeds the revised HGI figure by 4,820 units. This is before consideration of the demand for homes for market sale over the plan period. The UCS figure of 27,163 includes already committed sites. These total @19,000 units in Belfast. On their own, these exceed the RDS assigned HGI by over 5,000 units and closely correlate with the revised HGI of 18,730.

[1] *2018/19 figure – based on 398.6 ha of land remaining within the district*
[2] *Based on need identified in most recently available HMA (Sept 2017)*
[3] *Including committed and new sites, and assuming a 70/30 ratio of housing to employment on mixed use sites*
[4] *Includes windfall allocation and capacity outside urban footprint*

2.0 Comparison of LGD growth rates for the BMA

2.1 Figure 1.5[5] sets out the RDS HGI figures for the period 2012-2025 and compares the annual growth figures set out in 7 POP's and 4 Draft Plan Strategys:

- Based on the RDS HGI's, the four districts that make up the BMA are to account for 40% of the regional growth.
- Belfast, Antrim & Newtownabbey, Lisburn & Castlereagh, together with Ards and North Down, which form the Belfast Metropolitan Area, would account for 45.3% of the region's proposed growth. A small part of Mid & East Antrim, incorporating the main settlement of Carrickfergus, is located within the Belfast Metropolitan Urban area, and located within the BMAP boundary – this will also be factored into the figures in Figure 1.8[5].

2.2 Figure 1.6[5] adjusts the RDS HGI figure for Belfast to account for the shortfall since 2012, giving a revised HGI of 18,730:

- Whereas Figure 1.5[5] outlines that Belfast proposes a level of growth 100% above its assigned RDS HGI, using the revised HGI figure of 18,730 in Figure 1.6[5] reduces this to 46%.
- It is important to note that the Belfast Metropolitan Area boundary does not correlate with the new LGD's. Map 1.1 (see Appendix B) shows the Belfast Metropolitan Area Plan boundary in pink, LGD boundaries in blue and designated settlements in brown. This map enables determination of which settlements within the respective LGD's form part of the BMA and which lie outside it. Of note, Antrim and Newtownabbey district is not located entirely within the BMA boundary. Figure 1.6[5] recognises this by adjusting the figure for Antrim & Newtownabbey accordingly.
- Figure 1.7[5] of the Antrim & Newtownabbey DPS sets out the distribution of the proposed growth across the settlements of the Plan area. Omitting the allocations from the settlements lying outside the BMA means that only 57% of Antrim & Newtownabbey's proposed growth lies within the BMA, equating to 5,558 dwellings (or 371 units per annum).
- Taking account of the revised Belfast HGI and the adjusted Antrim & Newtownabbey figure would mean that the proposed BMA growth over and above the RDS HGI reduced from 45.3% to 42.2%.
- Applying this adjustment to the Antrim & Newtownabbey HGI apportioned between BMA and non-BMA (green boxes) reduces the BMA's share of the overall regional HGI total from 40% to 38.6%.

2.3 Figure 1.7 (Appendix A) includes the above adjustments, but makes a further change in respect of Ards & North Down district, due to many of its settlements, including Newtownards, Comber, Donaghadee and Portavogie, being located outside the BMA.

[5] Figures 1.5 – 1.8 are contained in Appendix A.

Scrutinising Tables 5 and 6 of the Ards & North Down POP and omitting the settlements located outside the BMA, results in a reduction of approximately 80% zoned housing capacity:

- Taking this as a guide and applying the 80% reduction to the annual target over the plan period reduces the figure from 546 to 110 units per annum.
- Applying this adjustment to the Ards & North Down HGI apportioned between BMA and non-BMA (green boxes) reduces the BMA's share of the overall regional HGI total further from 38.6% to 34.2%.
- As Figure 1.7 in Appendix A shows, this further change would result in 37.4% of the proposed regional growth being within the BMA, which is 2.6% points below the 40% apportioned by the RDS HGI's (Figure 1.5).

2.4 Figure 1.8 (Appendix A) includes the above adjustments, but makes a further change in respect of Mid & East Antrim district, due to Carrickfergus being located within the BMA. The Mid & East Antrim POP outlines that 58.5% of the HGI growth over the plan period will be assigned to the 3 main towns of Ballymena, Larne and Carrickfergus – a total of 3,645 units, although it does not clarify the figure that will be assigned to each. It does however outline the 2016 Housing Monitor remaining capacity for each of these main towns and this can be used as a rudimentary estimate of the HGI share for Carrickfergus. Totalling the three main towns, Carrick has 30% of the remaining capacity. Therefore, assigning 30% of HGI share for the main towns to Carrick arrives at a figure of 1,094 units. This is 17.5% of the total HGI for Mid & East Antrim over the plan period:

- Applying these reductions to the proposed annual average for Mid & East Antrim reduces it from 415 units per annum to 73 units per annum for the BMA (the remaining 436 annual units are included as non-BMA).
- Applying this adjustment to the Mid & East Antrim HGI apportioned between BMA and non-BMA (green boxes) increases the BMA's share of the overall regional HGI total further from 34.2% to 35.1%.
- As Figure 1.8 (Appendix A) shows, this further change would result in 38.2% of the proposed regional growth being within the BMA, which is 1.8% points below the 40% target outlined in the RDS as per Figure 1.5.

3.0 Technical Summary of Figures 1.5 – 1.8 (Appendix A)

3.1 In summary, the key points arising from scrutiny of the above figures are that:

- **a)** When the Belfast HGI allocation for 2012-2025 is adjusted to account for the 15 year plan period and the shortfall since 2012, (refer Figure 1.2), it increases to 18,730 units. This reduces Belfast's proposed level of growth for the plan period to 46% above the HGI (refer Figure 1.6) and increases the BMA regional split from 40% to 43%.
- **b)** As Figure 1.5 shows, the revised RDS HGI figures for 2012-2025 indicate a 60-40 split between the BMA and the rest of NI. These revised HGI figures are based on the new 11 LGD model that came into operation in 2015. These new LGD boundaries do not align perfectly with the BMA. Whilst Belfast and Lisburn & Castlereagh districts lie wholly within the BMA, three LGD's – namely Antrim & Newtownabbey, Ards & North Down and Mid & East Antrim – lie partly inside and partly outside. Therefore, in order to more accurately ascertain the percentage regional split between BMA and non-BMA, the figures for these three LGD's require adjustment.
- **c)** Assessing the proposed allocations within the settlements of the Antrim & Newtownabbey district results in a 57-43 split between BMA and non-BMA. Adjusting the figures in the green boxes in Figure 1.6 to account for this change and revised Belfast HGI figure results in a slight reduction to 39.9% of HGI growth in the BMA.
- **d)** When the HGI for Ards & North Down is also adjusted by analysing the zoned housing capacity of the settlements within its POP, this results in a significant reduction of approximately 80%. This is due to many of its settlements, including Newtownards, being located outside the BMA. Adjusting the figures in the green boxes in Figure 1.7 to account for this change results in a more significant reduction to 34.2% of HGI growth in the BMA. This increases again to 35.1% when Carrickfergus is factored into the figures.
- **e)** Figures 1.6 – 1.8 also show a comparison between the BMA percentage as per the 2012-2025 HGI's and the BMA percentage as per the LGD proposed annual growth targets. This is summarised in Figure 1.4 below.
- **f)** In terms of annual average LGD growth rates, taking account of the revised Belfast HGI and the adjusted Antrim & Newtownabbey figure would mean that the proposed BMA growth reduces from 45.3% to 42.2%.
- **g)** Also including the Ards & North Down adjustment reduces this figure further to 37.4%.
- **h)** A final adjustment is made to account for Carrickfergus being part of the BMA – this results in a small change to the figures, with the BMA share increasing to 38.2%.

Figure 1.4 Summary table

	BMA%	Non-BMA%
HGI 2012-2025 unadjusted figures (A)	40	60
Belfast HGI 2012-2025 adjusted for plan period and Belfast shortfall (B)	43	57
Proposed annual average units for LGD's unadjusted (C)	45.3	54.7
As for (B) plus adjustment for A & N district (D)	39.9	60.1
As for (C) plus proposed annual average units adjusted for A & N district (E)	42.2	57.8
As for (D) plus adjustment for A & ND district (F)	34.2	65.8
As for (E) plus proposed annual average units adjusted for A & ND district (G)	37.4	62.6
As for (F) plus adjustment for M & EA district (H)	35.1	64.9
As for (G) plus proposed annual average units adjusted for M & EA district (I)	38.2	61.8

3.2 The RDS 2035 refers to the 52% non-BMA 48% BMA split that was identified in the previous RDS. It outlines that in the 10-year period March 1998 – March 2008, a 57% non-BMA to 43% BMA housing growth split was observed. Notwithstanding, RDS 2035 considers it appropriate to retain the previous 52-48 ratio, given the objectives of the RDS and the timeframe for the implementation of development plans.

3.3 This exercise therefore serves to demonstrate that even when Belfast's HGI is adjusted as above, and account is taken of BMA versus LGD geographies, the proposed regional growth split of 62% non-BMA 38% BMA is still significantly below the RDS ratio of 57-48, suggesting that Belfast's proposed level of growth, as the regional driver, is both necessary and with scope to further increase in the future.

Appendix A: Figures 1.5 – 1.8

Figure 1.5: Comparison of HGIs to emerging LDPs (unadjusted)

LGD	HGI (2012-2025)	Annual (HGI)	Start Year	End Year	POP Targets	Annual (POP)	DPS Target	Annual Average (DPS)	Annual Average (DPS or POP)	% diff. annual POP/DPS & HGI
ANTRIM AND NEWTOWNABBEY*	7,200	554	2015	2030	9,750	650	9,750	650	650	17%
ARMAGH CITY, BANBRIDGE AND CRAIGAVON	14,400	1,108	2015	2030	19,850	1,323			1,323	19%
BELFAST*	13,700	1,054	2020	2035	37,000	2,467	31,660	2,107	2,107	100%
CAUSEWAY COAST AND GLENS	6,700	515	2015	2030	7,731	515			515	0%
DERRY CITY AND STRABANE	5,000	385	2017	2032	12,000	800			800	108%
FERMANAGH AND OMAGH	4,500	346	2015	2030	5,190	346	5,190	346	346	0%
LISBURN AND CASTLEREAGH*	9,600	738	2012	2030	14,630	813			813	10%
MID AND EAST ANTRIM	5,400	415	2015	2030	6,230	415			415	0%
MID ULSTER	9,500	731	2015	2030	11,000	733	10,950	730	730	0%
NEWRY, MOURNE AND DOWN	10,900	838	2012	2030	15,092	838			838	0%
ARDS AND NORTH DOWN*	7,100	546	2015	2030	8,190	546			546	0%
*BMA	**37,600**	2,892			69,570	4,475			4,116	42%
Non-BMA	**56,400**	4,338			77,093	4,972			4,969	15%
TOTAL	**94,000**	7,231			146,663	9,447			9,084	26%
BMA%	**40.0%**							**BMA%**	**45.3%**	

Figure 1.6: Comparison of HGIs to emerging LDPs (Belfast HGI adjusted for shortfall, Antrim & Newtownabbey adjusted BMA)

LGD	HGI (2012-2025)	Annual (HGI)	Start Year	End Year	POP Targets	Annual (POP)	DPS Target	Annual Average (DPS)	Annual Average (DPS or POP)	% diff. annual POP/DPS & HGI
ANTRIM AND NEWTOWNABBEY*	7,200	554	2015	2030	9,750	650	9,750	650	371	17%
ARMAGH CITY, BANBRIDGE AND CRAIGAVON	14,400	1,108	2015	2030	19,850	1,323			1,323	19%
BELFAST*	**18,730**	1,440	2020	2035	37,000	2,467	31,660	2,107	2,107	46%
CAUSEWAY COAST AND GLENS	6,700	515	2015	2030	7,731	515			515	0%
DERRY CITY AND STRABANE	5,000	385	2017	2032	12,000	800			800	108%
FERMANAGH AND OMAGH	4,500	346	2015	2030	5,190	346	5,190	346	346	0%
LISBURN AND CASTLEREAGH*	9,600	738	2012	2030	14,630	813			813	10%
MID AND EAST ANTRIM	5,400	415	2015	2030	6,230	415			415	0%
MID ULSTER	9,500	731	2015	2030	11,000	733	10,950	730	730	0%
NEWRY, MOURNE AND DOWN	10,900	838	2012	2030	15,092	838			838	0%
ARDS AND NORTH DOWN*	7,100	546	2015	2030	8,190	546			546	0%
*BMA	**39,534**	3,278			69,570	4,475			3,837	17%
Non-BMA	**59,496**	4,338			77,093	4,972			5,248	21%
TOTAL	**99,030**	7,617			146,663	9,447			9,084	19%
BMA%	**39.9%**							**BMA%**	**42.2%**	

Figure 1.7: Comparison of HGIs to emerging LDPs (As for table 1.5 plus Ards & North Down adjusted BMA)

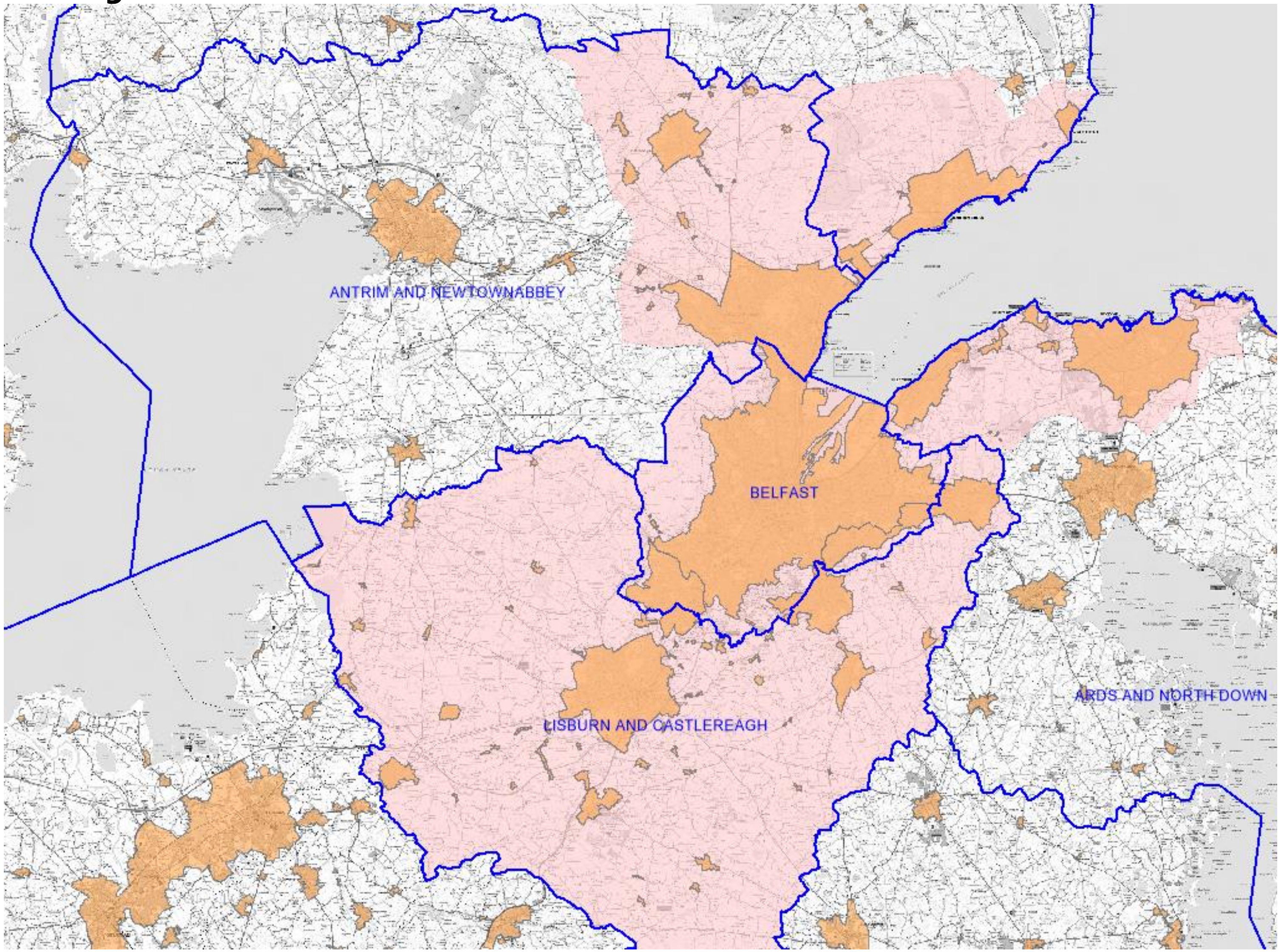
LGD	HGI (2012-2025)	Annual (HGI)	Start Year	End Year	POP Targets	Annual (POP)	DPS Target	Annual Average (DPS)	Annual Average (DPS or POP)	% diff. annual POP/DPS & HGI
ANTRIM AND NEWTOWNABBEY*	7,200	554	2015	2030	9,750	650	9,750	650	371	17%
ARMAGH CITY, BANBRIDGE AND CRAIGAVON	14,400	1,108	2015	2030	19,850	1,323			1,323	19%
BELFAST*	18,730	1,440	2020	2035	37,000	2,467	31,660	2,107	2,107	46%
CAUSEWAY COAST AND GLENS	6,700	515	2015	2030	7,731	515			515	0%
DERRY CITY AND STRABANE	5,000	385	2017	2032	12,000	800			800	108%
FERMANAGH AND OMAGH	4,500	346	2015	2030	5,190	346	5,190	346	346	0%
LISBURN AND CASTLEREAGH*	9,600	738	2012	2030	14,630	813			813	10%
MID AND EAST ANTRIM	5,400	415	2015	2030	6,230	415			415	0%
MID ULSTER	9,500	731	2015	2030	11,000	733	10,950	730	730	0%
NEWRY, MOURNE AND DOWN	10,900	838	2012	2030	15,092	838			838	0%
ARDS AND NORTH DOWN*	7,100	546	2015	2030	8,190	546			110	-80%
*BMA	33,854	3,278			69,570	4,475			3,401	4%
Non-BMA	65,176	4,338			77,093	4,972			5,684	31%
TOTAL	99,030	7,617			146,663	9,447			9,084	19%
BMA%	34.2%							BMA%	37.4%	

Figure 1.8: Comparison of HGIs to emerging LDPs (As for table 1.6 plus Mid & East Antrim adjustment for Carrickfergus)

LGD	HGI (2012-2025)	Annual (HGI)	Start Year	End Year	POP Targets	Annual (POP)	DPS Target	Annual Average (DPS)	Annual Average (DPS or POP)	% diff. annual POP/DPS & HGI
ANTRIM AND NEWTOWNABBEY*	7,200	554	2015	2030	9,750	650	9,750	650	371	17%
ARMAGH CITY, BANBRIDGE AND CRAIGAVON	14,400	1,108	2015	2030	19,850	1,323			1,323	19%
BELFAST*	18,730	1,440	2020	2035	37,000	2,467	31,660	2,107	2,107	46%
CAUSEWAY COAST AND GLENS	6,700	515	2015	2030	7,731	515			515	0%
DERRY CITY AND STRABANE	5,000	385	2017	2032	12,000	800			800	108%
FERMANAGH AND OMAGH	4,500	346	2015	2030	5,190	346	5,190	346	346	0%
LISBURN AND CASTLEREAGH*	9,600	738	2012	2030	14,630	813			813	10%
MID AND EAST ANTRIM	5,400	415	2015	2030	6,230	415			73	-82%
MID ULSTER	9,500	731	2015	2030	11,000	733	10,950	730	730	0%
NEWRY, MOURNE AND DOWN	10,900	838	2012	2030	15,092	838			838	0%
ARDS AND NORTH DOWN*	7,100	546	2015	2030	8,190	546			110	-80%
*BMA	34,799	3,278			69,570	4,475			3,474	6%
Non-BMA	64,231	4,338			77,093	4,972			5,610	29%
TOTAL	99,030	7,617			146,663	9,447			9,084	19%
BMA%	35.1%							BMA%	38.2%	

Note that the original format tables 1.5, 1.6, 1.7 and 1.8 are available in Excel format if required.

Appendix B: Map 1.1 Extract from MapInfo workspace showing BMAP boundary versus LGD's and existing settlements.



Belfast Planning Service
Belfast City Council
Cecil Ward Building
4-10 Linenhall Street
Belfast BT2 8BP

www.belfastcity.gov.uk/LDP
planning@belfastcity.gov.uk
028 9050 0510
@belfastcc
@belfastcitycouncil
Belfast City Council

Belfast City Council